DO

CONNECT
ACTIVATE
ACCELERATE

THE
PHILADELPHIA
FOUNDATION

2017 ANNUAL REPORT
HERE’S TO THE

DOERS...

The creators of action.
The masters of kinetic energy.
The initiators that make things happen.

The Philadelphia Foundation is proud to be counted among the DOers and to work with thousands more in our community.

2017 was a success because of you.

Here’s to the DOers!
WHO ARE THE DOERS?

Doers are leaders, organizers, givers, and volunteers. They’re backers, promoters, and participants. They’re scientists advancing tomorrow’s cures, philanthropists creating opportunity, and shelter workers providing homes to those in need.

DOers take many forms, but they fall into three primary categories.

The **Connectors** bring ideas and people together. They’re the bridge between two forces for good. **Activators** are the sulfur at the edge of a match. The spark plugs of action. The **Accelerators** add fuel to the engine, driving up speed, scale, and impact.

Each plays a critical role to produce lasting, positive change in our communities. In this report, we’ll highlight a series of case studies that exemplify the energetic spirit of the DOers, and salute their great accomplishments.
CONNECTORS

We bring together the donors and the doers, the innovators and influencers across the entire social-scape in an environment of positive energy and personal trust.
BRODY FELLOWSHIP
When Sara Brody passed away, she left behind a legacy of generosity, curiosity, and a determination to shine a light on the unknown causes and potential treatment for so-called “incurable” diseases and conditions.

These ideals are exemplified in the Brody Family Medical Trust Fund, which Sara set up at the Philadelphia Foundation to provide annual fellowships to local scientists studying diseases that have a substantial societal impact and for which no consistently effective cure presently exists. In 2017, we connected Dr. Shaili Aggarwal, Ph.D. and Dr. Shaun Sanders, Ph.D. with funding to explore new treatments for cocaine addiction and neurodevelopmental disorders. Their research has brought us closer than ever to understanding and treating these powerful afflictions.

OPENING OUR DOORS TO COMMUNITY
When it comes to advocating for social good, there’s no replacement for face-to-face interaction and information sharing.

That’s why our new location was designed with convening and collaboration in mind and why it has already become an asset to dozens of organizations and groups across sector, geography and causes in our community.

ON THE TABLE PHILLY
Some say the state of public discourse is at an all-time low. Not in Philadelphia.

Our On the Table Philly program challenged that notion in 2017 by bringing together over 2,000 people across the Greater Philadelphia region. They met at over 300 tables to engage in an open dialogue and inspire new solutions to strengthen communities. These engaged residents met in libraries, coffee shops, and public parks to share a meal and inspire new hyper-local solutions to community-specific issues. This gathering of minds resulted in new relationships, ideas, and initiatives to spark positive change.

CATCHAFIRE PARTNERSHIP
Building and sustaining a strong and effective organization remains an ongoing challenge for so many of our region’s nonprofits. But through partnership and collaboration, nonprofits can be matched with the resources they need.

In 2017, the Philadelphia Foundation launched its pilot program with Catchafire, an organization that connects skills-based volunteers with nonprofits to improve their operational effectiveness. Through our support of this pilot program, Greater Philadelphia nonprofits received — for free — over 5,100 hours from Catchafire’s pool of expert volunteers from the marketing, web development, operations, and strategy fields. In total, 387 organizations were served, 258 project matches were made and the results have been tremendous.

PHOTOS
A Brody Fellowship Awardee Dr. Shaili Aggarwal, Ph.D.
B Brody Fellowship Awardee Dr. Shaun Sanders, Ph.D.
C PA is Ready! gathers in October 2017 in our community room
D Philadelphia Foundation President & CEO Pedro Ramos participates in On the Table Philly
In today’s hyper-connected, technology-driven world, face-to-face conversations are happening less frequently. But when we come out from behind the message boards and social media accounts to share an in-person conversation, powerful connections are formed, ideas are inspired, and action is taken.

This is the spirit behind the On the Table initiative. On the Table Philly brought together over 2,000 people across the region at 300 tables in May of 2017. Residents met and broke bread in small groups to discuss how to make their communities better places to live, work and play. It was the first time the national initiative was piloted in Philadelphia, and the Philadelphia Foundation and the Knight Foundation were proud to serve as the event’s sponsors and organizers.

One goal for the day was to expand residents’ individual networks by connecting them with other leaders in their communities. Roughly 85% said the other people at their conversation were either mostly people they did not yet know, or an equal mix of people they did and didn’t know. On the Table Philly coordinator Phoebe Coles described a session she attended at Reading Terminal Market in Center City Philadelphia to the Philadelphia Tribune in terms of the importance of generating community discourse, and the powerful solutions that can result from it.

“There is a need for cultures to come talk more and understand each other more,” she said. “It is very difficult for us to understand what the similarities are because we are not really having those conversations.”

The voices of our community members are too often underappreciated or unheard. Through On the Table Philly, the power of conversation can build a bridge to new understanding. When people come together with the shared motivation of enacting positive change, good things happen.

“There is a need for cultures to come talk more and understand each other more.”
2,000
PEOPLE

300
TABLES

- equity and social inclusion
- education and youth development
- public safety and the judicial system
- economic issues and poverty

The Philadelphia Foundation 2017
ACTIVATORS

We unite causes with capital, and ambition with action to put ideas in motion. We keep things moving at every level — navigating obstacles and generating momentum that drives new efficiencies and uncovers new opportunities.
REPORT: THE FINANCIAL HEALTH OF PHILADELPHIA-AREA NONPROFITS

As nonprofits go, so go the services they provide to residents and our shared quality of life, including health and safety.

This is why we commissioned and published The Financial Health of Philadelphia-Area Nonprofits report: to find out exactly how financially resilient these key organizations are. After analyzing hundreds of Form 990s filed by local nonprofits, we revealed that managing financial risk is still a primary issue for many of these organizations. The report outlines several strategies nonprofits can use, including setting financial stability targets, scenario planning, and recovery and program continuity planning.

DREAMERS INITIATIVE

Late last year, nearly 6,000 people in Pennsylvania were told their legal ability to live in the U.S. through the DACA program would be revoked.

Those with DACA permits expiring in the next 6 months had a narrow window to renew them, but applications required a $495 fee. For many, coming up with the money on short notice would be nearly impossible, which is why we took action. Through its partnership with the PA is Ready! coalition, the Philadelphia Foundation launched a fundraising campaign to help Dreamers pay the fees and remain in their communities legally — able to work and attend school.

OCTAVIUS CATTO STATUE

On election day in 1871, Octavius V. Catto — a prominent African-American civil rights activist, scholar, athlete, and military officer — was shot dead on the streets of Philadelphia while promoting voting rights for African-Americans.

Catto’s legacy of activism on issues ranging from desegregation of trolley cars to education to voting rights received long-deserved acknowledgement on National Voter Registration Day in 2017 through a 12-foot-tall bronze statue erected at City Hall. The Philadelphia Foundation is thrilled to promote the effort and to serve as the monument’s fiscal sponsor, enabling contributors to support the statue, its future maintenance, and its powerful message to our own and future generations.

HURRICANE RELIEF IN PUERTO RICO

When Hurricane Maria made landfall on the southeastern coast of Puerto Rico on Sept. 20, 2017, no one truly knew what the extent of the damage would be.

Puerto Ricans buckled down and prepared for the impending storm, but there was no stopping the category 4 cyclone from wiping out electrical grids, displacing thousands of people, and sadly taking thousands of Puerto Rican lives. Already reeling from the impact of Hurricane Irma just weeks prior, Puerto Rico was in need of help. The Philadelphia Foundation supported the local community’s response by generating more than $68,300 in grants to help victims of these hurricanes, including $13,000 to provide residents with winter coats and shoes.

PHOTOS

A. Report results presented during a convening at WHYY
B. Disaster relief for Hurricane Maria survivors
C. Octavius Catto statue outside of City Hall
When the Deferred Action for Childhood Arrivals (DACA) program was terminated in late 2017, nearly 6,000 immigrant children living in Pennsylvania were put at risk of being deported from the country they call home.

Known as “Dreamers,” those previously protected by this program were forced to come up with $495 to pay a renewal fee by early October. For many, putting together the money in such a short timeframe would be incredibly difficult, if not impossible.

“My DACA expires in January,” one Dreamer told us upon hearing about the DACA program termination. “I currently don’t have a job since I just gave birth. I had a high-risk pregnancy, and my daughter has Down Syndrome. I need help financially for my renewal.”

For many of these Dreamers, life in Pennsylvania is the only life they know. They’re surrounded by family and friends and are ingrained in their local communities. Not one to sit idly by, the Philadelphia Foundation, in partnership with the PA is Ready! coalition and the Pennsylvania Immigrant and Citizenship Coalition (PICC), took action. We launched a fundraising campaign to cover the $495 fee for Dreamers in Pennsylvania and keep them in their homes.

The effort was a tremendous success. More than 230 donors from 13 counties across Pennsylvania contributed nearly $69,000 to this campaign.

The funds helped residents originally from Mexico, Honduras, Ecuador, and 11 other countries across the globe renew their permits on time, and additional dollars raised were used to support the ongoing work of immigrant-serving organizations through PA is Ready!

“I’ve been in the United States for 15 years,” another Dreamer told us. “I now share custody of my one-year-old daughter who is a U.S. citizen. I am lucky to be eligible to renew my DACA and very thankful to organizations like PICC for helping relieve some of the costs.”

This demonstration of collective activism exemplifies Pennsylvanians’ dedication to the greater good of our state. By pooling together our resources, we’re able to provide ongoing support to immigrants in need.
$69,000 RAISED

impactful partnership

financial relief

immigrant support

230 DONORS
ACCELERATORS

We are committed to continually setting and raising the standards of philanthropic performance and integrity for ourselves and our partners. As an impact multiplier, we remain committed to driving social and financial returns that you can see, feel and measure.
GERRY LENFEST’S INSTITUTE FOR JOURNALISM: IN HONOR OF A LEGEND

Cable television entrepreneur Gerry Lenfest understood the importance of the truth.

In 2016, he worked with the Philadelphia Foundation to gift an initial endowment of $20 million for The Lenfest Institute for Journalism, a nonprofit organization whose sole mission is to build sustainable business models for local journalism. In May 2017, he doubled down on this commitment, literally, by committing an additional $40 million matching gift, which has since generated $27.3 million from a broad array of national and regional funders.

While Gerry may no longer be physically with us, his legacy will live on through the many gifts he left our great region. To the community, Gerry will be remembered for his generosity, compassion and philanthropic spirit. At the Philadelphia Foundation, he will always be honored as a close friend, supporter and the ultimate accelerator of good.

MEL HEIFETZ’S $16M+ GIFT FOR LGBTQ CAUSES

More than 50 years ago, Mel Heifetz made a promise to himself that if he one day became successful, he would give back to the community that helped shape him.

In 2017, he gave $16 million of his fortune to expand the GLBT Fund of America, an endowed Donor Advised Fund at the Philadelphia Foundation. The fund, established by Heifetz in 2007, focuses on advancing the GLBT community in such areas as civil rights, social justice, and health needs.

LGBTQ YOUTH HOUSING PARTNERSHIP WITH PROJECT HOME

Too many young members of Philadelphia’s LGBTQ community end up homeless.

In fact, homelessness among young adults is on the rise, and over 40 percent of homeless youth identify as LGBTQ. The Philadelphia Foundation committed $100,000 in partnership with Project HOME to catalyze support for LGBTQ-friendly specialized housing services for young adults between the ages of 18 and 23. In addition to providing these individuals a place to live, the Gloria Casarez residence will offer supportive programs emphasizing education, employment, and life skills.

YOUTHADELPHIA’S TEEN LEADERS

Our city’s future will be defined by the youth of today.

This is why it’s critical to nurture civic and philanthropic engagement in the next generation. That’s the mission of YOUTHadelphia, a program supported through the Philadelphia Foundation’s Fund for Children. It gives local teens the opportunity to examine the city’s needs and work together to distribute $50,000 in grants to Philadelphia-area nonprofits. The 2017 grants were awarded to organizations addressing racism and minority empowerment, mental health, immigration, youth violence, and teen incarceration. This marked the 13th year YOUTHadelphia grants have been distributed to worthy causes around the city.

PHOTOS

A Philadelphia Foundation President & CEO Pedro Ramos addresses the 2017 YOUTHadelphia celebration

B Marguerite and Gerry Lenfest accept the Carnegie Medal of Philanthropy

C Sister Mary Scullion speaks with the media about our partnership with Project HOME
Mel Heifetz abides by the mantra that “life is not a dress rehearsal.” To Mel, these words mean not hesitating to take action and help others.

In 2017, Mel made one of his largest gestures to deliver on this promise with a $16+ million endowed gift to the Philadelphia Foundation to support LGBTQ-serving organizations.

Mel is far from new to the charitable landscape in Philadelphia. As a 20-year-old growing up in South Philadelphia, he made a promise to himself to give back to the community that helped raise him. Today, he’s known across the country for his support of gay and civil rights and was instrumental in providing early philanthropic support to address the problem of LGBTQ youth homelessness in Philadelphia.

Now a successful entrepreneur and real estate investor, Mel funded the $16+ million donation through the liquidation of a number of his investment properties across the city. The donation expanded the GLBT Fund of America, an endowed Donor Advised Fund established by Mel at the Philadelphia Foundation in 2007 to be used to support LGBT-related issues.

Mel isn’t done advocating for those in need and continues pounding the pavement for positive change throughout our great city. Instead of thanks, Mel encourages everyone with the means to do so to donate their time, money and efforts toward a good cause.

Mel’s relentless charitability aligns him so closely with the Philadelphia Foundation’s dedication to enacting positive change in our local communities. We’re proud to have worked with Mel for over a decade and we are excited to see what we can do together in years to come.

“Mel encourages anyone with the means to do so to donate their time, money and efforts.”
10 years of giving to:

- LGBTQ-serving organizations
- Youth homelessness
- Civil rights
AT-A-GLANCE

Thanks to an outpouring of community generosity, we ended 2017 with $494 million in consolidated assets, up 18.5% from the previous year.

958 active funds
including
633 endowed funds

$373M endowed assets

76% of assets are endowed and will provide charitable support to Greater Philadelphia nonprofits forever

2,118 individuals, families, companies and organizations generously contributed

$57,119,205 to the Philadelphia Foundation in 2017
Thank you to our 2017 Board of Managers

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Thank you to our 2017 Board Committee Volunteers

Stacy Maria Dutton, David Gruber, Farah Jimenez, William B.
McLaughlin, Handsel B. Minyard, Asuka Nakahara, Sangeeta
Prasad, Emily C. Riley

The Philadelphia Foundation exercises prudent investment practices that are oriented toward a “total return” strategy of investing. This strategy allows participation in rising markets while providing reasonable protection in falling markets.

Detailed financial statements are available on our website.
This great work would not be possible without you — the people who make our work possible. On behalf of our President and CEO, board members and staff, we are eternally grateful.

We’d like to take the time to thank our entire army of DOers:

**The engaged citizens** who remain passionate about our region’s well-being

**The donors** who allow us to co-create their legacy of giving

**The grantees** who take dollars and cents and turn them into meaningful change in our world

**The professional advisors** who collaborate with us to best serve their clients

**The partners** who share our vision and help us develop creative ways to pursue it

As the Philadelphia Foundation moves into its second century of bettering the Greater Philadelphia region, we will work to deliver on the following key strategies:

**Be** a “turn to” resource offering deep knowledge and creative solutions to address community needs and opportunities

**Seek** positive community impact through asset growth and smart grantmaking

**Identify** and advance civic initiatives through leadership, partnership and collaboration

**Assure** that the Philadelphia Foundation has the finances, talent, and business operations required to achieve and sustain our community’s aspirations