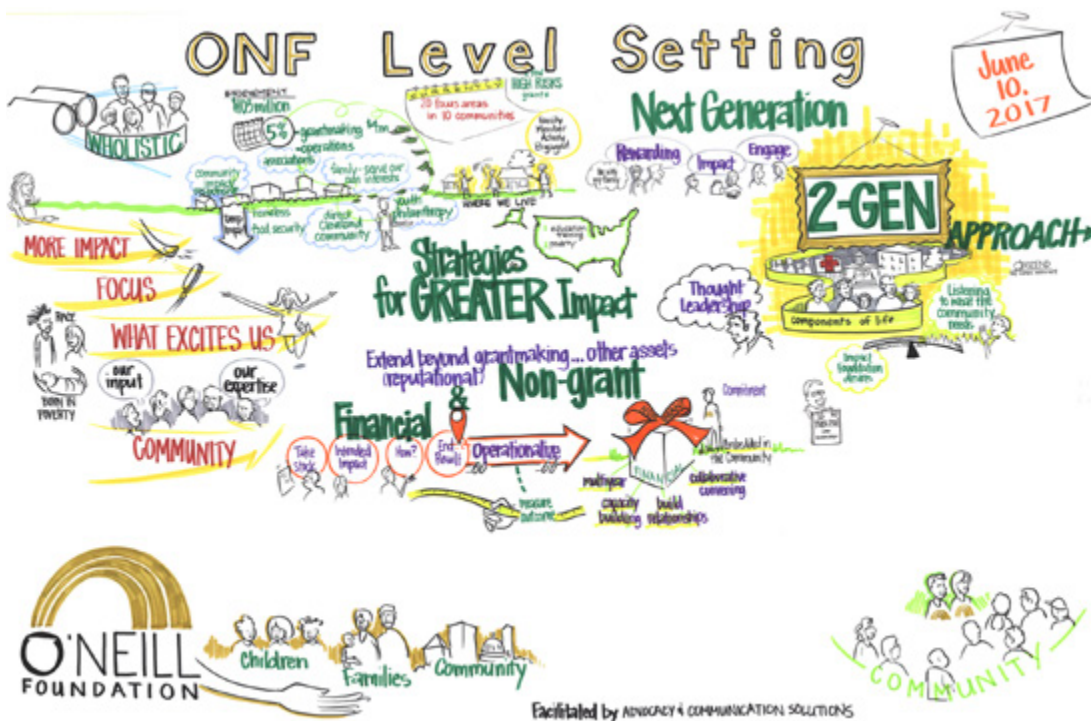


WILLIAM J. AND DOROTHY K



2017

ANNUAL REPORT



Family Engagement

- iii Set aside pool for next gen **yes**
- iii move to more deep impact (DIG) **yes** & few responsive grants
- iii how many engagement options required for geo. location to participate in D.I.G. **3**
- iii how many options required for geo. location to participate in Community Responsive **3**
- iii how many yrs. commit to living in a community prior to grant making **DIG 3 Comm. Resp. 3**

Photo credit: Graphic Artist's Illustration, 2017 Family Gathering

Dear O'Neill Family Members,

In 2017, the William J. and Dorothy K. O'Neill Foundation:

- Convened 31 O'Neill family members to identify the Foundation's priority areas and revisit approaches to family engagement.
- Re-affirmed its long-standing commitment to strengthen families and improve communities in which O'Neill family members live.
- Streamlined grant processes and shortened grant applications.
- Provided critical support to the Hurricane Harvey Relief Fund.
- Conducted youth philanthropy site visits in 2 communities and engaged some of the youngest O'Neill family members.
- Made 90 responsive grants to organizations located across 7 communities.

Clearly, this work is important – and it matters to many.

As always, we thank you and our many partners for supporting us – as we seek to build strong communities where families thrive.

Thank you for reading!

Leslie Perkul

Leslie Perkul
President & CEO



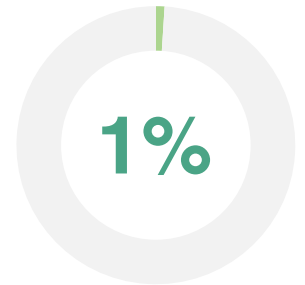
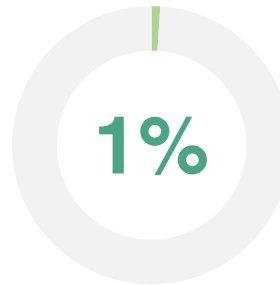
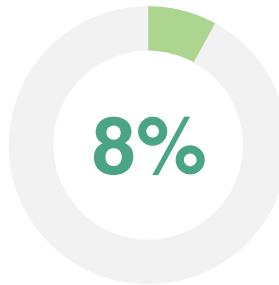
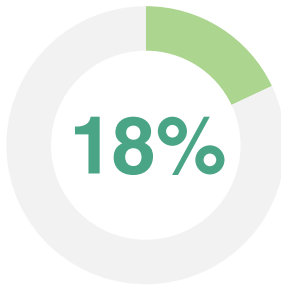
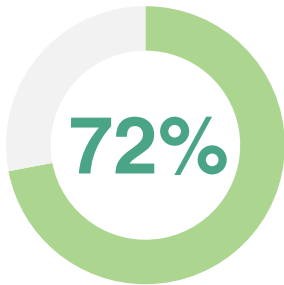


2017 Grantmaking History

TOTAL ENDOWMENT SIZE
\$113.8M

RESPONSIVE GRANTS AWARDED
\$2.71M | **90**

Types of Grants Awarded



COMMUNITY RESPONSIVE

Through two open grant cycles, proposals were reviewed and recommended by grant committees.

FAMILY DIRECTED

Family members received funding allocations to make grants to organizations of their choice.

PROACTIVE DEEP IMPACT

The Trustees approved one \$300,000 grant, payable over 2-years. Grants were selected using a Request for Proposal process.

YOUTH

Through one closed grant cycle, proposals were reviewed and recommended by family members under 18.

ASSOCIATION

Grants were awarded to various regional and national philanthropic support organizations.

2017 Grantmaking Locations



Washington, DC
limited to DC proper



Florida
Greater Orlando, Naples



Hawaii
Big Island



New York City
Brooklyn, The Bronx, Manhattan, Queens, Staten Island



Maryland
Baltimore City, Annapolis, Anne Arundel County



Ohio
Cleveland (Cuyahoga County), Columbus



Texas
Austin, Houston

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Photo (top & bottom) credit:
Santa Maria Hostel



Photo credit: INCLUDEnyc

Grant Summaries

Recognizing that families come in all different shapes and sizes, we hope you'll join us in celebrating the work of the Foundation's grantee partners.

Responsive Grantmaking was the largest grantmaking program for the Foundation in 2017 and this Annual Report highlights how a few grantee partners are working to serve and strengthen families.

In 2017, responsive grants were used to:

- **Support Organizational Infrastructure** | Through capacity building grants the Foundation has helped organizations fund new technology, including: hardware, software, and the development of new websites. While this work may not seem as exciting as supporting a

specific program, it's critically important to equip organizations so that they can better serve families.

- **Pilot New Programs** | Sometimes a relatively small grant is used to launch a whole new program resulting in some "aha!" moments for the organization.
- **Support Existing Programs** | Learning about an organization's progress year after year can be informative and inspiring. Sometimes a grant can help an organization take their project to the next level.
- **Provide General Operating Support** | Typically for small organizations, this funding helps with the day-to-day costs of running an organization.

WASHINGTON, DC

College Success Foundation

Piloting a New Program

Since 2006, College Success Foundation-District of Columbia (CSF-DC) has been working to break cycles of poverty by ensuring students have the resources necessary to complete high school, graduate from college, and secure meaningful employment. CSF-DC serves low-income (84%) and students of color (99%), the vast majority which are from DC's most underserved and disadvantaged neighborhoods, who will be the first in their families to attend college.

With support from the William J. and Dorothy K. O'Neill Foundation, CSF-DC implemented the College Success Foundation's Parent University, a community outreach and parent education initiative. With monthly sessions, Parent University's programming makes it convenient for students and parents to learn about college admissions, financial aid, scholarships and college "match and fit" processes. Parent University provides the setting for community services agency representatives, health professionals, financial services, employment and education experts to inform and educate families on the resources and programs that are available to those with unique circumstances.

By the third monthly session, Parent University program attendance went from a low of 10 to an average attendance of 40 plus families. At the November meeting, program attendance reached a record high with 63 individual families attending.

Monthly sessions coupled with the Parent University Coordinator's efforts to engage parents individually have established a sense of confidence among families, and parents have begun to more freely discuss issues of concern unrelated to the students. To date, CSF-DC received requests for support with continuing education assistance, student loan forbearance/forgiveness, credit recovery and repair, and financial aid support for both the parent and the student.

CSF-DC believes that increased positive parental involvement will continue to strengthen student support systems, which play a critical role in long-term student success.



CLEVELAND, OH

Family Promise of Greater Cleveland

Supporting Organizational Infrastructure

Since 2011 Family Promise of Greater Cleveland (Family Promise) has been providing a safe place to sleep and an array of supportive services for 21% of the Greater Cleveland area's homeless families. The agency is passionate about helping homeless families achieve and maintain permanent housing.

Over 80% of the families served by Family Promise are headed by a single mother, and approximately 60% of the families served are headed by young parents between the ages of 18-27. These parents have unique barriers to housing stabilization, such as unaddressed health issues, a lack of life skills, no work experience and no high school degree.

While at Family Promise, case managers conduct assessments of each family's needs, benefits eligibility, life skills level, child care options and more, then assist the parents in finding housing; securing a source of income; and linking to needed medical and legal services. Once families have been placed in permanent housing, the Community-Based Services Program provides families with a minimum of four months of follow-up support.



Funding from the William J. and Dorothy K. O'Neill Foundation was used to assist in sustaining Family Promise's operations and supporting its day-to-day efforts of helping homeless families. **The foundation's support was especially critical as the agency engaged in an extensive shelter renovation to locate all of its services on one site to better serve an increasing number of clients.**

Throughout the grant term, staff learned that the young families need more innovative and intensive services to address their unique challenges and maximize the potential for both parents and children to lead productive, satisfying and healthy lives in the community.



NEW YORK, NY

INCLUDEnyc

Supporting Organizational Infrastructure

Too often, youth with disabilities face societal stigma and seemingly insurmountable life challenges. These young people and families may be disconnected from traditional supports, and have difficulty navigating the complex systems intended to address such crucial issues as education, health care, benefits, and employment.

Over the past several years, INCLUDEnyc has had great success developing new programs (such as a multi-lingual Help Line, onsite assistance, workshops, and webinars) and enhancing services that give families the knowledge, confidence, and skills needed to advocate for their child with disabilities.

With funding from the William J. and Dorothy K. O'Neill Foundation to support the Program Impact Initiative,

INCLUDEnyc increased their technical and institutional capacity to more effectively serve families of young people with disabilities.



GRANT HIGHLIGHTS

- Staff worked with a consultant to create a tiered service structure in Salesforce, deploying its resources more strategically and improving interactions with families.
- INCLUDEnyc developed a simpler, more straightforward registration process for its workshop attendees. By capturing the information of family members who registered for workshops, but were unable to attend, INCLUDEnyc can now proactively reach out to provide them with information about future workshops and/or topics of interest.
- With the implementation of a new marketing automation program, INCLUDEnyc is monitoring user activity on their website, sending welcome emails to new clients, and sending customized email communications to its constituents – all in an attempt to become a more proactive organization.
- INCLUDEnyc used a relationship mapping software to identify more than 200 new donor prospects. Already, INCLUDEnyc increased individual giving by 26 percent. Similarly, institutional revenue increased by 35%, including the organization's first-ever corporate grants (totaling \$44,000).



HOUSTON, TX

Santa Maria Hostel

Supporting an Existing Program

Since the mid-1950s, Santa Maria Hostel (Santa Maria) has been providing comprehensive care to women and families. The majority of their clients have histories of trauma, incarceration, Children's Protective Services involvement, and homelessness or housing instability.

Santa Maria's Hope Housing Project began in 2005 and continues to provide vital and life-changing services such as case management, parenting education and coaching, education and employment services, child care, transportation assistance, and more to assist participants in transitioning from homelessness to self-sufficiency, long term recovery, and permanent housing.

With funding from the William J. and Dorothy K. O'Neill Foundation, 142 participants were served, including 83 women and 59 children. In addition to providing stable housing and comprehensive services, the Hope Housing Project offered 24/7 security monitoring so clients would feel safe and focus on building a foundation to self-sufficiency.



GRANT HIGHLIGHTS

- Over 83% of families moved to permanent housing upon completion of the program.
- Nearly 63% gained or increased their earned income (employment) by the time they exited the program.
- 83% of women with substance use disorders successfully completed outpatient treatment services, while 85% engaged in recovery support services to build social and emotional capital to sustain their recovery.
- 14 children, previously in CPS custody, were reunited with their mothers.

ORLANDO, FL

United Against Poverty

Piloting a New Program

United Against Poverty (UP) Orlando is a multi-service organization that started as a unique Member Share Grocery Program, which offered highly discounted food (with a 63% discount on average). The grocery's popularity quickly grew and, as traffic to the campus increased, clients expressed a need to have additional services available on-site. Today, UP's services include crisis care, case management, counseling, a medical clinic, domestic abuse advocacy, educational opportunities, specialty skills training, and job placement.

Since October of 2013, UP has been one of the few organizations to offer a monthly Family Volunteer Night, an opportunity for the entire family to volunteer together. Building upon the program's success, UP proposed to expand the program to add services from occupational therapists, physical therapists and licensed clinical social workers, so that UP could work with the entire family including children and adults with special needs.



The pilot project was launched in February 2018 and grew from having no families with special abilities the first month, to having an average of 30 families each month by December 2018. **UP learned much about how to offer services to families with members experiencing a variety of challenges from severe mental illness, autism, sight impairment, downs syndrome, and cerebral palsy.** Each of these groups needed specific volunteer projects that would meet their abilities, while still promoting family cohesiveness and the opportunity for the whole family to volunteer together.

UP's Executive Director, Eric Gray, spoke about the expanded Family Volunteer Night on the local news in October 2018 and referenced the William J. and Dorothy K. O'Neill Foundation as the funder of the program!



Listen to what Eric had to say >

<https://bit.ly/2Ggl69J>

ANNE ARUNDEL COUNTY, MD

United Way of Central Maryland

Supporting an Existing Program

United Way of Central Maryland (United Way) is a nonprofit organization dedicated to helping impoverished individuals and families meet their basic needs and achieve self-sufficiency. More recently, United Way moved beyond its traditional fundraising and grantmaking efforts to create impact through direct-service initiatives that support family stability in high need communities.

Launched in 2012, United Way's Homelessness Prevention Program prevents family homelessness and reduces student mobility through a two generational approach that provides intensive case management, flexible financial assistance, financial education, and workforce development support.

In response to the great need for family stability support in Anne Arundel County, United Way and its partner, the Anne Arundel County Partnership for Children, Youth and Families, found resources to hire a part-time Case Manager and serve a caseload of 10 families. Funding from the William J. and Dorothy K. O'Neill Foundation provided resources to expand the program site and increase the Case Manager's capacity to manage a caseload of 20 families.

At the start of the grant period, there were 6 families actively engaged in the program. **By the end of the grant period, 29 families were served, all of which remained housed while in the program.** Of those that participated, 15 families successfully completed the program and all of the 54 children avoided a disruptive school transfer.

Case Managers identified service gaps such as a lack of available mentors/mentoring programs, lack of affordable child care, and a lack of affordable, healthy food options. As part of their support, Case Managers are also connecting families to local partners providing other services and resources in the region.



KAILUA KONA, HI

West Hawaii Community Health Center

Supporting an Existing Program

West Hawaii Community Health Center (WHCHC) is a leader in delivering high-quality, comprehensive health care to approximately 14,000 clients on the Big Island of Hawaii. Its beneficiaries experience various health disparities due to issues such as economic insecurity, food insecurity, language barriers, health literacy, and lack of affordable and accessible healthy foods. As a result, there's been a rise in obesity and hunger touching a disproportionate number of West Hawaii's low-income population and people of color.

Initially, WHCHC had planned to hire two part-time community health workers to oversee two affordable housing sites, refer families to resources, conduct health screenings, teach families about healthy lifestyles, and provide innovative and culturally-relevant family engagement events.

With funding from the William J. and Dorothy K. O'Neill Foundation, WHCHC instead hired one part-time community health worker and organized monthly family-centric programs including: movie screenings, poetry sessions, programming for English Language Learners, vision and health screenings, and fitness and wellness classes.



By hiring candidates from within the affordable housing sites, WHCHC mobilizes community health workers with an intimate understanding of the strengths, barriers, and hardships faced by families. The community health workers are a familiar face for residents and therefore, easily navigate cultural barriers, help eliminate issues of mistrust, reach out to friends and neighbors, and translate health intervention messages for families.



Strong communities where families thrive



William J. and Dorothy K. O'Neill Foundation

www.oneill-foundation.org



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