

O'Neill Foundation

William J. & Dorothy K.



June 2020

Front Cover Image: A family served by ONF's 2020 (Cycle 1) grantee, Habitat for Humanity of Seminole County & Greater Apopka (FL).

Leadership

Trustees

Bob Donahey, Chair
Laura Bower
Linda France Clifford
David Donahey, Treasurer
Tim O'Neill, Secretary
Brian Sweeney
Mary France Walker
William J. O'Neill, Jr., Emeritus
Leslie Perkul, President & CEO

Committee 1

Cindy O'Neill, Chair
David Donahey
Kevin McShane
Kelly Sweeney McShane
John O'Neill
Maureen O'Neill
Tim O'Neill

Committee 3

Laura Bower, Chair
Linda Clifford
Bob Donahey
Will Donahey
Connie Bowen
George Korzensky
Katy Marcus
Kim Polo
Meg Sweeney
Molly Sweeney

Investment Committee

David Donahey, Chair
Bob Donahey
Tim O'Neill
Will Donahey, Observer

NextGen/Youth Grantmaking Committees

There are no structured committees. Involvement is open to those that are interested.

2Gen/DIG Committee

David Donahey, Chair
Connie Bowen
Laura Bower
Linda Clifford
Bob Donahey
Will Donahey
George J. Korzensky
Kelly McShane
Katy Marcus
Bill O'Neill
Cindy O'Neill
Kathy O'Neill
John O'Neill
Maureen O'Neill
Tim O'Neill
Sara Sullivan
Brian Sweeney
Molly Sweeney

NextGen Advisory Committee

Brian Sweeney, Chair
Sara Sullivan
Maureen O'Neill

Staff

Marlene Corrado, Program Officer, Communications & NextGen Engagement
Marci Lu, Senior Program Officer
Kara McCullough, Grants Manager
Leslie Perkul, President & CEO
Lisytt Stallworth, Office Operations Coordinator

Our Mission: To partner with nonprofits to improve the quality of life for families and communities, in places where O'Neill family members live.

Our Vision: Strong communities where families thrive.

Letter from the Chair



This past week, the Trustees were joined by the Nonprofit Finance Fund's CEO, Antony Bugg Levine.

[In this recording \[22:46 minutes\], you'll hear Antony speak about how nonprofit organizations are demonstrating resilience and creativity during these times of crisis.](#)

Antony reminded us that many of our grantees are suffering.

However, they're still doing amazing things – in some cases, within 48 hours – to transform how they're able to deliver services.



For those that are interested, the Nonprofit Finance Fund (NFF) conducted a brief survey of nonprofit leaders.

NFF's data might help us think about how we can respond to the COVID-19 crisis, recover, and build resilience as our communities move forward.

[You can read the full report here >](#)

During the Trustee meeting, we also discussed racial equity – what it means for our work, our grantees, our communities, and families.

This may seem like the beginning of our learning journey, but it's not the first time that we've asked ourselves these questions. It won't be the last.

Before the meeting, we read several articles that suggested ways for foundations to more intentionally address racial equity in their grantmaking.

Here are a few of the resources that the staff shared with us:

- [Race, Equity, and Unavoidable Challenges for Philanthropy](#)
- [Racial Equity and Philanthropy: Disparities in Funding for Leaders of Color Leave Impact on the Table](#)

Like many of you, I have a lot of questions. But, I have a feeling that we'll begin to figure it out.

Finally, the Trustees made some changes to the policies around our family directed giving program. A full outline of these changes can be found on pages 3 - 4 of this newsletter.

Please contact your family branch representative or staff, if you have any questions regarding the changes.

Bob Donahey, Chair



Letter from the CEO

Before COVID-19, we were envisioning 2020 to be a year of deep, community learning. There would have been in-person gatherings – across ONF’s many communities – to bring O’Neill family members, staff, and ONF grantees together.

Then, the world changed.

And our intentions – to engage O’Neill family members in this work, strengthen community connections, and listen to grantee partners – are more important than ever before.

The same holds true for ONF’s vision and mission:

Mission: To partner with nonprofits to improve the quality of life for families and communities, in places where O’Neill family members live

Vision: Strong communities where families thrive

It may seem strange for us not to be in communities this year, but we will continue to engage virtually and adjust our roadmap as we go.

We look forward to sharing updates with you.

[Click HERE to access the 2018 Annual Report!](#)

We hope you will be as proud of the Foundation’s work, just as we are to work with all of you.

As always, if you have any questions or wish to receive more information, please do not hesitate to contact me.

Leslie Perkul, President & CEO



A Perfect Time to Think About Family Directed Giving

Family Directed Giving requests are due to Kara McCullough (kmccullough@oneill-foundation.org) no later than November 30, 2020.

[DOWNLOAD THE FORM](#)

The Trustees Approved Changes to the Family Directed Giving Program.

2020 Programs	Your Age	Available Funds* <i>No match is required.</i>	Available (1:1) Matching Funds*
Family Directed Giving	+ 31	\$5,000	\$10,000
	26 – 30	\$3,000	\$1,000
	21 – 25	\$2,000	-
	18 – 20	\$1,000	-
	13 – 17	\$750	-
Birthday Card	0 – 20 <i>In 2021, this will change to youth, ages 0-12.</i>	\$100	-

**Total to be allocated per couple.*

Family Directed Giving funds (both matched and unmatched) cannot be carried over.

The Foundation's available funds (both matched and unmatched) will reset each calendar year. Family members cannot hold onto their allocation to spend in future years. If you have questions, please contact Kara McCullough (kmccullough@oneill-foundation.org).

How to Carry-over your Personal Match with Stock Donations:

Once fully matched (\$10,000), the remaining funds must exceed \$500.

Example: A family member donates stock shares that are valued at \$10,105. The remaining \$105 cannot be carried over. However, the family member can designate a grant that will include that additional \$105 for a total of \$20,105. (\$10,105 from the family member + \$10,000 from the Foundation).

Example 2: A family member donates stock shares that are valued at \$10,750. The additional \$750 can be designated in the current year or can be held over to the next year, necessitating a donation of only \$9,250 to meet the \$10,000 match the following year.

Carry-over amounts must be spent within 2 years.

Example: A family member donates stock valued at \$40,000 in 2020. They designate their \$10,000 match for 2020 and can carry over \$30,000 to meet their match for 2021 and 2022. Anything not designated by 2022 will not be carried over into the following year.

What if a Stock Donation is less than the \$10,000 matching allocation?

If the amount is within \$200, the foundation will match the full \$10,000; however, if the value is less than \$9,800 the family member will need to provide either a) the additional funds in cash to make up the full value or b) designate an amount less than \$10,000 to meet the 1:1 match.

Family Directed Giving for Surviving Spouses (Related by Marriage):

In the case of death of an O'Neill family member (direct lineage), the surviving spouse may continue with the directed giving program under current guidelines; provided that they were still legally married at the time of their spouse's death. If the surviving spouse remarries, he/she will still be eligible to participate in the directed giving program; however, the new spouse and any children brought into the marriage are not eligible to participate in directed giving.

Family Directed Giving for Step Children:

Any O'Neill family member (direct lineage) who marries someone with children from a previous marriage can include those children in the directed giving program. In the event that the marriage was to end in divorce, the step-children would be welcome to continue with their own participation in the directed giving program if they so choose; however, their children would not be eligible to participate.

Responsive Grantmaking: Trustees Approved \$1.1M

Two months ahead of schedule, the Responsive Grantmaking Committees expedited their first cycle in 2020 and approved \$1.1M in general operating support grants to 34 nonprofit organizations.

[View the full list of the approved grants >](#)

The NextGen's Learnings: COVID-19, Housing, and Homelessness

How is COVID-19 impacting people experiencing homelessness? What about people of color or people from marginalized communities? How are other funders responding during these challenging times?

[Funders Together to End Homelessness'](#) Chief Executive Officer, Amanda Andere answered some of these questions.



[Listen to the recording \[23:59 minutes\] >](#)

Resources:

[Funders Together's Summary of the Coronavirus Aid Packages](#)



Towards Employment
@TowardsEmploy

So honored to be in the room at @TheCityClub with so many Clevelanders and CLE organizations determined to create awesome opportunities and success for all generations. Shifting Mindsets: The Promise of a Two-Generation Approach



12:35 PM · Feb 27, 2020 · Twitter for iPhone



(Pictured above: ONF 2Gen/DIG grantee, Towards Employment, attended the City Club program.)

Shifting Mindsets: The Promise of a Two-Generation Approach

Back in February (pre-COVID), Anne Mosle, Vice President at the Aspen Institute and Executive Director of Ascend, spoke at the City Club of Cleveland.

Her speech highlighted the national momentum around serving families holistically and was a part of the "Resilient Families" series sponsored by the William J. and Dorothy K. O'Neill Foundation and Saint Luke's Foundation, both Ascend Network Partners.

Hundreds attended, including a few of ONF's 2Gen/DIG grantee partners, and tuned into the prestigious City Club of Cleveland platform.

[Watch Anne's speech at the City Club of Cleveland >](#)



The North Star of what I have worked on for my whole life has been how do we ensure that opportunity, what has been core to the American spirit, that all families can reach their full potential, can be passed on from one generation to the next.

– Anne Mosle, Vice President at the Aspen Institute & Executive Director of Ascend



Child Care for Working Parents Should be a Centerpiece of Ohio’s Reopening

Back in April, Anne Mosle, Vice President at the Aspen Institute and Executive Director of Ascend, wrote a letter to the editor of Cleveland.com imploring the Ohio State Governor to prioritize child care for working parents during the COVID-19 pandemic.

[Read Anne's letter to the editor >](#)



Children and their families’ destinies are tied together: One cannot thrive while the other struggles. These parents are working jobs that often demand last-minute scheduling and don’t offer paid leave.

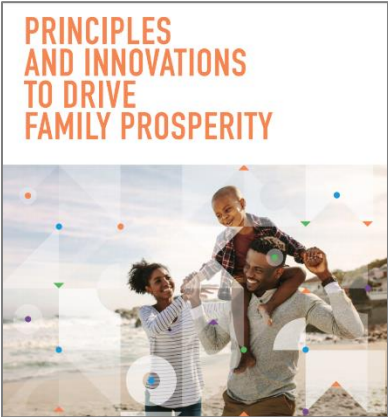
– Anne Mosle, Vice President at the Aspen Institute & Executive Director of Ascend

New Report: Principles and Innovations to Drive Family Prosperity

The last few weeks and months have been profoundly challenging, and illuminated the need for change in the way our country engages with and supports families.

In Ascend’s overarching efforts to help foster and scale up effective family-supportive policies, they partnered with experts to identify best-in-class thinking to address policy and practice on a wide range of issues, including: child care, health insurance and health care, employment benefits, and public programs.

[Read Ascend’s newest report >](#)



ONF's COVID-19 Rapid Response Funds

In April 2020, the Trustees approved a COVID-19 response, directing \$1 million to rapid response funds across our 8 communities.

Staff remain in-touch with the [Rapid Response Funds](#) that received funding.

[Learn about the resources that have been raised and allocated by the funds >](#)



Rapid Response Fund: [BRIDGES](#) | Big Island, HI

BRIDGES strengthens local agriculture production by purchasing locally grown food & flowers that are then donated to community organizations for distribution.

The "BRIDGES" concept was created by Hawaii County Councilman, Tim Richards (pictured upper right), in the early stages of the "stay at home order" for the COVID-19 pandemic. As a tireless advocate for agriculture and the community, Tim's vision was to keep the economy moving and help his community recover as quickly as possible.

“

I just wanted to say a HUGE MAHALO for the BRIDGES program. It is truly “saving the day” at The Food Basket and for the many residents we are serving daily... And the ranchers and farmers are so extremely grateful as well!

Our federal food supply chain has stalled – and may be at a long-time halt – and the majority of free food that we typically rely on from the USDA is not coming through, so the support from local agriculture is critical.”

– Kristin Frost Albrecht, Executive Director, The Food Basket

2020 IMPORTANT DATES

The following meetings will be open to all family members. Please contact the Foundation's staff to receive meeting materials and call instructions.

July

July 31 | Responsive Grantmaking Applications Due - **NEW**

July 8 | Responsive Grantmaking Webinar for Grantees - **NEW**

August

By August 28 | DIG Committee Meetings

September

September 14 | Trustee Meeting

October

By October 5 | RG Committee Meetings - **NEW**

November

November 30 | Family Directed Giving Deadline

December

December 14 | Trustee Meeting - **NEW**