

WILLIAM J. AND DOROTHY K.



FOUNDATION IN FOCUS

MAY 2018



Front Cover Images: 2017 Grantee (Cycle 2):

The Women's Home (TX)

It is the mission of the Foundation to partner with nonprofits to improve the quality of life for families and communities, in places where O'Neill family members live.

Leadership

Trustees

Kelly Sweeney McShane, Chair

David Donahey, Treasurer

Laura O'Neill Bower

Linda France Clifford

Bob Donahey

Tim O'Neill, Secretary

Leslie Perkul, President & CEO

Foundation Staff

Leslie Perkul, President & CEO

Symone McClain, Vice President

Marci Lu, Senior Program Officer

Marlene Corrado, Program Officer, Communications & NextGen Engagement

Letter from the CEO



After visiting all of the O'Neill Foundation grantmaking geographies throughout the past year, I have been thinking a lot about the similarities across our communities. **At the forefront of every discussion I had in each of these communities was one striking similarity – the challenge for family members to take care of one another and meet their basic needs, whether with grantee organizations, peer foundations, or other community stakeholders.**

There is a reporting tool that United Way Worldwide developed which is called ALICE. ALICE is an acronym for **A**sset **L**imited, **I**ncome **C**onstrained, and **E**mployed. ALICE is a hardworking member of the community who is employed yet does not earn enough to afford a bare-bones household budget of housing, child care, food, transportation, and health care. While there is not currently an ALICE report for every one of our communities there is information available for these communities: Hawaii Island, New York City, Cleveland/Cuyahoga County, Orlando, Baltimore and Anne Arundel County. Interestingly, while Cleveland has the highest poverty rate compared to each of these other communities (36%) that number increases to 46% if you include ALICE households. Conversely, Hawaii County has one of the lowest poverty rates at 15% but jumps up to 55% for ALICE households.

Through our responsive grantmaking, the new 2Gen strategy, and our NextGen grantmaking programs, we have a great opportunity to strengthen support for families in each of your communities. **I am pleased to share some of these stories through our 2016 Annual report that is accessible through the link below.**

Click **HERE** to access the 2016 Annual Report!

Speaking of communities, if your home community is not in our current list of eligible geographies and you have lived there for at least three years and would like to open it for grantmaking, please speak to your family branch Trustee. Then, I will be happy to discuss next steps for introducing our responsive grantmaking program in your community.

Happy Spring!

A handwritten signature in cursive script that reads "Leslie Perkul". The ink is dark and the signature is fluid and legible.

Leslie Perkul, President & CEO

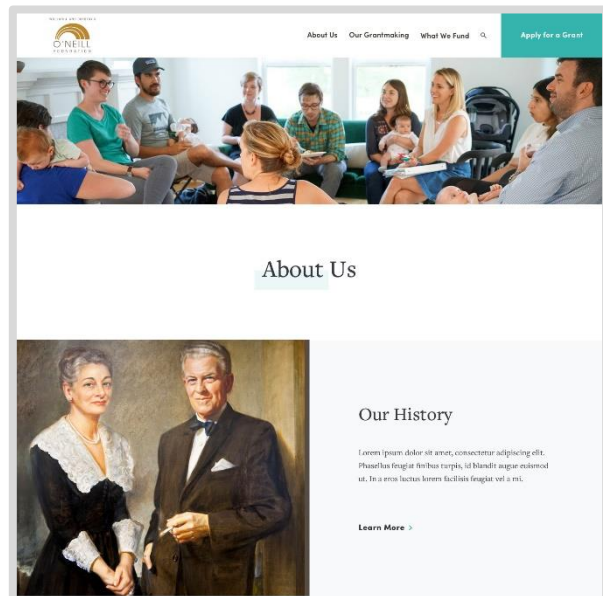
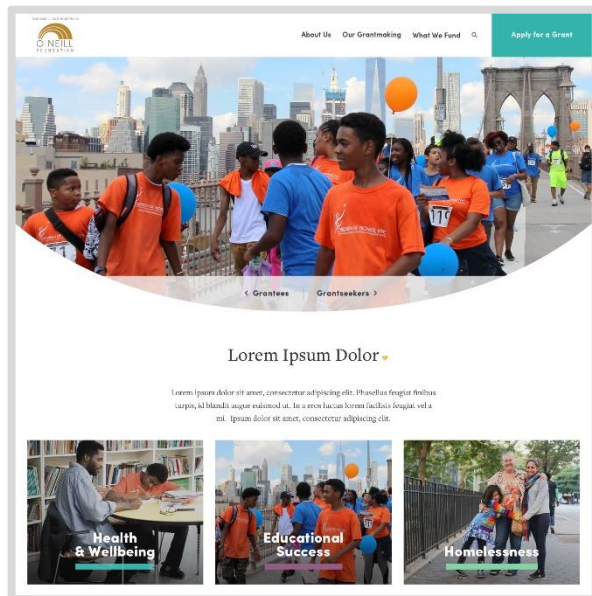
The Website's Fresh Look

We received feedback from (8) family members regarding the new website and we're excited to share the following mockups (homepage & about us page). The purpose of these mockups is to provide a look at the "visual" content of the website (ie: general design, layout, fonts, and colors).

In the next steps of our process, interested family members will be invited to review the website's updated content and images, experience the site, and let us know what else can be improved before "going live".

It's not too late to get involved!

Email mcorrado@oneill-foundation.org if you'd like to participate in the content review mid-May.



What's Next for the Logo?

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During the April Trustee meeting, a decision was made to move forward with a logo redesign.

We welcome your participation in the process which will begin upon completion of the website redesign.

Email mcorrado@oneill-foundation.org if you would like to be involved.

NEXTGEN UPDATES

KEY MOMENTS OF 2018

2 **NextGen Video Calls**
to develop the timeline and
grant application.

8 **Organizations applied.**
In-person and virtual site visits
are scheduled (May).

**AS A
NEXTGEN
FAMILY MEMBER,
YOU CAN
PARTICIPATE!**

Contact Marlene to learn more.

Opportunities include (but are not limited to):



NEXTGEN VOICES



A reflection piece written by Molly McShane

For almost two years now, I've been involved with Resource Generation, a group that organizes young people ages 18-35 with inherited wealth, high incomes, and/or family philanthropy vehicles.



ORGANIZES YOUNG PEOPLE WITH WEALTH AND CLASS PRIVILEGE IN THE US TO BECOME TRANSFORMATIVE LEADERS WORKING TOWARDS THE EQUITABLE DISTRIBUTION OF WEALTH, LAND AND POWER.

I stepped into leadership in the New York City chapter and help organize quarterly Family Philanthropy Dinners. At these dinners, young people get together to talk about our involvement in our family foundations or family's donor-advised funds - what types of issues we fund, how we fund them, and how we can support one another in encouraging our foundations to be as impactful as possible. **It has been a great space to connect with other young people with varying types of family philanthropy vehicles to talk about a subject that often feels isolating or confusing!**

In that context, I decided to attend Resource Generation's Transforming Philanthropy Conference this March in Pomona, California. The conference brought together young people involved in family philanthropy or who have high net wealth, as well as people in the money management world, nonprofits, community organizers, and staff at social justice funds and foundations. We talked about statistics around philanthropy - for example, we learned that if 1% of Planned Parenthood's funding went to women of color led organizations, it would currently eclipse all current funding to those organizations. We also learned that less than one third of 1% of global philanthropy goes to support indigenous or native causes. We also covered family fundraising, big check-writing, and money management!



...Embracing the simple joy of being in a relationship built on trust and compassion can help guide our philanthropy and make it a space of collaboration, autonomy, and systems change guided by the strength of the most underserved in our communities.

In one of the most resonant panels for me, we heard from Resource Generation members about how they've leveraged their privilege and resources to fund movements. For example, one individual talked about making a 0% interest loan to an immigrant justice organization in Arizona so that they could buy a small building to headquarter their work and serve as a community center. Another member talked about the process of organizing the Next Generation of his family foundation – much like we're in the process of doing!



Karen Pittelman (shown on the left, along with Limay Ho, center, executive director of Resource Generation, and Gabriel Foster, right, executive director of the Trans Justice Funding Project), a former Resource Generation member who co-authored the book “Creating Change Through Family Philanthropy: The Next Generation,” spoke about her experience starting the Trans Justice Funding Project then handing over decision-making power to transgender individuals from the communities the project funds. Karen’s workshop highlighted an important theme to the conference – **talking about money can feel hard, but it doesn’t have to be! While it is important to challenge ourselves to give boldly to fund amazing work, it is also important to center love and relationship and the joy of redistribution.**

Presenter Rajiv Khanna from Thousand Currents asked us to consider relationships with grantees like we consider relationships with family members or loved ones. Would we ask the same thing of loved ones we have relationships with that we do of our grantees? Ultimately, embracing the simple joy of being in a relationship built on trust and compassion can help guide our philanthropy and make it a space of collaboration, autonomy, and systems change guided by the strength of the most underserved in our communities.

Please feel free to reach out to me (mollymcshane80@gmail.com) with any questions about the Conference or Resource Generation; I’m happy to talk more about both with anyone and especially my younger cousins!

DEEP IMPACT GRANTMAKING

GOAL 1 ...

Better support grantees in implementing effective interventions designed to **break the cycle of multigenerational family poverty**.

GOAL 2 ...

Improve education and health and well-being outcomes for children and their parents/caregivers.

GOAL 3 ...

Advance 2Gen practices that contribute to the growing knowledge base in the field about this nascent model.

GOAL 4 ...

Increase O'Neill family engagement in the work of the Foundation and create a culture of learning with our grantee partners.

Progress to Date

JAN, 2018



- ✓ Communicated 2Gen strategy and DIG process with family members
- ✓ Ascend at the Aspen Institute presented a webinar on the 2Gen framework
- ✓ Engaged in learning opportunities with Ascend
- ✓ Explored an evaluation partnership

APR, 2018

- ✓ Conducted meetings with partners & potential 2Gen applicants in HI, NY, OH, MD

What's Next

- ✓ Invite organizations to apply for funding (early May)
- ✓ Applications due (mid-June)
- ✓ Site visits (June-July)
- ✓ DIG Committee meetings (August)
- ✓ Trustee Meeting to vote on DIG recommendations (Sept)
- ✓ 2Gen learning opportunity for Trustees and interested ONF family members (Sept)
- ✓ Attend 2Gen learning opportunities in partnership with grantees (Ongoing)



In Case You Missed It...

TWO GENERATIONS. ONE FUTURE.

On February 5th, O'Neill family members joined Ascend at the Aspen Institute for a webinar to discuss how 2Gen will apply to the Foundation's new strategy work.

[CHECK OUT THE RECORDING!](#)

2018 IMPORTANT DATES

JUNE

June 18 | O'Neill Foundation Trustee Meeting

SEPTEMBER

September 16 - 17 | O'Neill Foundation Trustee Meeting

DECEMBER

December 10 | O'Neill Foundation Trustee Meeting