Kathy and Karl Alexander have established a charitable fund at BCF that will involve their children in working to better the city they love.

The Importance of Schools and Neighborhoods

“I’m interested in education and communities,” says Karl, who recently retired as a research sociologist and chair of the Department of Sociology at the Johns Hopkins University. “BCF focuses on strengthening neighborhoods and building success through schools, and both are tremendously important for young people growing up—especially in places like Baltimore, where there are so many challenges to neighborhood life and maintaining an excellent school system. The Foundation is spot on in terms of its priorities.”

He should know. For 25 years, beginning in 1982, he and a colleague worked on a research study of 790 children in 20 Baltimore City public schools. “From first grade, we watched as they worked their way through the school system and into their young adult years, until they were in their late 20s,” he notes. “In two post-high school surveys, we interviewed 80 percent of the original group. I talked to the young people, their families, and their teachers along the way. We found what we expected: that getting off to a good start in school and having a good support system makes a huge difference.”

Their findings were published last year in a book, *The Long Shadow: Family Background, Disadvantaged Urban Youth, and the Transition to Adulthood*, which has garnered national attention. “At age 28,” he says, “just a little more than 4 percent of the low-income children had a bachelor’s degree compared to 45 percent of children from middle-class families—a gigantic, ten-fold disparity. But it’s not just income; it’s parent education level and emotional support at home. Middle class parents understand better than most low-income parents what it takes to succeed in school, and they provide a better support network along the way. The combination has the effect of moving children along very different school and life trajectories.”

Kathy and Karl Alexander are happy to be urban dwellers in a Fells Point condo after living in Baltimore County and then in a large townhouse. “I love Baltimore and grew up here,” says Kathy, publicity manager for the Johns Hopkins University Press. “Karl grew up in Philadelphia, so we’re both comfortable in the city and want to give back to the community.” The direction for their charitable giving has emerged from both personal experience and scholarly research, and it has become a vital focus in their lives.

The Baltimore Community Foundation Newsletter

IN & ON THE EDGE

2 VIEWPOINT: Baltimore’s Schools Strive to Be Green

BCF BEAT: Upcoming and Recent BCF Events

3 COMMUNITY INVESTMENT UPDATE: What Have We Done for Baltimore Lately?

UPDATE ON REI: What have we been doing lately to fulfill our commitment to race, equity and inclusion?

GUEST COLUMN: Safeguarding Your Estate Plan

4 WELCOME TO BCF: New Funds

5 BOARD UPDATE: Active Board Member Eurich Retires

MY LEGACY: Dave Roberts

CONVERSATION WITH TOM WILCOX

A Series of Conversations with Philanthropic Partners and Others

Vernon Wright and Mari Beth Moulton

An excerpt from a conversation between Tom Wilcox and Vernon Wright, founder and trustee, and Mari Beth Moulton, executive director–Baltimore of the Wright Family Foundation.

TOM WILCOX: Tell us about your family foundation – what made you decide to create a charitable foundation?

VERNON WRIGHT: My wife Lucy and I were talking about it in the late 1990s. We decided that we wanted to take some of the funds that we had earned over the years and help others.

TW: Many family foundations give very broadly. How did you come to establish a sharp focus on at-risk youth?

VW: My wife, in the 1960s, was a parole officer with the state of Maryland. The area she focused on was East Baltimore. We thought that it made sense to focus on the inner city of Baltimore, and we looked at the issues and the challenges that
By Cheryl Casciani, BCF Director of Neighborhood Sustainability

Baltimore’s Schools Strive to Be Green

Karl and Kathy Alexander

THE BCF BEAT

Office of Engagement. When the 21st-Century Buildings Plan was adopted in 2012, it enabled school leaders to start working on estate planning. Their desire to give back to Baltimore led their legal advisor to suggest they open a charitable fund at BCF. “We are thrilled to be involved with BCF,” Kathy says. “We wanted to engage our children in philanthropy but didn’t know where to start.” Karl says, “Strengthening neighborhoods and building a sense of community identity and solidarity is a big deal. It helps tamp down predatory crime, and good neighbors look after one another’s children. Schools and neighborhoods are critically important to healthy development of young children, and the Foundation is focused on both. BCF is a good match for our interests and our charitable giving objectives.”

FAMILY PHILANTHROPY

Prior to Karl’s retirement, the Alexanders started working on estate planning. Their desire to give back to Baltimore led their legal advisor to suggest they open a charitable fund at BCF. “We are thrilled to be involved with BCF,” Kathy says. “We wanted to engage our children in philanthropy but didn’t know where to start.” Karl says, “Strengthening neighborhoods and building a sense of community identity and solidarity is a big deal. It helps tamp down predatory crime, and good neighbors look after one another’s children. Schools and neighborhoods are critically important to healthy development of young children, and the Foundation is focused on both. BCF is a good match for our interests and our charitable giving objectives.”

The researchers also looked at neighborhood profiles. “We learned that a low-income neighborhood isn’t necessarily a distressed neighborhood, and the difference is of monumental importance to young people,” Karl says. “Strengthening neighborhoods and building a sense of community identity and solidarity is a big deal. It helps tamp down predatory crime, and good neighbors look after one another’s children. Schools and neighborhoods are critically important to healthy development of young children, and the Foundation is focused on both. BCF is a good match for our interests and our charitable giving objectives.”

I don’t believe you should try to make policy unless you’re engaged with the people who are most affected by it—so if you’re working on sustainability policy in schools, you should start with the kids. My first involvement with environmental issues in schools started in 2010, when BCF had some grant funds related to the Cleaner Greener Baltimore campaign. People were asking how to get kids involved, and we created a simple grants program in partnership with Baltimore’s Office of Sustainability.

We asked kids to form teams and propose a green project—and each year, we saw more demand, from 16 proposals to more than 50 $1,000 grants per year, involving 114 schools so far. In 2014, student “Green Teams” planted trees, created schoolyard and community gardens, distributed recycling bins and green cleaning kits, installed environmental art, held fairs and poster contests, painted storm drains, cleaned neighborhoods, and more. In addition, 22 schools have successfully completed a rigorous, two-year process for green certification from the Maryland Association of Environment and Outdoor Education.

My work at the Community Foundation supports Baltimore’s Sustainability Plan, which includes a goal to make all city schools green through environmental education, healthy food, green buildings, energy conservation, and partnerships with green organizations. With growing demand from the kids, we started to ask more from the adults. There was already participation from external private and nonprofit partners—Constellation Energy, Enterprise Foundation, Parks and People, Blue Water Baltimore, Chesapeake Bay Foundation, and others—who recognized that the city schools needed additional resources for environmental purposes.

BCF is leveraging resources to build momentum and results, including partially funding a Green Schools Coordinator who sits in the city schools’ Office of Engagement. When the 21st-Century Buildings Plan was approved by the state legislature in 2012, it enabled school leaders to start thinking about large-scale environmental impact in buildings, building systems, and school grounds. The Green Schools Coordinator was there to facilitate work by the kids, the school system leadership, and external partners.

What began as a handful of small grants to students has led to the potential for a school system-wide sustainability policy. Such a policy would integrate environmental literacy into the curriculum, focus on sustainable new construction and cleaning products, provide healthier food, reduce energy consumption, and improve indoor air quality. With my appointment to the Baltimore City School Board in 2013, I now have a role where I can help advance that policy.

"Green Teams" in schools across Baltimore are spreading sustainable practices to their families and communities.

My work at the Community Foundation supports Baltimore’s Sustainability Plan, which includes a goal to make all city schools green through environmental education, healthy food, green buildings, energy conservation, and partnerships with green organizations. With growing demand from the kids, we started to ask more from the adults. There was already participation from external private and nonprofit partners—Constellation Energy, Enterprise Foundation, Parks and People, Blue Water Baltimore, Chesapeake Bay Foundation, and others—who recognized that the city schools needed additional resources for environmental purposes.

BCF is leveraging resources to build momentum and results, including partially funding a Green Schools Coordinator who sits in the city schools’ Office of Engagement. When the 21st-Century Buildings Plan was approved by the state legislature in 2012, it enabled school leaders to start thinking about large-scale environmental impact in buildings, building systems, and school grounds. The Green Schools Coordinator was there to facilitate work by the kids, the school system leadership, and external partners.

What began as a handful of small grants to students has led to the potential for a school system-wide sustainability policy. Such a policy would integrate environmental literacy into the curriculum, focus on sustainable new construction and cleaning products, provide healthier food, reduce energy consumption, and improve indoor air quality. With my appointment to the Baltimore City School Board in 2013, I now have a role where I can help advance that policy.

"Green Teams" in schools across Baltimore are spreading sustainable practices to their families and communities.

My work at the Community Foundation supports Baltimore’s Sustainability Plan, which includes a goal to make all city schools green through environmental education, healthy food, green buildings, energy conservation, and partnerships with green organizations. With growing demand from the kids, we started to ask more from the adults. There was already participation from external private and nonprofit partners—Constellation Energy, Enterprise Foundation, Parks and People, Blue Water Baltimore, Chesapeake Bay Foundation, and others—who recognized that the city schools needed additional resources for environmental purposes.

BCF is leveraging resources to build momentum and results, including partially funding a Green Schools Coordinator who sits in the city schools’ Office of Engagement. When the 21st-Century Buildings Plan was approved by the state legislature in 2012, it enabled school leaders to start thinking about large-scale environmental impact in buildings, building systems, and school grounds. The Green Schools Coordinator was there to facilitate work by the kids, the school system leadership, and external partners.

What began as a handful of small grants to students has led to the potential for a school system-wide sustainability policy. Such a policy would integrate environmental literacy into the curriculum, focus on sustainable new construction and cleaning products, provide healthier food, reduce energy consumption, and improve indoor air quality. With my appointment to the Baltimore City School Board in 2013, I now have a role where I can help advance that policy.

"Green Teams" in schools across Baltimore are spreading sustainable practices to their families and communities.
What Have We Done For Baltimore Lately?

What have we done for Baltimore lately? Here’s a sampling of what our donors are helping us accomplish and what more we can do together:

SCHOOL READINESS
Judy Centers get children ready for school by connecting young children and their families to a host of educational, health and social services that help create the best environment for early learning. A federal grant awarded to the Maryland State Department of Education at the end of 2014 provided an immediate opportunity to match BCF donors’ commitments for funding that will open five additional Judy Centers in Baltimore City this year. Baltimore has already boosted school readiness from 28% in 2002 to 76% in 2014. With Judy Centers achieving 90% and greater school readiness rates, these five additional centers promise to make a significant difference in neighborhoods where school readiness has lagged. Thank you to the visionary donors who are giving the gift of opportunity to thousands of parents and children.

SCHOOL LEADERSHIP AND EFFECTIVENESS
Though it takes many ingredients to make an effective school, strong and capable leadership tops the list. Recognizing that what we had articulated as two areas of focus: school leadership and school effectiveness, are in reality closely intertwined, we are developing a single objective for both. We want all of our public school students to attend an effective school lead by an effective principal and taught by high quality teachers. Our staff and trustees are determining the best ways BCF can invest its funds and staff talent to support progress toward that ambitious goal.

In the meantime, we have continued to support use of the School Effectiveness Review (SER), the objective analytical tool used to measure schools’ individual progress. And we funded an analysis, conducted by an outside contractor, of City Schools’ principal support and accountability structures. The report found that support for principals was inconsistent, more differential professional development was needed for principals and their supervisors, and the role of the assistant principal needed clearer definition. BCF is working with City Schools to define ways to improve support for school leaders.

TARGET NEIGHBORHOOD: RESERVOIR HILL
In 2014, 400 residents donated more than 7,000 volunteer hours in Reservoir Hill. As a result of all their hard work, hundreds of trees have been planted, the Whitelock Community Farm has completed a major expansion, three out of four of the previously vacant lots in the neighborhood are now redeveloped, and residents are working with No Boundaries Coalition, New Lens and the Western and Central District Police to develop a community policing strategy that advocates for policy change.

TARGET NEIGHBORHOOD: GREATER HIGHLANDTOWN
Residents of Greater Highlandtown last year worked with schools and community organizations to convert 104,000 square feet—that’s 3.6 acres!—of abandoned lots, unused tree wells and neglected bus stops into beautiful, inviting public spaces.

GREEN HEALTHY SMART CHALLENGE
For five years running we have provided small grants to student “green teams” to carry out sustainability projects in their schools and communities. This spring, teams at 51 schools are participating. We believe that the best way to turn the tide on sustainability is to inspire young people take the lead, because they bring home what they’ve learned and, as activists, once they get hold of an issue they insist on action.
BCF’s Investment Committee Chair, Tedd Alexander.

Translating that commitment into action has required that we explore the topic forthrightly with our staff and volunteers, examine our own practices and thoughtfully consider how to extend what we have learned to our grant recipients and others. This is a summary of our most recent efforts.

INVESTMENT MANAGER DIVERSITY

The world of investment management has been slow to embrace racial diversity. BCF’s Investment Committee Chair Tedd Alexander, himself an African American investment manager, attests to the uphill climb and closed doors faced by investment managers of color. BCF has addressed this issue head-on. In 2013, the Board of Trustees approved an investment manager diversity policy that requires our investment consultant, Cambridge Associates LLC, to identify managers of color for consideration by our Investment Committee. We hosted a meeting of Baltimore area Cambridge clients last May, attended by the CEO of Cambridge, at which a frank discussion exposed some of the reasons for the entrenched bias within the world of investment consulting. BCF then helped push the issue to a larger stage, participating in a session on the topic at the international 2014 Fall Conference for Community Foundations. (Video of the October 2014 session is available at www.bcf.org/investments.)

In 2014 meetings of the BCF Learning Network focused on applying the backmapping approach and Racial Equity Impact Analysis tool to BCF school readiness and leadership strategies.

Specifically, in our target neighborhoods:

- BCF provided Race Matters Toolkit and Racial Equity Impact Analysis training sessions to Reservoir Hill and Highlandtown community partners, and retained diversity/inclusion consultants to facilitate the Reservoir Hill Improvement Council’s board retreat.
- BCF-sponsored REI trainings prompted neighborhood partners in Highlandtown to incorporate diversity/inclusion considerations in the development of community events, organizing efforts, and neighborhood planning groups.
- RHIC incorporated diversity/inclusion considerations in the process of revising its bylaws and governance policies.
- BCF provided funding for a facilitator to continue equity and inclusion conversations in Reservoir Hill focused on race and gentrification.

What’s on the horizon? Our ideas continue to evolve along with our knowledge, but our plans include providing ongoing training for staff, volunteers and grantees. Our volunteer committees plan to establish benchmarks to guide their work in the area of diversity, equity, and inclusion.

GUEST COLUMN

Safeguarding Your Estate Plan

By Robert G. Blue

The goal of minimizing estate taxes has become less pressing for many Marylanders: For decedents dying after January 1, 2019, it is projected that no estate taxes will be due if the decedent has a taxable estate of less than $5.5 million, or less than $11.8 million for a married couple. With this in mind, many people are re-examining their plans with a focus on other issues.

For instance, if you are a charitable inclined, what dollar amount or percentage of your estate would you like to leave for charitable purposes? If you are a married couple, should any of the amount passing to charity be paid at the death of the spouse who is first to die or only at the second death? Might it be a good idea for the spouse who is first to die to establish a charitable trust in lieu of her Will under which the surviving spouse would receive an annual payment for that spouse’s lifetime (either a fixed amount or an amount pegged to a percentage of the fair market value of the trust assets determined annually), with the remaining trust assets passing to charity at that spouse’s later death?

It is helpful to think through options in testamentary planning—such as a charitable trust—since unintended results could occur. For instance, suppose Ron and Jane, a married couple, wish to leave $100,000 to charity at the death of the spouse who is last to die. Ron dies first and, according to his “sweetheart” Will, leaves all of his assets outright to Jane with the expectation that Jane will leave $100,000 to their favorite charity or her Will under which the surviving spouse would receive an annual payment for that spouse’s lifetime (either a fixed amount or an amount pegged to a percentage of the fair market value of the trust assets determined annually), with the remaining trust assets passing to charity at that spouse’s later death?

The CGA option

Another option that Ron and Jane might consider is a charitable gift annuity, or CGA. Agreeing that they want their favorite charity—which could be BCF or another charity of their choosing—to benefit from their estate plans, they establish a CGA that will provide lifetime income as long as either of them lives and ultimately become a charitable gift to BCF. This removes those assets from their estate for estate tax purposes and guarantees the charitable gift after they’ve both passed away.

The CGA option

Another option that Ron and Jane might consider is a charitable gift annuity, or CGA. Agreeing that they want their favorite charity—which could be BCF or another charity of their choosing—to benefit from their estate plans, they establish a CGA that will provide lifetime income as long as either of them lives and ultimately become a charitable gift to BCF. This removes those assets from their estate for estate tax purposes and guarantees the charitable gift after they’ve both passed away.
Conversation with Tom Wilcox

continued from page 1

Baltimore City and its population faced. It seemed that education and jobs were where we could make a difference. We decided that if we focused on early childhood education the funds would make the greatest impact on success. If we could support youth in improving reading and math skills, statistics have shown that those youngsters by the third grade, if they have those skill sets, will go on to graduate at a much higher rate and have less problems. So that’s why with Mari Beth’s leadership we have focused on early childhood education.

TW: You joined us at Commodore John Rodgers School last year for an opportunity to learn about Judy Centers. Given your commitment to children, what was your impression?

YW: It looked as if it was more of a holistic approach to early childhood education. It just wasn’t pre-K, it wasn’t just the community, it really was a holistic approach to both the child as well as the adults. Mari Beth and I had seen a similar situation several years ago when we were down in New Orleans.

TW: Similar type of thing where they had a social work-type environment inside the school reaching out to the community?

MARI BETH MOULTON: Yes, it was an “Educare Center.” It was a whole school . . . They had children from that community from infants all the way up. They also had a clinic there with doctors and nurses.

TW: You have said kind things about our advocacy being a valuable asset to this community. Explain how that aspect of BCF’s work complements your philanthropic priorities.

YW: I think BCF is willing to stick its neck out. It’s listening to what the needs are of the community but also looking and saying not only what’s important and necessary today but where are we are going to be, 5, 10 years from now.

TW: That’s good to hear! What else do you see as BCF’s particular strengths?

YW: I think it takes a great deal of courage and leadership to create the type of campaign that you’ve started and what it’s focused on, [including] early childhood education. But it’s the leadership in the City of Baltimore and in the Baltimore metropolitan area for the State that makes a real difference so I salute you and congratulate you for where you are so far in your campaign and the success in building, not just for today, but for tomorrow. I think the concept of BCF is an outstanding vehicle for charitable giving.

TW: Well thank you for that and thank you for supporting the Civic Leadership Fund that makes it possible.

MBM: Even the emails you send out, it synthesizes the issue and what we can do to support the issue. It’s critical that we get that.

TW: Mari Beth, You have worked together with Danista Hunte and others on Baltimore City’s Early Childhood Advisory Council (ECAC.) How has your participation on that Advisory Council informed your thinking for the Wright Family Foundation?

MB: I think it has opened up my eyes to how systems work. We’ve had the chance to see how people work, or not, and together and how to break down some silos. Also to provide data on things that we need to know before making a decision.

TW: What are some values you would hope people, 100 years from now, would be thinking about in terms of your dreams for your philanthropy?

MB: It definitely needs to be driven by what the needs are within a community as opposed to what a non-profit’s ideas are about something it wants to create. If you do the work to find out what the needs are then you can build around that.

YW: Yes, I would say an openness to meeting the needs of the community to address the barriers in people’s lives. My father took early retirement to work for charities because he had always worked for money. Unfortunately he died just after he retired and was not able to do it. Lucy and I carry that dream forward for him, for the other members of our families and ourselves and I think it is changing lives. If we look at Baltimore City are we going to have people sitting on their stoop looking for a job but not having the tools to do it? Are we going to have corporations that won’t create jobs in Baltimore because they don’t have people to fill them or have the qualifications? As I look at the foundation going forward, who knows what the needs are? going to be 100 years from now but it has to meet the needs of the community and create effective change.

---
The Fund for Rebuilding Baltimore

In response to recent painful events in our city, the Baltimore Community Foundation established The Fund for Rebuilding Baltimore to repair the physical and emotional damage that has been done and strengthen our community for the future.

The Baltimore Community Foundation has a long history of working with neighborhood leaders and community organizations to strengthen neighborhoods. We have always relied on the commitment and the ideas of neighborhood residents to guide this work. The Fund for Rebuilding Baltimore will follow these same principles.

100% of gifts received will go to rebuilding efforts.

ASSESSING NEEDS

Since opening the Fund on April 28, we have been talking to community organizations, nonprofit partners, foundation peers, and public agencies to assess both the immediate needs in the community and the best way to deploy grants from the Fund for long-term benefit. Grant guidelines will be finalized in early May and posted on our website. As of this writing, our draft priorities for the Fund include:

1. IMMEDIATE NEEDS
   Immediate needs of individuals, communities, and businesses negatively affected by recent Baltimore unrest, e.g.:
   - Repairing businesses damaged as a result of the unrest;
   - Repairing/cleaning up neighborhoods damaged as a result of the unrest;
   - Providing immediate human services to people in need as a result of the unrest.

2. LONG TERM NEEDS
   Long term needs of communities disproportionately negatively affected by structural racism and systemic inequities, e.g.:
   - Supporting traditional nonprofit organizations that focus on creating economic opportunities for young people (broadly defined), particularly people of color;
   - Supporting traditional and grassroots nonprofits that provide disproportionately affected residents with legal education and advocacy (e.g. “know your rights” training, civil legal services);
   - Supporting grassroots and community-led efforts to provide education, training, peer-to-peer support, and advocacy among people of color and low-income communities to address systemic issues of structural racism, education policy, and economic disparity.

SUPPORT FOR REBUILDING BALTIMORE

In the first four days, people gave and pledged more than $200,000, including $50,000 each from CVC Health, CareFirst BlueCross BlueShield, and JPMorgan Chase, and $5,000 from CyberPoint International. In addition, a number of individuals and small businesses are raising funds to donate to The Fund for Rebuilding Baltimore. We offer our most heartfelt thanks to the hundreds of people from across Baltimore, the U.S., and the world who are showing their support for our city with gifts to this fund.

We are providing frequent updates on The Fund for Rebuilding Baltimore on our website, through our e-news, Facebook, Twitter and in response to your calls and emails.

Active Board Member Eurich Retires

Juliet A. Eurich, who joined the BCF Board in 2000, is retiring this spring as a trustee. She has served in numerous roles, including as chair of the Committee on Trustees, the 2002 Strategic Planning Task Force and the Education, Child and Youth Development Committee; as a member of the Community Development, Budget and Finance, and Race, Equity and Inclusion committees; and as secretary to the board. In addition, as a BCF donor, she represents the Thalheimer Family Fund which supports BCF’s work in public education. Juliet has been named an Honorary Trustee of BCF.

“Juliet is a seminal figure in the history of this organization and is an unsung hero of Baltimore philanthropy,” says BCF President Tom Wilson. “She chaired our first strategic plan, which set our present course. Her leadership for our Committee on Trustees helped us realize our goals for the board, which increasingly reflects the community we serve. A lot of the significant progress we’ve enjoyed has emanated from her quiet but formidable leadership.”

Board Chair Ray Bank also reflected on Eurich’s tenure with appreciation. “Juliet is the consummate trustee, philanthropist, and community leader,” he observed. “She is in constant demand to serve on a variety of boards because she is the best combination of a great intellect, vast experience, and a big heart. She has wide-reaching expertise in education, the arts, and human services. She sees the big picture, but sweats the small stuff. She is tenacious and tireless in getting things done. Her contribution to BCF in a variety of important roles is immeasurable. It is with lasting respect and affection that we thank her for her remarkable tenure at BCF.”

The Fund for Rebuilding Baltimore

In response to recent painful events in our city, the Baltimore Community Foundation established The Fund for Rebuilding Baltimore to repair the physical and emotional damage that has been done and strengthen our community for the future.