

Giving Changes Everything

FALL 2022



How the Make It Happen
initiative helped shape the
Rhode Island state budget
page 12



RHODE ISLAND
FOUNDATION

The Rhode Island
Foundation
is a proactive
community and
philanthropic
leader dedicated to
meeting the needs of
the people of
Rhode Island.

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T-shirts that celebrate coffee milk. A Rhode Island Red Rooster onesie. The Foundation signature tote bags. This eclectic mix of retail items have one thing in common: they were created by a talented group of high school entrepreneurs.

These young creatives found opportunity through Riverzedge Arts of Woonsocket, an organization that uses art and education to drive social change, increase conservation efforts in Rhode Island, and help high school age youth with, as they explain, "a path to economic and cultural sustainability."

This year marks the 20th anniversary of Riverzedge.

Twenty years later, RI youth continue to find a creative outlet at Riverzedge

The organization was formed in 2002 by artists, youth development professionals, and community leaders who were concerned about the patterns of violence among disaffected youth in the wake of the Columbine shootings.

In addition to paying the youth for their work and helping them develop skills in art, design, and critical thinking, the organization bolsters the whole teen's growth with social, emotional, and educational support and resources. Riverzedge even has a pantry of canned goods and other food if the teen's family is facing food insecurity.

We've supported the organization's efforts since the very beginning and we can't wait to see the creativity their kids will show us in the next 20 years.

September, 2022

I am thrilled to be part of this successful team and very glad to have returned to the region. I was born and raised in Dartmouth, MA, but have spent the past twenty years in south Florida, including seven years in development roles and ten as the Executive Director of a small community foundation.



Philanthropy has been woven through every phase of my life. I was raised in a family with a deep commitment to helping and serving others through acts, gifts, and leadership. Within days of arriving at a new school, workplace, community or board table, my connection to philanthropy has always provided me with a “home” where I have contributed, thrived, and learned how to best serve those around me. I have therefore enjoyed getting to know many of you over the past few months and look forward to expanding the Rhode Island Foundation’s impact. Together with our supporters, we are able to make the state a better place through the deployment of philanthropic investments.

In this issue of our magazine, we meet students at the Genesis Center who are in training to become Certified Nursing Assistants in a Foundation-supported program. We also hear from fundholders, Nancy and Charlie Dunn, who established a Donor Advised fund at the Foundation in 2011 because they want to support the critical “ripple effects” of education in our state. In addition, Yahaira “Jay” Placencia tells us about her long-time involvement with the Foundation as a professional advisor and community partner.

We congratulate Riverzedge on its 20th anniversary—20 years of using art and education to support young artists on their path to professional development: the Foundation is honored to have been with them since the outset. Finally, we highlight recipients of the Robert G. and Joyce Andrew College Scholarship Fund who recently gathered at the Foundation’s annual scholarship BBQ—the Andrew’s 2021 bequest is the largest ever given expressly for scholarships in the Foundation’s history.

We are so pleased to share these hopeful stories with you—enjoy.

A handwritten signature in black ink, appearing to read "Bridget Baratta".

Bridget Baratta, Vice President of Development

My connection to philanthropy has always provided me with a “home” where I have contributed, thrived, and learned how to best serve those around me.

—Bridget Baratta



Turning the instinct to care into a career

A day in the life at the
Genesis Center in Providence,
as seen through the eyes
of students and staff

By Claudia Cornejo, strategic initiative officer

In the back of the room, he sat as the women explained why they chose nursing as their career.

Both Certified Nursing Assistant (CNA) students Katia Louis-Belony and Tina Smith from the Genesis Center in Providence, and their proctor, Carol Lundquist, gave family as a chief reason.

Katia moved from Haiti to Providence to provide a better life for her now toddler son. She received a bachelor's degree in law there but decided to pursue her other love—the medical field—here in the United States.

"I need to be involved in the country," she said. "In Haiti and in the United States, I am conquering all my dreams to help people in multiple ways."

A relative introduced her to Genesis so she could learn English. Once there, she discovered the nonprofit organization has so much more—such as the health care job training programs, GED classes, citizen preparation, child care, and other services. The financial support from the Rhode Island Foundation, its leaders say, is critical to the Center's survival and success.

A recent \$115,000 grant from the Foundation, for example, allows Genesis to expand its workforce programs, like the one that is further shaping Katia and Tina's lives.

Tina moved back to Rhode Island when her mother became sick. She was bored with the repetitious job that she held for more than two decades, and after being a caretaker for her mom, she was inspired to pursue nursing.

"I didn't think I could learn [another career]," said Tina, who just turned 50. "It's a lot to take in sometimes, but the teacher is excellent."

Carol, a longtime certified nurse, has held multiple roles in this field, from administrative to medical to the current teaching

responsibility at Genesis. She came back to Rhode Island during the pandemic to be closer to family.

"There's such a dire need for nurses," Carol stated when asked why she continues to teach. "This is called giving back."

This is her second class at Genesis, where she teaches 16 other students in addition to Katia and Tina. They start with laws, ethics, and resident/patient rights. Communicating as a team and then with patients is next. Then it's proper handwashing, how to take vitals and more than 20 other hands-on lessons before doing their clinicals at Cedar Crest Nursing & Rehabilitation Centre (also known as The Cedars) in Cranston.

This is where the nameless rigid listener, the only man in the class at the time, comes into our story. He didn't say a word, and really couldn't, but looked uncomfortable in his wheelchair—not from the conversation, but from the slumped position in the seat.

Carol used him—a dummy who is missing a hand possibly from his years of being a skills subject for the Genesis students—as an opportunity to demonstrate transporting a patient correctly. They weren't at that point in their lessons yet, so Carol took the lead.

Tina rolled him closer to the bed against the wall—which has helpful information on it that tells the differences between a common cold and the flu—and locked the wheels. Carol lowered the bed to a safe working height. Its guardrails were already down.

Wrapping her arms around him, Carol lifted him up onto the bed. She and Smith then turned him and scooted him into place with their arms supporting his upper-middle back and knees. They then covered him with a couple of blankets and adjusted his pillow.



Although his facial expression didn't change, everyone agreed he looked much more relaxed.

Shannon Carroll, Genesis Center president & CEO, said later that day that the Genesis Center "would not be where we are right now" without the less restrictive grants given to the Center by the Foundation.

"They help us so much," she said. "The RI Foundation, to me, is awesome. They really understand that nonprofits like ours need flexible funding so we can be adaptable to the community's needs. Beyond the dollars, they give so much nonprofit support, whether it be leadership support or even board referrals... the Foundation is just an endless source of knowledge and expertise."

THERE WILL ALWAYS BE NEED

The Rhode Island community has continued to demonstrate strength and resilience when met with unprecedented circumstances. And while we cannot predict what the changing times will bring next, we know that there will always be need. The Fund for Rhode Island was created to adapt to whatever the future holds for our state in the decades to come. By making a contribution of any amount, you'll join thousands of donors who have entrusted the Foundation to forever meet the needs of the day in Rhode Island.

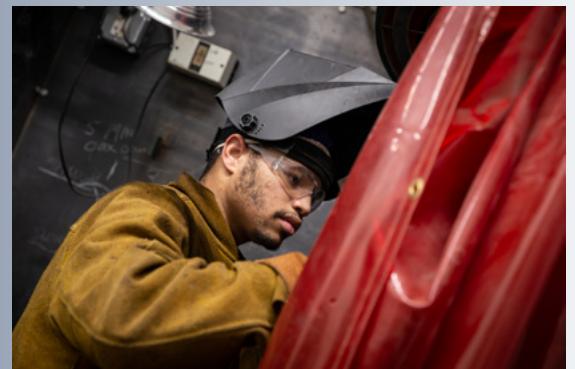
Consider supporting the Fund for Rhode Island by making a donation today.



A year later, recommendations become reality

A look back on how the “Make It Happen: Investing for Rhode Island’s Future” initiative helped shape the RI state budget

By Neil D. Steinberg, president & CEO



During spring 2021, the Rhode Island Foundation launched the **Make it Happen: Investing for Rhode Island’s Future** initiative to develop a set of spending recommendations for the \$1.1 billion Rhode Island has received in federal American Rescue Plan Act (ARPA) funding.

The Foundation worked in partnership with the Economic Progress Institute, the Rhode Island Public Expenditure Council, and a diverse group of steering committee members. The recommendations process was also informed by robust public and stakeholder engagement. During the early fall of 2021, we released our recommendations, and informed General Assembly leadership and the Governor of the Foundation’s efforts and suggested funding allocations.

Since then, state leaders have made appropriations decisions regarding the ARPA dollars that span state fiscal years 2022 through 2027. In fact, the current year’s state budget (state fiscal year 2023) outlines spending for close to \$1 billion within three fiscal years.

Working with our colleagues at the Economic Progress Institute and the Rhode Island Public Expenditure Council, we’ve compared the state appropriations against the original Make It Happen recommendations. And, we’re pleased to report that significant investments are being made in alignment with our funding suggestions.

The following document highlights the ARPA appropriations that align with the Make it Happen recommendations as well as other aligned funds in the FY2023 state budget.



Make it Happen recommendations and reality

Housing
Make it Happen \$405 million
ARPA funds \$287.4 million
other aligned funds \$1.5 million

Behavioral health
Make it Happen \$255 million
ARPA funds \$135.7 million
other aligned funds \$143 million

Workforce development
Make it Happen \$205 million
ARPA funds \$35 million
other aligned funds \$540 thousand

Small business assistance
Make it Happen \$100 million
ARPA funds \$38 million
other aligned funds \$2.1 million

Neighborhood trusts
Make it Happen \$50 million
ARPA funds \$0
other aligned funds \$0

Immediate relief
Make it Happen \$50 million
ARPA funds \$20 million
other aligned funds \$0

Make It Happen ARPA Reconciliation Report with contributions from:

Michael DiBiase
Rhode Island Public Expenditure Council

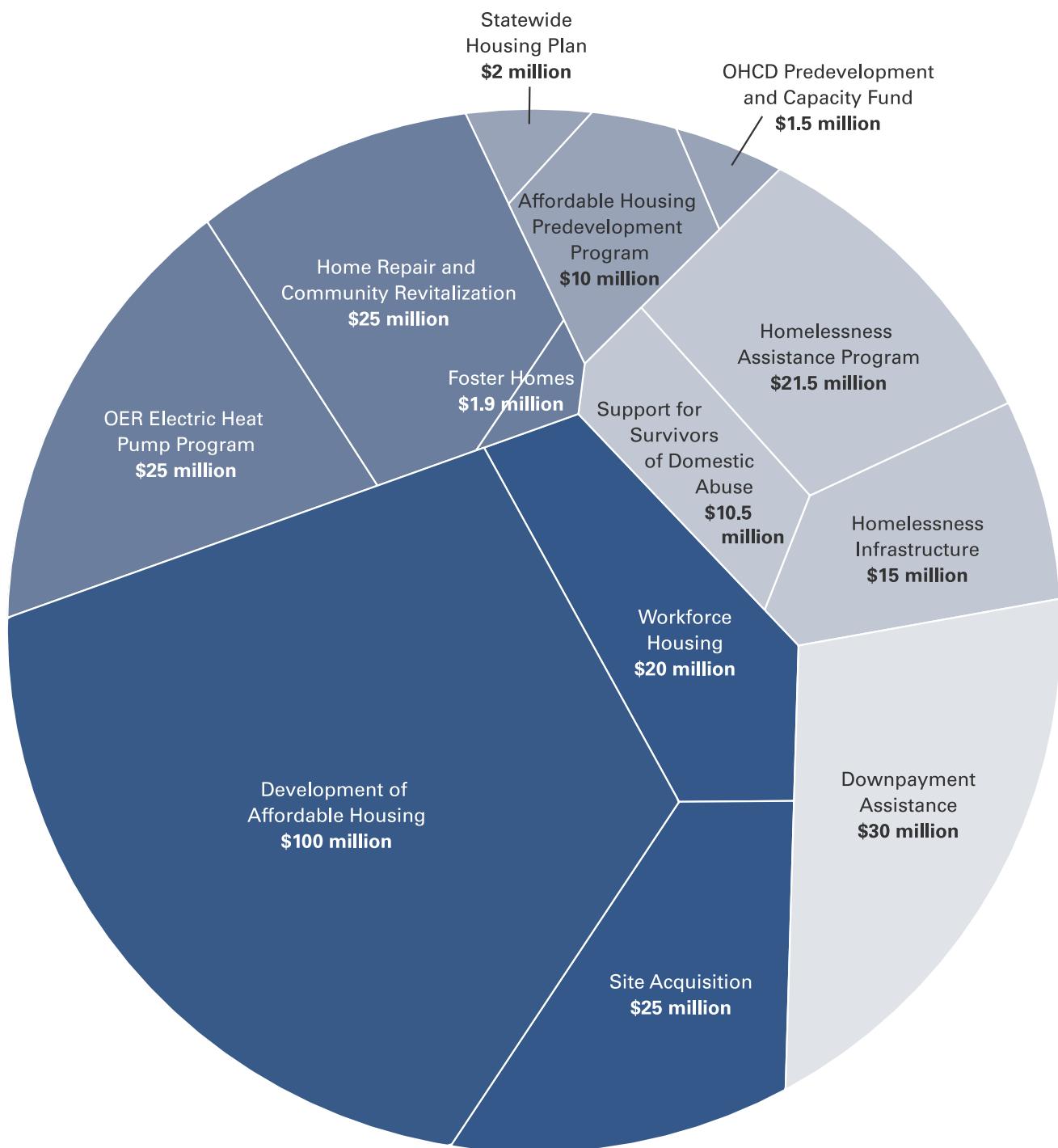
Linda Katz
Economic Progress Institute

Benjamin Shumate
Rhode Island Public Expenditure Council

Bazl Taliaferrow-Mosleh
Rhode Island Foundation

Housing \$287.4 million

Allocations of ARPA Funds for housing in the RI State Budget: fiscal year ending June 30, 2022 through fiscal year 2027

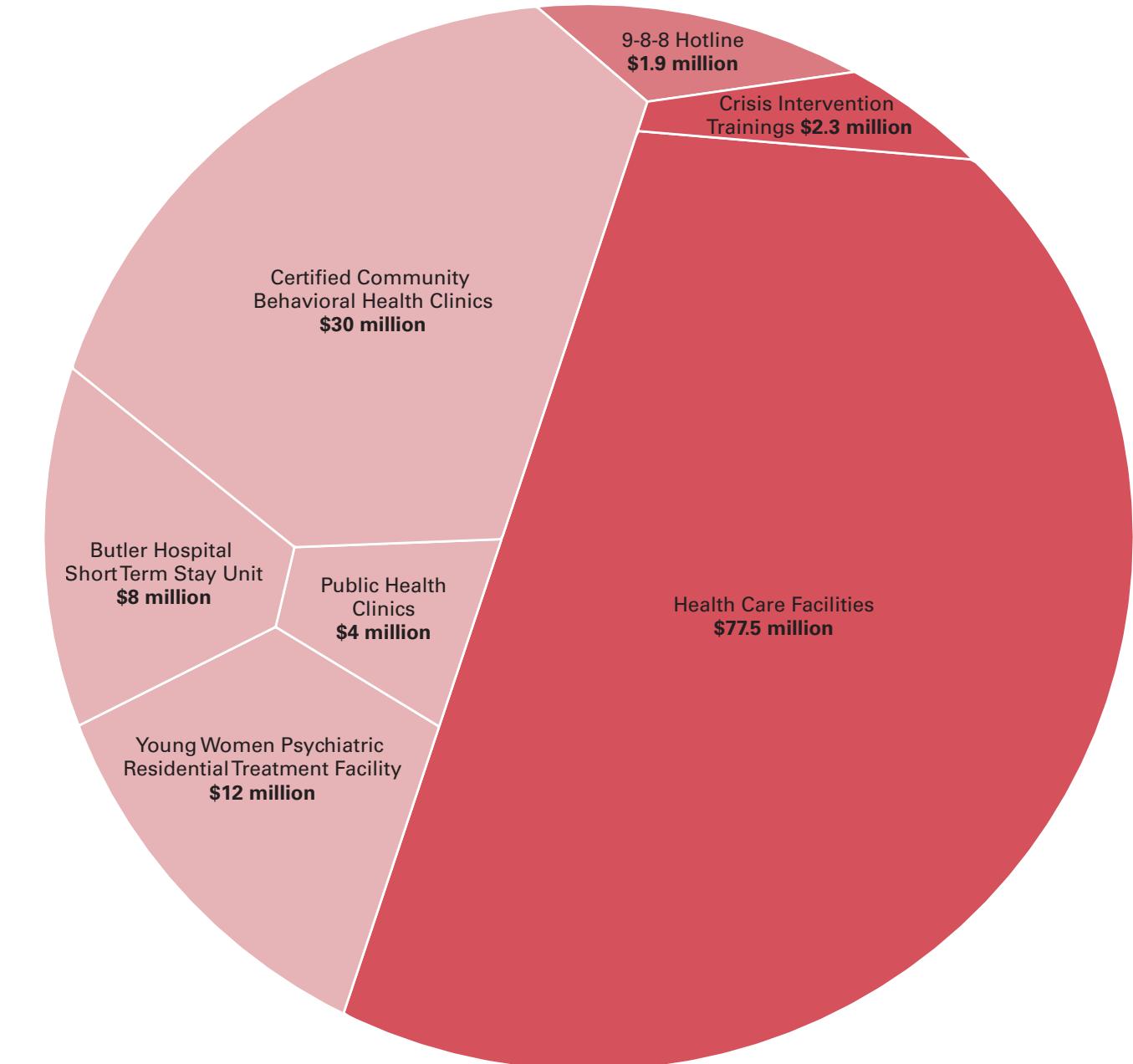


Make it Happen Recommended Areas of Support

- Affordable Rental housing production and preservation
- Healthy homes repairs, remediation & renovation assistance
- Development of a strategic plan and improvements to capacity
- Permanent supportive housing and temporary housing for targeted populations
- First time home buyer program

Behavioral Health \$135.7 million

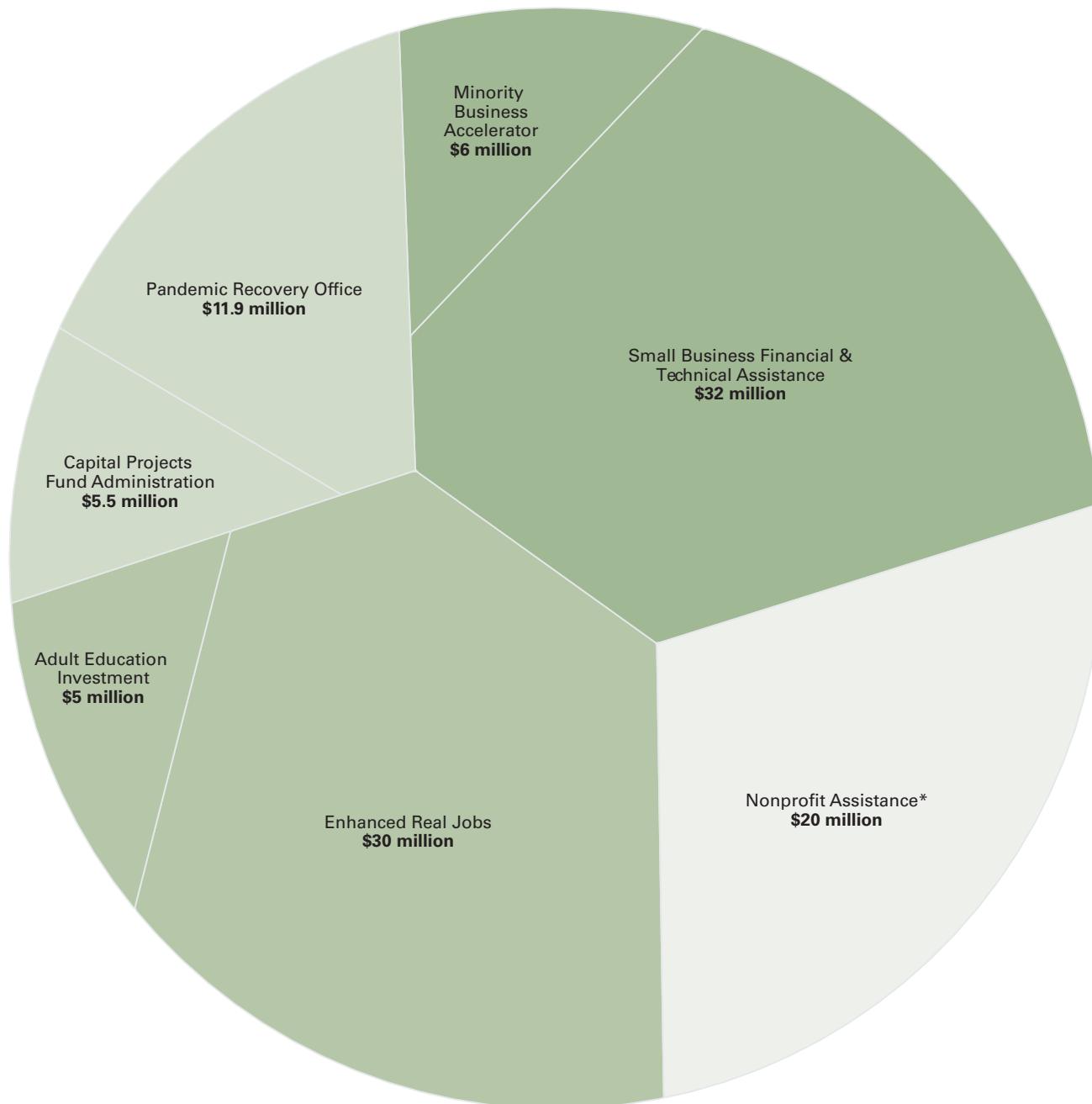
Allocations of ARPA Funds for behavioral health in the RI State Budget: fiscal year ending June 30, 2022 through fiscal year 2027



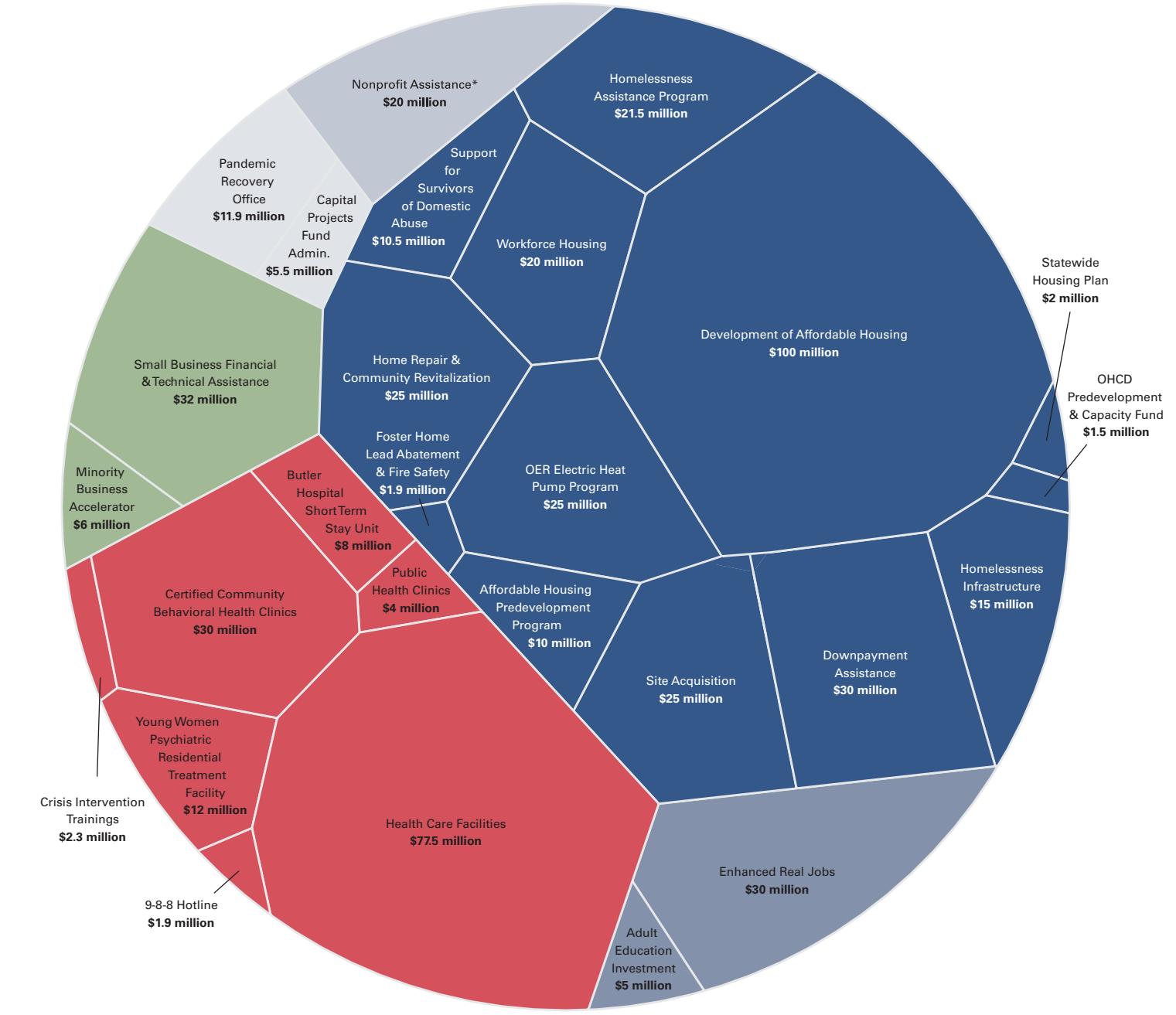
Make it Happen Recommended Areas of Support

- Increase Provider Capacity
- Invest in technology infrastructure
- Build new facilities and renovate/upgrade existing facilities

Workforce Development, Small Business Assistance, Immediate Relief & Implementation \$110.4 million



How it all comes together



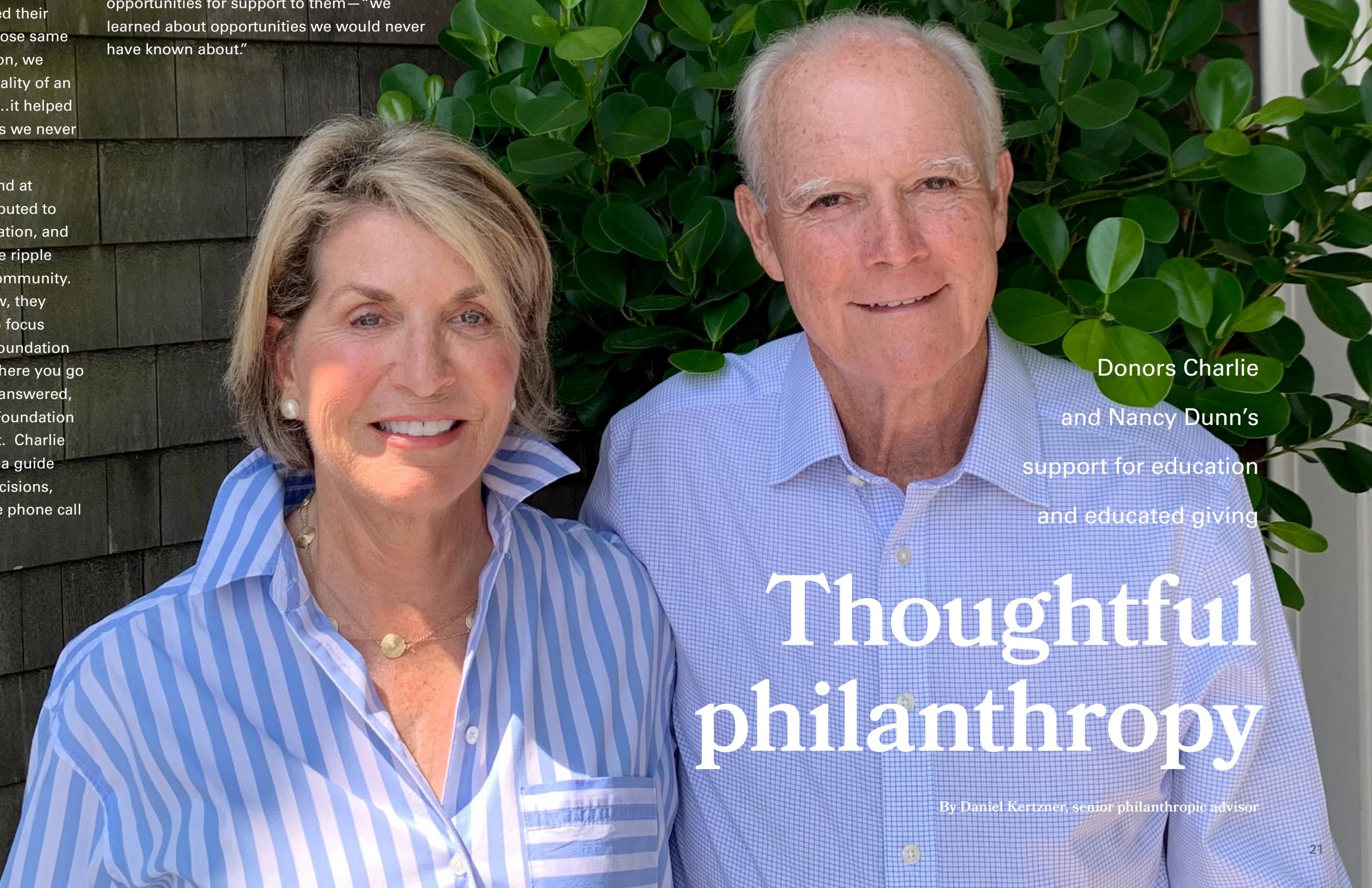
Self-described as “small fish in a small pond,” Charlie Dunn and his wife, Nancy, opened a donor-advised fund with the Foundation in 2011 after selling a family business. Charlie states, “We felt compelled to open the Charles & Nancy Dunn Family Fund to support quality education initiatives and related needs in the community.”

Both life-long Rhode Islanders, Charlie and Nancy married and moved to Providence to raise their children. Charlie, an alumnus of Brown University, and Nancy, a graduate of Wheaton College, greatly valued their education and wanted to instill those same values in their daughters. “Early on, we considered education, and the quality of an education, to be really important...it helped us and our children achieve things we never imagined,” says Nancy.

Even before they opened their fund at the Foundation, the Dunns contributed to organizations involved with education, and they began to witness the positive ripple effects of their support into the community. As their interest in the sector grew, they also started to think about how to focus their giving. “The Rhode Island Foundation offered the best thinking about where you go to make gifts and grants,” Nancy answered, when asked why they chose the Foundation for their philanthropic investment. Charlie echoes, “...the Foundation offered a guide path—guidance to make good decisions, building trust—you can make one phone call and questions are answered.”

Charlie and Nancy continue to reflect upon and focus their giving in thoughtful new ways. Alongside education, they support women’s health and nature conservation. As the ability to prosper has become harder and harder in the current economic environment, the Dunns want to learn more about the ever-increasing issues of homelessness, food insecurity, and other basic human needs. Through the Foundation, Charlie and Nancy also have co-funded other initiatives and appreciate it when the Foundation brings opportunities for support to them—“we learned about opportunities we would never have known about.”

The Dunns approach their philanthropy with sincere humility and gratitude, believing they are not ‘special,’ but merely giving to help others. With regard to their experience working with the Foundation, Charlie and Nancy advise, “If you have the wherewithal to do this, would like to give back and don’t know where to start, we would recommend you start with the Rhode Island Foundation. If nothing else, you will learn from a most knowledgeable Rhode Island institution.”



Donors Charlie
and Nancy Dunn’s
support for education
and educated giving

Thoughtful philanthropy

By Daniel Kertzner, senior philanthropic advisor



A leader dedicated to empowering her community

By Bridget Baratta, vice president of development

Yahaira "Jay"

Placencia finds purpose in the Foundation's equity initiatives that help leaders of color

As a longtime professional advisor and community partner to the Rhode Island Foundation, Yahaira "Jay" Placencia can't pick just one favorite program at or led by the Foundation.

The Bank of America senior vice president has been creating change with the Foundation since Neil D. Steinberg became its President and CEO in 2008. She credits him with creating effective programming that utilizes the expertise of local community leaders.

Jay serves on the Equity Leadership Initiative (ELI) Steering Committee, Impact Investing Committee, and previously the Professional Advisory Council. She is also a member of the Latino Giving Circle.

"My favorite experience so far was sitting and hearing everyone's stories on ELI," she said.

She added it was humbling and inspiring to be a part of a program that helps leaders of color—of whom Jay said we thankfully have many given the size of our state—become more prominent so that true equity can be achieved in Rhode Island. The first ELI cohort of 30 members graduated in August 2022.

Another favorite for her is the Latino Philanthropic Giving Circle. Jay, who is Dominican, said the Foundation steered many Latinx leaders together to create a fund to help local Latino-led and Latino-focused organizations.

"The cool part about this program is that the dollars came from Latinos to help other Latinos," she said. "There's a lot of power in that."

As she looks ahead to the future, Jay sees herself continuing to serve. Contributing to the Foundation's positive impact and influence on important Rhode Island issues has led her to that decision. In her eyes, the Foundation brings people together for great ideas and strategies that are needed to make necessary improvements for all.

"There is always going to be a need for our community foundation," Jay said when asked what the state would be like without the Rhode Island Foundation. "This state has so many needs. The fact that the Rhode Island Foundation is independent and can move on certain issues nimbly makes it very powerful."

She continued, "Under Neil's leadership, the Rhode Island Foundation became a superpower in our state. I am very proud and honored to have had a tiny little part in any of it."

Yahaira "Jay" Placencia is a Senior Vice President with U.S. Trust, Bank of America Private Wealth Management. Jay leads a team of specialists who provide investment and private banking services to high net worth clients, advising them on investments, trust and estate planning, and philanthropy. She has long been a friend of the Foundation, and currently serves on the ELI Steering Committee, is a member of the Latino Giving Circle, serves on the Rhode Island Foundation Impact Investing Committee, and has served on the Professional Advisory Council.

A new scholarship fund at the Rhode Island Foundation is sending nearly 90 Rhode Island students off to college with more than \$470,000 in financial aid targeting local colleges and universities. Students from more than two dozen cities and towns, including Cranston, East Providence, Pawtucket, and Warwick, received help from the Robert G. and Joyce Andrew College Scholarship Fund.

This inaugural round of funding is from the new Robert G. and Joyce Andrew College Scholarship Fund, which provides financial-need-based scholarships to students who pursue undergraduate study at Bryant University, Providence College, Rhode Island College, Roger Williams University, the University of Rhode Island, or the Community College of Rhode Island within three years of graduating from a Rhode Island high school, so many current college students are also eligible. The scholarships are renewable for up to three additional academic years.

The Andrews made the decision to donate a portion of their estate to the Foundation almost 25 years ago. Bob passed away in 2015 at age 81; Joyce passed in 2018 at 84. By the time the details were finalized, their gift had grown to be worth \$12 million, the largest gift expressly for scholarships in the Foundation's 106-year history.





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Lead. We have earned the trust of our donors, community leaders, and Rhode Islanders through a century of effective investments, strategic grants, and responsible decisions.

Transform. We align our fundraising, grantmaking, and leadership to inspire and engage Rhode Islanders to address today's challenges and create lasting improvements in our community.

Inspire. We challenge and encourage Rhode Islanders to become active and involved in the community, to form meaningful partnerships, and to work together for the good of Rhode Island.

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