



Hamilton Community Foundation 2013

*Annual  
Report*



Opening doors and looking beyond...

## MISSION

Building a better community through creative philanthropy, vision and leadership.

## VISION

Continue to be the trusted resource for growing philanthropy and leading change to improve our community.

## STRATEGIC GOALS

The Hamilton Community Foundation's mission, vision and strategic plan goals continue to serve as the "road map" to impacting the community. Our strategic goals are:

- Close the Education Achievement Gap
- Enhance Community Quality of Life
- Ensure Effective Economic Development Leadership
- Expand Asset Development
- Maintain an Effective Investment Strategy

From the development of our strategic plan in 2010 and its expansion in 2013, our commitment to our community remains strong.



**Cover Photo:** The Hamilton Community Foundation was created in 1951 and is located in the historic Lane Hooven House on 319 N. Third Street, Hamilton. The house was built in 1863 and features octagonal design and Gothic Revival style.

**Photography:** Pat Brown, Brown Studios

**Design:** Lisa Sabourin, Sabourin Graphic Design

## Message to the Community



The Hamilton Community Foundation exists to make a positive difference in our community. We continually strive to be an effective resource for donors looking to make an impact with their charitable dollars. We recognize that donors have many options to invest their philanthropic dollars and we are pleased and honored that they trust us to fulfill their charitable goals.

The Foundation board and staff are dedicated to achieving our strategic goals – closing the education achievement gap, ensuring effective economic development leadership and enhancing the community quality of life.

In this Annual Report we highlight some of the important work that we have been involved with over the past year. From our ongoing support for education through providing needed scholarships to deserving students to some of our newer education initiatives including the YES Program and Hamilton StartReady we make education a funding priority. Through investment in the CORE Fund we continue to believe in the importance of revitalizing our downtown and surrounding neighborhoods. We continue to support our community quality of life through our funding for parks, important community events and our involvement in the CLEEN (Comprehensive Litter Education and Enforcement Now) program.

But we don't stop with funding of our own strategic initiatives; we continue to fund the important work of many non-profit organizations in this community that make a daily difference in the lives of area residents. We support social service agencies, arts organizations, recreational opportunities and historic treasures throughout our community. We collaborate with many important organizations to meet the changing needs of our diverse community.

As you look at some of our efforts displayed in this Annual Report we thank you for your support and ask for your continued involvement, suggestions and input. Together, we can continue to make a positive difference and open doors of opportunity throughout our community.

John Guidugli  
President and CEO

Kathleen L. Klink  
Chair, Board of Trustees







Opening the door to education early

## Hamilton StartReady



Seven of those scholarships were used for preschoolers at Immanuel Lutheran School. School secretary and admissions counselor Beth DeVault identifies families who need preschool scholarships. She says that preschool provides “a huge jump start” for children, and that expectations for kindergarteners are higher than ever.

*“Preschool puts children in the right frame of mind for kindergarten,”* says Lukas Bickel, principal at Immanuel Lutheran School.

“These half days are very instrumental in getting them ready for school. The scholarships we get from the Hamilton Community Foundation help families who may otherwise not be able to send their children to preschool. The Hamilton StartReady program at the Foundation shows a real investment in the community,” says Bickel.

Kathleen Klink chairs both the Hamilton Community Foundation board and its education committee. She says that the committee places the education of very young children as a

top priority and is looking to grow the program. She says that goals for Hamilton StartReady include “smart expansion of the program based on data and levels of support from the community, encouraging families to use the scholarships already in place and establishing additional community partnerships.”

Last school year, The Foundation made a grant to Hamilton Living Water Ministry, Inc., for their weekly preschool program, attended by 17 children. This year, that program will now expand as a Head Start preschool.

The newest StartReady preschool is open at Booker T. Washington Community Center. The most recent class of Greater Hamilton Chamber of Commerce’s Leadership Hamilton chose the new preschool as their class project, contributing \$6,820 for classroom equipment and supplies.

The StartReady Fund at the Foundation continues to accept donations, giving the whole community a chance to invest in our children.

Education professionals sometimes call preschool the most important grade. That is because 90 percent of a child’s brain is developed before entering kindergarten.

Thirty percent of Hamilton students tested were unprepared for kindergarten and more than half of area kindergarteners did not attend preschool. Three years ago the Hamilton Community Foundation launched its Hamilton StartReady Program to make preschool accessible for all. Program collaborators include Fitton Family YMCA, Hamilton City Schools, Butler County United Way, Hamilton Living Water Ministry, Inc., Immanuel Lutheran Preschool, Presbyterian Preschool, Colonial Schools and Butler County Educational Service Center’s Head Start program.

The Foundation’s Hamilton StartReady Fund began with a financial investment by the Foundation and community donations. Funds are used for preschool tuition scholarships, with the number of scholarships available and preschool locations both growing. The Hamilton StartReady Committee, which includes members of the Hamilton Community Foundation’s Education Committee, monitors the entire process, continually looking for ways to expand.

**Scholarships for 28 Hamilton preschoolers were provided last year, for children who otherwise would not be able to attend preschool.**



### Hamilton StartReady Mission

- *To develop an awareness of the value of preschool among the population of parents/children not now participating in an early learning experience.*
- *To provide an environment in which preschool is universally available to all children in the Hamilton City School District.*





## Setting small businesses up for success

## Butler County Microenterprise and Microloan program



Caterer, clown, transportation, legal consulting, auto repair. These are just some of the services provided by new local small businesses, thanks to the award winning Butler County Microenterprise and Microloan program at SELF (Supports to Encourage Low Income Families). The Hamilton Community Foundation has granted \$17,500 to this program, which is now in its third successful year. SELF director Jeffrey Diver says he fully expects the program not only to continue, but to grow.

The Butler County Microenterprise and Microloan program helps low- and moderate-income individuals learn all aspects of business:

financial, legal, marketing, insurance and more. Participants receive hands-on assistance with writing their business plan throughout the 10-week session, and the opportunity to apply for a microloan ranging from \$500 to \$3,500.

The program is a partnership between SELF, Neighborhood Housing Services and the Small Business Development Corporation (SBDC) at the Hamilton Mill, formerly called the Biz Tech Center.

Twenty five of the 28 businesses launched through the program are still alive and kicking.

According to Mark Lankford, associate director of the local SBDC (Small Business Development Corporation), this is well above the national average (two thirds of small businesses typically close after one year).

“Based on the continuing interest from clients and strong partnership between three nonprofits, we expect to continue helping many low- and moderate-income residents start their own businesses,” says Diver. He says that in addition, 10 of the micro businesses are participating in community economic development by hiring part-time employees and sub-contractors.

Jerry Brown, asset building coordinator at SELF, adds that employees faced with downsizing and layoffs often choose either to go back to school or start their own business.

*“This program helps the whole community... it is about people helping themselves, job creation and self-sufficiency,” agrees Brown. “This gets people back into the workforce.”*

Randy Riggan of Riggan Automotive on Route 4 in Hamilton enrolled in the Micro program two years ago. Riggan was approved for a micro loan to expand his small business, allowing him to more than double in both physical size and customer base. His one-bay auto shop has grown and now boasts three lifts and three flat stalls. He has regular customers and two contracts, and a part time manager answers phones and schedule services.

*“I have half a dozen people from the class who are now my customers,” he says, adding that the chance to network was an unexpected benefit of the program.*

Melanie Ross successfully completed the Microenterprise & Microloan program in April of 2013, after she was laid off from her 22-year job at a transportation firm. Melanie has a CDL, industry knowledge and loves the transportation field, especially working with the elderly and people with disabilities. At the urging of her two grown sons, she enrolled in the SELF class. With input from advisors at SELF and the SBDC she began to mold her business plan to create her business, Transport U.

She received a microloan through SELF’s partner, Neighborhood Housing Services. Her fleet now includes an eight-person, wheelchair-equipped van and two six-person mini-vans. She hired her biggest “cheerleaders,” sons Jarrod and Justin plus two other drivers.

Her vehicles can now be seen all around town, and she regularly transports 22 developmentally disabled adults and also has contracts to transport older adults.



According to Diver, SELF’s participation in this program is an extension of its mission to help low-income people become their own best advocates as they obtain and sustain self-employment. “We are extremely grateful for the Hamilton Community Foundation’s support of SELF, its mission and its clients,” he said.





Making kids smile for more than 50 years

## *The Keely Orthodontic Fund*



Alyssa Singleton

Three years ago, Alyssa Singleton was referred to the Keely Orthodontic Program by Dr. Lamont B. Jacobs. Alyssa's mother was raising two girls alone and was laid off from her job after 33 years. Funding braces was far from possible for the family.

This year Alyssa finished orthodontic treatment with Dr. Jacobs.

*"I can now go on with great confidence and a smile!"*

One of the most early, active funds of the Foundation, The Keely Orthodontic Fund helps families pay for their children's braces. Established in 1958 by Priscilla Keely with a gift of Ohio Casualty Insurance Company stock, the fund is a memorial to her father, Dr. Charles Keely, and grandfather, Dr. George Keely, both long-time practicing dentists in the area.

*"It is my wish to assist patients from Butler County for whom dental care is urgently recommended and whom this care would not otherwise be available," wrote Keely in 1958.*

If an orthodontist feels a family's financial situation may fit Keely Orthodontic Fund guidelines, the child's information is sent to the Hamilton Community Foundation. Detailed information and documentation is gathered by financial counselors at Lifespan, a social service agency serving Butler County.

The family has partial financial responsibility for their child's orthodontic care -- usually 25 percent of the cost, with the Keely Fund paying the remaining 75 percent. "We look at their financial situation to make sure they can make the regular payments," says Debbie Khulenberg, LifeSpan financial counselor.

"Patient's families always have some 'skin in the game' as they are required to pay for part of their care. It is not free," says Lamont B. Jacobs, DDS, adding that this was a requirement set forth to families from the program's inception.

Over the years, the Foundation has received myriad letters of thanks. "I wanted to write a letter concerning the generous help that we received toward my son's treatment," wrote a grateful mother. "... I hope your agency continues to help those in need. There are many families who would benefit the same way we did."

Those words are echoed throughout the years as new cases are completed. Like many of the Foundation's funds, The Keely Orthodontic Fund is an endowment, and only the fund's investment earnings are spent each year. There is often more demand than the fund can pay for each year, resulting in a waiting list for new

cases. Currently, there are six patients enrolled in the Keely program and receiving active orthodontic treatment. Local orthodontists participating in the program over the years include Doctors John Chesher, Nelson Diers, Edward Hess, Teresa Martin, James Zettler, Charles Manilla, Bill Duvendeck, Lamont T. Jacobs and Lamont B. Jacobs.

"The kids that have been helped are very thankful," says Dr. Lamont B. Jacobs. He adds that braces are important for overall health; including a bite that works correctly and prevention of breakdown of the gum tissue. "In our society, appearances do play a role in how well people are perceived in the workplace and even how in well they are paid," he adds.

Keely continued to provide financial support to the fund until she died in 1983 at the age of 89. She left a generous bequest to the Hamilton Community Foundation so that the Keely Orthodontic Fund could continue in perpetuity.

**No doubt, Keely would have been proud that her idea helped so many to smile.**



Miss Priscilla Keely





## Dancing Without Limits



*“I would venture to say that most dance companies do not work with people with ‘disabilities,’ and you seem to seek out how you can include them. Thank you for teaching my daughter that everyone can dance. I believe as she grows up, it will allow her to be more accepting of people.”*

These are words of gratitude for Michelle Davis of the Miami Valley Ballet Theatre (MVBT), from Audra Buckley, whose daughter is in the Dancing without Limits program there. The Hamilton Community Foundation’s \$3,000 grant to Dancing without Limits helped fund two dance classes this year for children and adults with disabilities.

The 16 year old dance company relocated to the former Hamilton Journal News Building on Court Street in downtown Hamilton two years ago. “We are extremely proud to be a part of the community of greater Hamilton, a community which has a rich history in supporting the arts,” says Davis. “Hamilton is also a community which supports its citizens with disabilities,” she adds. This is the first grant the Foundation has made to the MVBT. The Foundation’s grant covered almost half of the costs of the Dancing Without Limits program for a year.

The dance instructors for these classes are trained to work with those with special needs. The class for children with Autism and Down’s Syndrome includes dance and other kinds of body movement and sometimes incorporates bean bags, balance pods and parachutes.

## Miami Valley Ballet Theatre

Every week is different, every child is different,” says Davis. “The kids are very sensitive to change.” She keeps the music and even the order of songs in the class consistent from week to week.

Davis has a Master’s degree in education and experience teaching creative movement to children with Autism and Down’s syndrome at Hamilton Public Schools and Westover Preparatory School. Dance and creative movement for this population is not only recreational, it is therapeutic and confidence building, she says.

Emma Dingledein attends the Hamilton Freshmen School and volunteers in MVBT’s class for children with disabilities. “The experience is absolutely amazing... I think that I learn more from them than they do from me,” she says.

The class for adults with disabilities also focuses on creating a love of movement. Students are transported to the downtown Hamilton studio from Liberty Center, a program of the Butler County Board of Developmental Disabilities.

Jody Mann was one of six adults participating in the class this year from Liberty Center. “Dancing makes me happy and I’m getting my exercise,” Mann says, adding that her favorite part was partnering with other MVBT students this past spring. Six of the adult Developmentally Disabled class members practiced for months with six children from the regular classes at MVBT. The dance they refined together was presented to at MVBT’s spring re-

cital. All the dancers wore custom made costumes. Brenda Tolson, Habilitation Support Specialist at Liberty Center, says the performance was “the best inclusion of people with development disabilities I have seen in my 41 years doing this work. Instead of just watching the show, they were in the show! There was not a dry eye in the house.”

Connie Mehlman, advocacy coordinator at Liberty Center, says that besides giving these individuals an opportunity to express themselves, other skills reinforced through the dancing program are patience, taking turns and practicing -- resulting in an overall sense of accomplishment.

Davis feels many more people in our community could benefit from these classes in the future.

*“In our efforts to educate the community in the art of ballet, we want to embrace all of our community, including those with disabilities and the gifts they bring to the arts,” she adds.*

Instructor Michelle Davis (left) onstage with student dancer Jody Mann at a Dancing Without Limits recital.







**“Be an opener of doors”** ~Ralph Waldo Emerson

*It is an exciting time as we collaborate with innovative community efforts aligning with the Foundation’s education, economic development and quality of life strategic goals. Pictured are just some of the new projects that recapture some of Hamilton’s historic spirit, while providing expanded offerings for work and play!*

## Opening the door to Revitalization



Miami University Downtown, in the revitalized Robinson Schwenn building, brings educational opportunities for all in the heart of Hamilton.



Sara's House shop at the corner of Third and High, offers gifts and furniture in the bottom floor of a revitalized building which formerly housed a restaurant.

The Bark Park at Veteran's Park is new venue for four-legged citizens.



The former Journal-News Building finds new life as home for the Butler Tech School of the Arts, Hamilton City Schools ABLE (Adult Basic and Literacy Education) program and Miami Valley Ballet Theatre.



Green CORE (Consortium for Ongoing Reinvestment Efforts) signs can be seen around town in soon to be renovated and repurposed buildings. The Foundation is a proud partner of CORE, which provides a framework and resources for revitalization in and around Hamilton’s urban core.



Spraygrounds at former Wilson Pool site and Benninghofen Park provide cool summer fun.





## Opening the door to college for more kids

## Youth Exploring Success



YES program participants and Hamilton High School seniors Chardonnae Laster (left) and Elizabeth King (middle) with YES Advocate Lindsey Lassiter.

Research from multiple sources indicates that students whose parents did not attend college may be less academically prepared, have less knowledge of how to apply for college and financial aid and may have more difficulty acclimating to college once enrolled.

Hamilton Community Foundation's Youth Exploring Success (YES) program was started in 2010 to meet the needs of first generation college students. The program is unique because although YES Advocate Lindsey Lassiter, MA, works for the Hamilton Community Foundation, her offices are at Hamilton City Schools. The Foundation pays Lassiter's salary and all the program's expenses.

**The college access program reached a major milestone in 2014 when its ideal outcome was achieved: 100 percent of the 25 YES participants from Hamilton High School's graduating Class of 2014 are college-bound this fall.**

The aim is to start students in the program when they are freshmen and continue through senior year. Lassiter, the only employee working directly with the program, spends two days a week at the Hamilton Freshmen School and three days a week at Hamilton High School.

Audrey Amburgy was a YES student who graduated in 2014. She is now at Xavier University majoring in radiologic technology.

"I found out through the YES program that you can actually become something....you can actually do this! I would like to come back someday in the future and talk to the YES students at the high school and provide the same inspiration to them," she said.

**This year there were 82 students in the YES program at Hamilton High School. Lassiter says that each school year, there is an increase in the number of YES students, their level of participation and even their parent's participation.**

Students admitted to YES must express a sincere desire to go to college. "The program is designed to recruit them in the 9th grade and follow them through the 12th grade," she says, adding that student needs change as they progress through high school.

Lassiter helps freshmen and sophomores explore personal interests that could lead to a paid career. "I ask them, 'What do you like? What are your favorite classes?' Then we do career research and explore various professions." She assists juniors and seniors with ACT and SAT test registration, college applications and financial aid forms. Each spring she helps college-bound seniors "sort through the barrage of info related to finances, housing, meal plans and books."

YES students at all levels have the opportunity to go on group college visits. They currently visit about eight colleges a year, including the College of Mt. St. Joseph, Wright State University, Xavier, University of Cincinnati and Miami University.

The days grow longer and warmer but Lassiter and the YES program do not take the summer off! "This is a year round program," says Lassiter. "We have an active book club which meets weekly, and this year we visited Berea College in Kentucky."

Follow up with YES alumni students continues and 100 percent of those who responded are all still in college. Lassiter says former YES students' progress will continue to be tracked through the coming years to assess the program's long term results.

The 2014-15 school year begins a new group of students join YES. Along with the other YES participants, they will receive guidance and support that can change a life – opening the door to higher education and the all choices it provides.



Megan Needham, a junior at Hamilton High School, at the YES spring celebration.

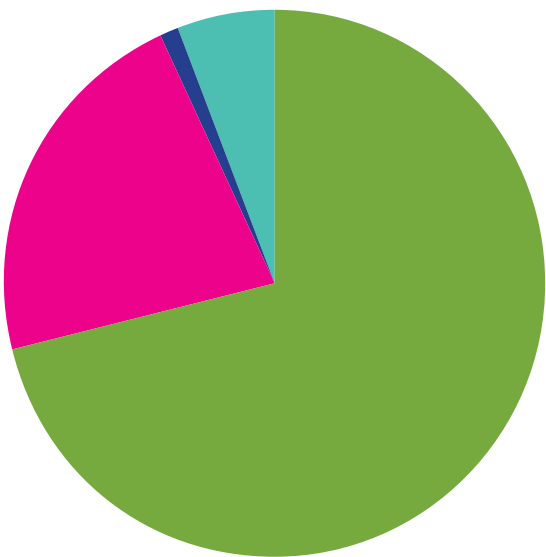




## By The Numbers

## Investment Performance

Assets	2013	2012
Current Assets		
Cash and cash equivalents	\$260,387	\$403,205
Current portion of notes receivable	2,704,955	2,752,000
Property held for sale		250,000
Prepaid expenses	329	328
Total Current Assets	2,965,671	3,405,533
Investments	69,931,783	59,220,236
Notes receivable, net of current portion	7,387,805	7,397,865
Property and equipment, net	5,296,319	5,402,874
Accrued interest, net	495,622	505,300
Cash surrender value of life insurance	231,500	256,704
Total Assets	86,308,700	76,188,512
Liabilities and Net Assets		
Current Liabilities		
Current portion of grants payable	1,856,971	1,072,508
Accrued payroll and related	5,590	4,801
Accounts payable	3,600	4,993
Total current liabilities	1,866,161	1,082,302
Grants payable, net of current portion	328,000	1,268,500
Total liabilities	2,194,161	2,350,802
Net Assets		
Unrestricted	21,967,766	20,156,685
Temporarily restricted	23,812,285	19,782,328
Permanently restricted	38,334,488	33,898,697
Total Net Assets	84,114,539	73,837,710
Total Liabilities and Net Assets	\$86,308,700	\$76,188,512



HCF Current Asset Allocation

as of 12/31/2013

	Current%	Target%
Global Equities	71.3%	74%
Global Fixed Income & Cash	22%	20%
Real Assets	1.0%	1.0%
Diversifying Strategies	5.7%	5.0%
	100.0%	100.0%

### Asset Allocation by Manager

Manager	Current %	Target %
Vanguard 500 Index Signal	12.6%	12.2%
PIMCO Fundamental IndexPlus Total Return	12.1%	12.3%
U.S. Equity LVT	3.8%	3.5%
Nuveen Dividend Value	5.1%	4.7%
Fidelity Low Priced Stock Fund	3.8%	3.8%
PIMCO Small Cap Stocks Plus	5.1%	5.0%
Columbia Acorn CI Z Fund	0.0%	0.0%
Vanguard Mid Cap Growth Index	5.1%	5.0%
First Eagle Overseas	5.9%	6.8%
Harbor International Fund	5.9%	6.7%
Templeton Foreign Smaller Companies	3.7%	4.0%
DFA Emerging Markets Value	4.5%	5.0%
US Bank - Fixed Income	2.0%	2.5%
DoubleLine Total Return Bond Fund	0.2%	0.0%
Loomis Sayles Bond Fund	2.7%	2.5%
PIMCO Total Return	3.0%	5.0%
Templeton Global Bond	2.3%	0.0%
First Financial Fixed Income LVT	3.1%	5.0%
Fidelity Real Estate High Income	4.7%	5.0%
Common Sense Investors, LP	2.5%	0.0%
Coast Diversified	0.3%	0.0%
Weatherlow Fund I LP Fund	5.3%	10.0%
JP Morgan Alerian MLP Index ETN	1.0%	1.0%
FEG Private Opportunities Fund	0.9%	0.0%
First Financial Checking	1.1%	0.0%
First Financial Money Market	3.2%	0.0%
Pending Common Sense Redemption Cash	0.0%	0.0%
TOTALS:	100.0%	100.0%

\*Our 2013 financial statements, audited by Stephenson & Warner, CPA, are available for review by calling the Foundation office.





*“The doors will be opened to those who are  
bold enough to knock.” -Tony Gaskins*

## *Opening the door to community philanthropy*

### Ways to give

*Each of the following fund types offers flexibility  
so you can choose the one that's right for you.*

#### Unrestricted

**Meeting ever-changing community needs.** When you establish an Unrestricted Fund, your gift can address a broad range of local needs— including future needs. The flexibility of your unrestricted gift enables your community foundation to respond to the community's most pressing needs, today and tomorrow.

#### Donor Advised

**Your personal approach to giving.** Establishing a Donor Advised Fund allows you to make a gift to us, and continue to stay involved by suggesting charitable uses for your gift. Grant awards are issued to charities in the name of the fund (or anonymously if you prefer).

#### Field of Interest Fund

**Connecting your values to high-impact opportunities.** By establishing a Field of Interest Fund, you can target your gift to address a specific area of the community, such as children or the arts. Your gift will help meet community needs in your interest area—even as those needs change over time.

#### Scholarship

**Investing in deserving students.** Your scholarship gift can help students at all levels achieve their lifetime dreams. We provide expertise to help you meet your personal goals and award scholarships to deserving students.

#### Designated Funds

**Helping local organizations sustain and grow.** Establishing a Designated Fund allows you to support the good work of a specific nonprofit organization's mission.

#### Agency

**Created by a nonprofit for their own benefit.** Non-profit organizations can establish an Agency Endowment at the community foundation as a simple and efficient way to help create sustainability for their organization.



Kim Williams, with her son Tyler, who received the Davene Harris Memorial Scholarship. The 2014 graduate of Stephen T. Badin High School will study psychology at Miami University.



Destiny, Dakota and Lillie pause during “Spelling Rocket,” an interactive iPad teaching tool used at Bridgeport Elementary. The iPads were part of a Harry T. Wilks Hamilton Celebrates Education grant in 2013.

The Foundation was a partner and provided support for a year of centennial events in honor of Hamilton native and Caldecott award winning children's author Robert McCloskey. One of the events included a parade with floats depicting McCloskey book themes.







“There are so many doors to open.

*I am impatient to begin.” -Charlie Gordan*

## *Opening the door to community philanthropy*

### How to give

The Hamilton Community Foundation provides you a simple, highly personal approach to giving. You can make a gift of cash, stocks, bonds, real estate, or other assets. Most charitable gifts qualify for maximum tax advantage under federal law.

Each donor has a unique giving experience, tailored to suit your situation and charitable goals. Here are the steps to creating a fund at the Hamilton Community Foundation.

- We set up a special fund in your name, in the name of your family or business, or to honor or memorialize a loved one.
- You receive tax benefits in the year your gift is made.
- Based on the type of fund you establish, you may be able to stay involved in the good works your gift makes possible. You can recommend an area or organization you'd like your gift to support, or rely on our staff to determine the areas of greatest need in our community.
- Our board issues grants in the name of the fund you have established.
- We handle the administrative details.
- Your gift can be placed into an endowment that is invested over time. Earnings from your fund are used to make grants addressing community needs. Your gift—and all future earnings from your gift—is a permanent source of community capital, helping do good work forever.



The Foundation made a grant to the 1913 Flood Commemoration Committee. Flood level signs were installed around town as permanent markers in remembrance of a pivotal event in our city's history.



The Foundation's Youth in Philanthropy Committee made a grant to the Hamilton Boys and Girls Club. Pictured are YPC members making a check presentation to Boys and Girls Club director Karen Miller. Each year, YPC grants more than \$35,000 to area agencies supporting youth.



### Community Grantmaking

***In 2013, Hamilton Community Foundation's Board of Trustees, in alignment with strategic plan goals, made a commitment to invest \$300,000 in the following areas:***

- \$100,000 to ensuring economic development leadership
- \$100,000 to closing the education achievement gap
- \$100,000 to community of life projects

***The Foundation also made grants from our unrestricted funds benefitting arts & culture, social services, education & youth and community development including:***

1913 Flood Commemoration \$5,000  
 Boys & Girls Club \$50,000  
 Butler County Agricultural Society \$50,000  
 Butler County Challenger Baseball \$17,900  
 Butler County Historical Society \$10,000  
 Center for Family Solutions \$29,250  
 Chriskindlmarkt \$15,000  
 Companions on a Journey \$5,000  
 Emergency Money Fund \$5,000  
 Fitton Center for the Creative Arts capital campaign \$300,000 (payable over three years)  
 Great Miami Valley YMCA – Booker T. Washington Center \$100,000  
 Greenwood Cemetery \$304,000 (payable over two years)  
 Hamilton StartReady \$60,000  
 Johnny S. Black memorial marker \$1,100  
 Journal News Hunger Relief/Shared Harvest Food Bank \$10,000  
 Miami Valley Ballet Theatre \$3,000  
 Millville Avenue Meal Center \$4,000  
 Parachute Butler County Court Appointed Special Advocates (CASA) \$5,000  
 Pyramid Hill Sculpture Park & Museum \$35,000  
 Serve City \$5,000  
 Supports to Encourage Low Income Families (SELF) \$17,500  
 TvHamilton \$30,000



# Opening the door to community philanthropy

## Ways you can leave a legacy

**Bequest by Will: A legacy of giving.** Including a charitable bequest in your will is a simple way to make a lasting gift to your community. When you make this gift through your community foundation, we establish a special fund that benefits the community forever and becomes your personal legacy of giving.

**Charitable Gift Annuity: Income for today, a gift for tomorrow.** Giving through a Charitable Gift Annuity allows you to arrange a generous gift to your community, while providing yourself a new income source you can count on for the rest of your life.

**Charitable Remainder Trust: For you and your community.** Giving through a Charitable Remainder Trust allows you to receive income for the rest of your life, knowing that whatever remains will benefit your community.

**Charitable Lead Trust: Giving back to community and your loved ones.** A Charitable Lead Trust helps you build a charitable fund with your community foundation during the trust's term. When the trust terminates, the remaining assets are transferred to you or your heirs, often with significant transfer-tax savings.

## We are here to help you!

For more information on charitable giving, and ways to integrate it with your financial planning, contact us at (513) 863-1717 or visit our website: [hamiltonfoundation.org](http://hamiltonfoundation.org).



Martha (left) and Dana Mehl (center) with Joel Schmidt (right) at the 2014 Legacy Society dinner.



Legacy Society members Gerry Hamond (left), Lee Parrish (center) and Pat Froelke (right) enjoy each other's company at the Legacy Society Dinner.



(from left to right): David L. Belew, Jim Fitton, Steve Timmer, Sarah P. Carruthers, Michael P. Dingeldein, Heather Lewis, Kathleen L. Klink, Herman R. Sanders, Scott Hartford, Craig Wilks, Thomas Rentschler, Jr. ( Not pictured: Butch Hubble, Lee H. Parrish )

## Hamilton Community Foundation Board of Trustees

Kathleen L. Klink, Chair  
Retired Superintendent, Lakota Local Schools

Herman R. Sanders, Vice Chair  
Retired Owner, Butler County Lumber Co.

Craig Wilks, Secretary  
President, Wilks Insurance

Heather Lewis, Treasurer  
Attorney, Millikin & Fitton Law Firm

Sara P. Carruthers, Community Volunteer

Michael P. Dingeldein  
Director of Architecture & Planning  
Community Design Alliance

Jim Fitton, Community Volunteer

Scott Hartford  
Owner, Hartford Steel Sales

Butch Hubble  
Executive Director, Booker T. Washington Center

Thomas Rentschler, Jr.  
Vice President of Marketing, FORTE

Steve Timmer  
Retired, City of Hamilton Fire Captain

David L. Belew – Trustee Emeritus  
Retired President, Becket Paper Company

Lee H. Parrish - Legal Counsel  
Attorney, Parrish, Marcum, Hirka & Trokhan Co., LPA



## Hamilton Community Foundation Staff

John Guidugli, President/CEO  
(front left)

Katie E. Braswell, Vice President  
(middle left)

Betsy Hope,  
Vice President of Communications  
(front right)

Lindsey Lassiter, MA,  
Youth Exploring Success Advocate  
(middle right)

Deborah Mast,  
Administrative Program Manager  
(back left)

Cindy Parrish, Executive Director  
(not pictured)

Daniel J. Sander, CPA,  
Vice President of Finance  
(back right)





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Address correction requested

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## *100 Years of Community Foundations*

*Community foundations in the United States are celebrating their centennial! The first community foundation in the county was established in 1914 in Cleveland, Ohio, as a way to make giving and granting accessible to the entire community. Your Hamilton Community Foundation was founded in 1951. We are a public charity with \$86 million in assets and more than 600 funds. We manage individual, family and corporate funds, as well as nonprofit agency endowments. We proudly award more than \$4 million in grants annually in greater Hamilton. This is a picture of our "home," the historic Lane Hoover House, as depicted by Mrs. Jackson's third grade class from Brookwood Elementary in Hamilton.*



Reconfirmed in compliance in the fall of 2012 by the Council on Foundations. The National Standards for U.S. Community Foundations are philanthropy's most rigorous benchmarks and serve as a blueprint for internal and external operational excellence.

