



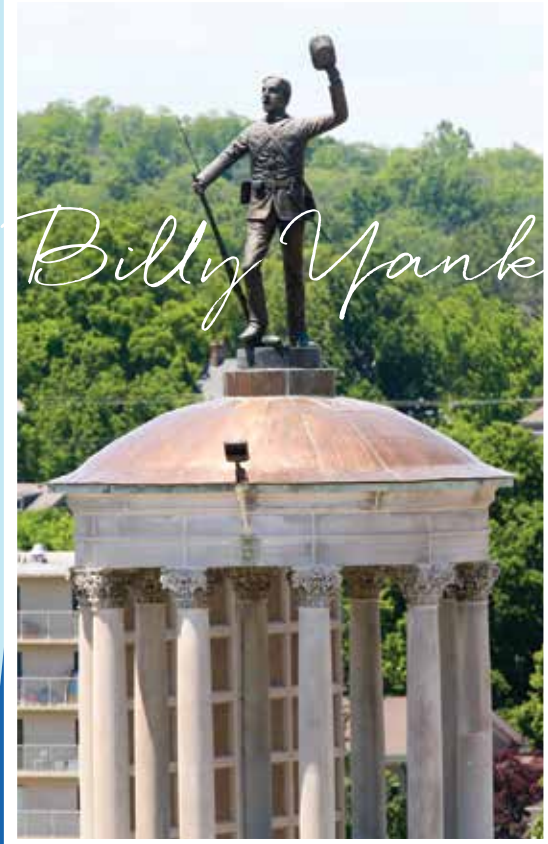
Hamilton Community Foundation

REPORT to the COMMUNITY 2016

Vibrancy



Vibrancy



Billy Yank, a bronze Union soldier waves from the newly refurbished copper dome high above the east bank levee of the Great Miami River. The Soldiers, Sailors and Pioneers Monument marks the spot where General Arthur St. Clair established Fort Hamilton in 1791.

Recently, a Hamilton Community Foundation matching grant of \$250,000 from the Foundation's Michael J. Colligan Fund was used toward the cost of refurbishing the monument - that some refer to as the symbol of Hamilton.

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

- Increase assets to increase impact.
- Create a better educated community.
- Increase economic vitality.
- Enhance community quality of life.

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There is a change in the air. You can feel it throughout the community; from the beautiful new Marcum Park to the recently opened stores and new offices in downtown; from the reemergence of activity on Main Street to concerts, events and community gatherings; from new and exciting arts programming to a renewed sense of purpose among community members...great things are happening. There is a new attitude in our community - a new sense of vibrancy.

Of course we all know that great things don't just happen. Positive change requires vision, planning, engagement, collaboration and hard work. The Hamilton Community Foundation is proud to be a driver of this community's renewed vibrancy. We are pleased that we have helped in the important work of bringing people together to accomplish great things. We have been successful in this journey because of the involvement of many. The generosity of our donors, the vision of our Board, and the efforts of our staff and volunteers allow us to reach out into the community and be a change agent.



In this report we share a few examples of the vibrant community that your Community Foundation helped create. There are many other stories of charitable dollars making a positive difference in our community. Together we are experiencing success in building a better community through creative philanthropy, vision and leadership.

We know that we could not do this work without your support. We thank you for your involvement and your dedication. It is through our collaborative efforts that we help enhance this vibrant community.

John Guidugli
President and CEO

Heather Sanderson Lewis
Chair, Board of Trustees

On the cover: A modern depiction of Hamilton namesake Alexander Hamilton is now a permanent mural at 15 S. D Street in Hamilton. Designed by Miami University Hamilton art instructor Nicole Trimble, the design was inspired by an 1806 portrait of Alexander Hamilton by John Trumbull.

The mural was painted in 2016 as part of Hamilton's StreetSpark program, a partnership between the City of Hamilton and the Fitton Center for the Creative Arts. The shapes and colors in the mural are echoed throughout this Report to the Community.

ANIMALS BENEFIT *from* FOUNDATION GRANT



Gia & friend

On a cold day in early April, a stray dog with a badly swollen leg arrived at the Animal Friends Humane Society. “After no one came to claim her, we took an x-ray and found an extreme fracture,” says Animal Friends director Meg Stephenson. Unfortunately, the leg had to be amputated. Gia, the one and a half year old Whippet/Doberman mix, has recovered well and was recently been adopted by a loving new family.

This happy ending is a result of a grant made by the Hamilton Community Foundation for the purchase of an X-ray machine. The grant was made possible by an anonymous donor.

Animal Friends requested the grant because their old machine was no longer working and beyond repair. Injured and sick animals needing X-rays had to be transported to other facilities, causing a treatment delay and sometimes additional pain for the animal.

When the grant was awarded, Meg and her staff researched comparable models of radiography systems, made the purchase and arranged for installation. Finally, the new equipment was inspected by the State of Ohio, and a green light was given to put it to service.



*A healed & happy
Gia in her
new home*

Since that day in March, the system has been used often. The ability to X-ray on site allows Animal Friends medical staff to more quickly diagnose, treat, and save animals.

Rascal is another example. The 12-year-old Pomeranian/Chihuahua mix was not being well cared for and his owner was court-ordered to surrender the dog to Animal Friends. When Rascal was brought in, he was clearly ill, and an X-ray was performed. Rascal had Collapsing Trachea Syndrome and two bladder stones. After surgery and recovery, Rascal has now been successfully adopted into a loving home.

Samantha, a black domestic short hair kitten, came to the agency as a stray with an injured leg. X-rays revealed a severe fracture, necessitating amputation. After she recovered, Samantha served as the “guest of honor” at Animal Friend’s recent Bark ‘n Purr fundraising event. According to Meg, a guest at the event was so smitten with her that she adopted Samantha.

“The X-ray machine continues to be a huge asset,” says Meg. “Thank you for helping us acquire this wonderful diagnostic tool.”

A BIG YEAR *for* SCHOLARSHIPS

This was the biggest scholarship year in the history of the Foundation! A total of 162 area students received Hamilton Community Foundation scholarships ... the largest number of awards in one year. The awards total more than one million dollars, which is quite impressive. But perhaps more impressive are the individual stories associated with the awards.

Heidi Martin received the Pat Bueheit Memorial Scholarship and the Jessie and Bessie Richter Memorial Scholarship. She also received the Rose Ann Post Memorial Scholarship, which was given for the first time. Rose Ann's daughter, Jennifer, met Heidi this spring at the Foundation's scholarship reception. "She's gracious, poised, humble and kind," said Jennifer. "And she's obviously hard working. My mom is smiling in heaven."

Rose Ann was a vibrant 7th and 8th grade English teacher at Roosevelt and Garfield Junior High School. This scholarship was recently established by Rose Ann's four children to honor her 28 years of teaching in Hamilton City Schools.



Heidi Martin is the first recipient of the Rose Ann Post Memorial Scholarship. Here, Heidi (left) visits with Jennifer Post (right), daughter of the late Rose Ann Post.

Though originally from Illinois, Rose Ann came to Ohio to attend Miami University and ended up in living here for the rest of her life. She was actively involved in many organizations here.

Rose Ann passed away last year at age 85. The scholarship in her memory is a renewable need-based scholarship to graduating seniors from Hamilton High School pursuing an education degree.

"She was one of those most thoughtful and caring people I've ever met," says friend Dave Belew. "She loved her students and her community."

Twin brothers Alvin and Kelvin Mantey also received scholarships this year from the Hamilton Community Foundation. At age 14, they came to Hamilton from West Africa's Republic of Ghana with their mother and older set of twin brothers to reunite with their father, who had been working here for 11 years until the family could join him.

Alvin is the recipient of the Jeannie S. and Don J. Meeks Scholarship and the Nathaniel Lampley, Jr. Scholarship. Kelvin received the Herbert T. and Olive S. Randall Scholarship.



Bill Hartford, Dorothy Mantey, Kelvin and Alvin Mantey, Stephen Marfo and Linda Hartford hold the American flag they flew in the nation's capital this spring in honor of the students.

Linda Hartford started the Meeks scholarship in her parents' memory. "Alvin is an outstanding young man who will be a great influence and will touch many people," says Linda.

In high school, both Alvin and Kelvin were in the National Honor Society, Rhapsody in Blue show choir, Fellowship of Christian Athletes and Men's Soccer Team.

Kelvin will major in engineering this fall at the University of Cincinnati. "From my younger days in Ghana, I would be found to be making my own toys and playing with them, and sometimes even modifying broken ones. My mother told me she could see I would be an engineer when I grew up," he said. "I truly believe that the power of a creative mind, combined with the necessary tools, can change the world."

Alvin is also headed to the University of Cincinnati this fall, where he will study biology.

"I was so impressed with both of them," says Nate Lampley, Jr., who founded the Nathaniel Lampley, Jr. scholarship that Alvin is receiving. "They are energetic, inspiring, and grateful and they are positioned for success."

As the brothers anticipate college, Alvin reflected, "I thank the City of Hamilton and the Hamilton Community Foundation for giving me the opportunity to receive help in furthering my education."



Caroline Herzog (left) recently graduated from Hamilton High School and received the Ruth Alice and Walter Thomas Limerick Memorial Scholarship, the Lindenwald-Hamilton Kiwanis Club/Richard Snyder Memorial Scholarship and the Janet and Gene Eggleston Scholarship. Caroline will attend the University of Cincinnati. Elizabeth Herzog (right), Caroline's older sister, was a previous Hamilton Community Foundation scholarship recipient, and both were active in the Youth Philanthropy Committee while in high school.



Back row, from left to right: **Richard Hileman** (CASA trustee), **Daniel Sutton** and **Elias Tzoc** (Hamilton High School) and **Erin Robinson** (CASA trustee). Front row, from left to right: **Marylynn Koons** (Ross High School), **Grace Taylor** (Hamilton High School), and **Chris Shultz**, executive director of CASA.



As part of the grant making decision process, YPC members makes site visits to potential grantees to learn more about the impact of their work. Here, **Karen Miller**, director of Boys and Girls Club of Hamilton, talks about her agency's funding proposal.



Wyatt Grimm (Ross High School) and **Isabel Dingledein** (Hamilton High School) volunteer at Hamilton Community Foundation's Scholarship Awards Night.

YOUTH *powered* PHILANTHROPY

Every year 20 area high school students from freshmen to seniors have a rare opportunity: year-long experiential instruction on nonprofit organizations, philanthropy and volunteerism. Each spring, they put that learning into action by granting more than \$45,000 to local projects impacting youth.

The Youth Philanthropy Committee (YPC) is a grant making arm of the Hamilton Community Foundation, and the members take their responsibilities seriously. With the guidance of adult instructors, the students spend many hours learning how to evaluate grant proposals for maximum impact. They are taught to look at factors such as measurable goals and objectives, community support, sustainability, and most importantly, the effectiveness of addressing important needs for area youth.



YPC members volunteered this spring at the dedication of Hamilton's new Marcum Park. From left to right are: **Garrett Eldridge**, **Kenny Pendergest**, and **Libby Crank** (all of Badin High School), Co-Advisor **Katie Braswell**, **Caroline Herzog** and **Emma Dingledein** (both of Hamilton High School), and **Marylynn Koons** and **Wyatt Grimm** (both of Ross High School).

This year, YPC awarded \$45,320 to 12 different programs:

Abilities First - \$5,000 for the Summer Therapy Program

Butler County Educational Services Center - \$4,890 for Kindergarten Readiness Camp

Big Brothers Big Sisters - \$900 for the COUL Active Lifestyle Program

Boys and Girls Club - \$1,500 for Get Fit With Zumba

Caring Closet - \$5,000 for Caring Closet Grows

Hamilton Living Water Ministry - \$1,865 for Summer Camp

Miami University - \$4,931 for Youth Citizen's Academy

Millville Avenue Meal Center - \$5,000 for Ready, Set, Go

Muscular Dystrophy Association - \$5,000 for 2017 MDA Summer Camp

Parachute CASA - \$4,000 for Be a Child's Voice

SELF - \$2,500 for Neighbors Who Care Home Repair

YWCA Girls Inc. - \$1,644 for Mind + Body

Four YPC members graduated this year and are off to college. They are **Libby Crank** (Stephen T. Badin High School), **Caroline Herzog** (Hamilton High School), **Austin Howard** (New Miami High School) and **Jenna Wright** (Ross High School). "YPC gave me a sense of what I could do in my community," says Caroline. "It has also taught me to look at the big picture and how the decisions we make can affect many people."

A Welcome **PAUSE** for Parents



A teen volunteer plays a game with a participant of the Pause program.

“Research has shown that we are better dads, moms and grandparents when we take time to refill our buckets,” says Lisa McCoon, program director of Pause, an initiative of the Butler County Children and Family First Council.

Pause, a respite program for special needs families, does just that by providing breaks for caregivers while their children are being expertly cared for. The Hamilton Community Foundation recently made a \$40,000 grant to Pause.

The grant monies are being used to pay personnel and to buy supplies and food for the respite events. It will also allow the program to expand to two more locations. Currently there are three respite sites in the area. The new grant will allow the program to expand to five sites.

There are three respite events monthly, and each is three hours long. “I have heard so many times from parents that this is how they get through,” says Lisa, adding that respite care for caregivers has been proven to reduce abuse, increase family functioning and decrease divorce rates.

“My son Tyler and I enjoy all the events that you have for these children,” says one parent. “Pause is the best thing to come along for these children. It helps us meet other parents and children that are like our family and is all around just a great program to be connected to.”

Pause was started in October 2014, and is the only program of its kind in Ohio. The program serves 137 families and 230 children, ranging in age from three months to 22 years.

Pause has a four part focus:

- Provide caregivers opportunities for **rest**.
- **Support** families by providing a self-discovery tool to assess needs for their family and then connect them to available resources.
- Provide **community** and **fun** to families to build family bonds with each other and other families participating in Pause.
- **Train** and **equip** volunteers and community partners to understand the needs of families with special needs children so that resources for these families are maximized.

“Unless you are living the life of having a child with a disability, you don’t get it,” says Pause Coordinator Lisa McCoon, who is also a mother to children with special needs.

A total of 381 volunteers help keep the program running smoothly. Besides respite events, Pause also provides free family fun days, so the entire family can participate together with other families. “So many of these families live in isolation for so many reasons,” says Lisa, adding that special needs families normally spend an extra 40 to 80 hours per week caring for their children than other families.



Pajama Night at the Pause program is fun for both young and old.

The program supports families with special needs youngsters by providing respite care and partnering with them to grow their own natural support system.

“The respite events have given my husband and me a rare night once a month, a time when we can reconnect,” says one mom. The Family Fun events are also a blessing for my three year old son who is non-

verbal. I’ve never seen him enjoy his time anywhere like he does at Pause events and I completely believe it’s because they create an environment where not a single child feels like they have special needs. They are free to be who they are and my son thrives in that.”

Hamilton Community Foundation *Vibrancy*



Booker T. Washington preschoolers, as taught by Sharonna Ash Jarrett and assisted by Shelby Bushnell, proudly graduated this past spring.

Spirit

Musicians provided traditional holiday music at the 25th annual German Village Christmas Walk.

Patriotism

Boys Scouts lead the way in Hamilton's iconic July 4th parade.



A young resident of German Village plays in the one of two water features at the new Marcum Park in the center of Hamilton.

In motion

Rotary Park, complete with permanent corn hole and ping pong, is Hamilton's second new downtown park.



Sparkle

A young resident of German Village plays in the one of two water features at the new Marcum Park in the center of Hamilton.

Steeped in History

The Lane Library/Hamilton Community Foundation joint celebration was held at the new Third Street Plaza, as part of the celebration the Lane Public Libraries 150th anniversary.



Preserving Hamilton's History **ONE HOME** at a Time

Hamilton is a city rich with historic homes boasting several architectural styles. However, historic homes inevitably need costly repairs. Since housing values have dropped over the last few years, obtaining a bank loan based on the home's appraisal is not necessarily easy for owners of historic homes.

That is where a Foundation grant to Neighborhood Housing Services, Inc. (NHS) comes in.

The Hamilton Community Foundation made a grant of \$260,000 to the nonprofit NHS to help fund historic rehabilitation projects in the neighborhoods surrounding Hamilton's newly revitalized downtown. NHS Executive Director Lorie DiStola says the grant was used by the nonprofit organization to make much-needed low interest loans to homeowners.

"The goal is to promote home ownership and bring back historic neighborhoods," she says, adding that home ownership is good for the community in many ways. Homeowners tend to stay in their neighborhoods longer than renters, adding stability to neighborhoods. They have a financial interest in ensuring their homes are well maintained inside and out.

Word circulated quickly that the grants were available



Charles and Verla Simmons, in front of their 1905 Victorian home.

and a waiting list developed. A total of 12 projects were approved, for everything from updating plumbing and electric, to adding a garage, brick repair and window installation. Because the residents pay the loans back, the fund will automatically replenish.....allowing other residents to access the funds for projects in their homes as well.

"Because of the revolving nature of this grant, it will continue to have an impact," says John Guidugli, Foundation president/CEO.

"It was a lifesaver," says Verla Simmons, who received one of the loans. She and her husband Charles spent 10 years restoring their 1905 Victorian home in the Dayton Lane area. The home had been made into several apart-

ments and the Simmons' wanted to bring it back to a single family home. Eight years in, they realized that their home's exterior was badly in need of repainting, but by that time, they were out of money. The Hamilton Historic Preservation Program provided them with a low interest loan that covered most of the cost of repainting.

When the owners of a historic home present a need to NHS, they are required to obtain two bids. NHS screens all contractors to ensure they are licensed, insured and carry workers comp insurance. According to Lorie, this screening process provides a safety net for the homeowners.



NHS pays the contractors directly.

"This project goes hand in hand with Hamilton's revitalization," says Lorie. "It works well in conjunction with CORE (Consortium for Ongoing Revitalization Efforts), which helps people get the homes in historic neighborhoods in the first place. The fruits of our labor are definitely there. It's great to be part of the evolution in Hamilton and join everybody who believes collectively in the revitalization of our city," Lorie adds.

NHS' construction specialist inspects the home before any work is done. "If a roof needs to be replaced before a bathroom renovation is done, for example, we discuss this with the homeowner, says Lorie. "We want to ensure the home is a safe place to live first and foremost. Our construction specialist will walk thru the home first to look for any high priority needs which may affect the home's safety," she adds. When the work is done, and the homeowners have signed off that the job is to their satisfaction,

NEW Funds

Over the last year, donors have established these new funds at the Hamilton Community Foundation.

Margaret and Earl Conrad Riverview Elementary Enrichment Fund

Margaret and Earl Conrad Memorial Scholarship Fund

DRS Smith Scholarship Fund

Empower Hamilton Fund

Local 20 Firefighter Memorial Fund

Gersbach Family Charitable Advised Fund

Hamilton Conservation Corps-Riverside Natural Area Fund

Charles T. and Margaret W. Koehler Memorial Scholarship Fund

Dana H. and Martha M. Mehl Scholarship Fund

Pat and Debbie Pawling Scholarship Fund

Rotary Park Fund

Robert Lee and Ruby (Winkler) Singleton Memorial Scholarship Fund

Lois Sohngen Fund

Jared Stormer Memorial Scholarship Fund

We Are Hamilton Fund

Daniel Accorinti Memorial Scholarship Fund

Justin M. Asher Memorial Scholarship Fund

German Village Christmas Walk Fund

John and Delores Harper First United Methodist Church Fund

Leadership Hamilton 26 Bike Rack Project Fund

One City One Book Fund

Rose Ann Post Memorial Scholarship Fund

Study Abroad Scholarship Fund

Willbrand Family Fund

Setting up a named fund at the Hamilton Community Foundation is an easy process, and we ensure that your giving experience is tailored to you and your charitable goals. Depending on the type of fund, you can choose to recommend an area or organization you would like your gift to support, or rely on the Foundation to help determine the area of greatest need in the community. Funds can be established with cash, stocks, bonds, real estate or other assets. Please contact us with any questions, (513) 863-1717.

Legacy Society MEMBERS

The following generous people have planned future gifts to their community through bequests, trusts, life insurance, or retirement assets, by remembering the Hamilton Community Foundation in their estate plans.

Anonymous(4)
Daniel L. Acton, Sr. and Tanya Acton
*Elizabeth V. Allen
*Paul A. Armstead
*Joseph John Auraden
Donna Barich
*Mary Virginia Bast-Connelly
Robert Jacob Bastian
*Edward and *Alice Bauer
*Isabel Beardsley
James W. and Mary Becker
*Dorothy Bronson Beeler
Dick and Joan Beer
David L. and Margery Beckett Belew
*Audre M. Belew
*Paul Benninghofen
Dr. Doris Bergen
Walter B. Blair
*William and Renee Boehm
*Betty J. Bonar
Bob Borden
Katie E. and Gregory B. Braswell
*W. Otis Briggs, Jr. and Virginia Briggs
Marcia Koehler Bunce
*Agnes White Burgess
*Dr. Richard P. and Marilyn Burkhardt

* Dr. James R. and *Anne B. Carr
Ralph R. and *Donna Carruthers
Sara Procter Carruthers
*Donald S. and *Marian Cisle
*Thelma Clark
*L.P. Clawson
Honi and Neil Cohen
*Michael J. Colligan
Tom and Kay Colins
*Margaret and *Earl Conrad
Barbara Dayton Copeland
Bob and Nancy Sohngen Cottrell
*Thelma W. DeLaCroix
Michael and Lucinda Dingeldein
*Mary Helen Dolan
*Sanford Eaffy
*John W. Eaton
*Helena Edmunds
*Betty A. Edwards-Weil
*Bob and Nelda Ernst
Mary Pat Essman
Paul and Patricia Parrish Everhart
*Margaret C. Fiehrer and *Albert C. Fiehrer
Cora and Robert Fiehrer
*Edwin and *Esther Feintheil
Dr. Joel Fink
*Cyrus J. and *Elaine J. Fitton
*Mr. and *Mrs. Donald W. Fitton, Jr.
James and Susan Fitton
*Marion S. Fitton
*Grace and *Vaden Fitton
*George J. and *Sudie M. Flick
Rick J. Flick
Nancy Belew Follmer

*Camilla Frechtling
*Edward and *Josephine Frechtling
Thomas E. Fritsch
Patricia L. Froelke
*Dorothy A. Gard
*Ruth W. Garrett
Austin and Lois Gleason
*Joseph B. Gogolach
*Fannie Gray
*Jeanne and *Emerick S. Gross
Jackie and Bill Groth
*Mr. and *Mrs. I. Richard Groves
John and Judy Guidugli
*Mildred Hackley
Gerry A. Hammond
Scott and Jill Hartford
*Marian F. Hawk
Robert E. and Shirley A. Hill
*John A. and *Corinne H. Hock
*Marie Hoerner
Betsy Hope and Don Garrett
*Butch Hubble
*Joseph C. Hubner
Clarence Huening
*Eugene H. Hughes
*Emma Hughes
*Paul W. and *Ella D. Hugus
*Robert E. and *L. Gail Ireland
*Marie Iutzi
Carl and Anne Jantzen
*Carl and *Freda E. Jennewein
*Leland Johnson
*Lazard Kahn
*Priscilla Keely
Kathleen Klink
*T. Edward and *Hannah Knapp
*Joe and *Lois A. Koefler
*Mr. and *Mrs. Charles T. Koehler
David A. and Karen Underwood Kramer

Dr. Carole J. Kuhn
Michael R. and Kelli Verdin Kurtz
*Louise Lang
*Beverly B. Latta
Dr. Robert J. Lerer and Janis Lerer
*David Leshner
John and Heather Lewis
*Harry and *Martha Lingal
Calvin and Maryann H. Lingler
Dr. and Mrs. Daniel Love
*Georgia Lukes
*Gary Martin
*Donald S. and *Jeannie E. Martin
*Ruth I. Maurer
Anne G. McAdams
*George C. and *Freida B. McCandless
Dana and Martha Mehl
*Dan and Cordelia Millikin
*Lilian Millikin
*Marlene L. Moore
John and Shirley Moser
*William Murstein
*Janice Osborne
*Josephine Osso
*Howard and *Eva M. Ottman
*Herbert G. Pabst
*Huntington V. and *Katherine A. Parrish
Cynthia V. Parrish
Lee and Jackie Parrish
Pat and Debbie Pawling
*Howard and *Gladys Pearson
*Walter and *Rita L. Pond
*Alberta F. Pratt
Mae K. Prentice
*Roy Pryor and *Grayce Willis Pryor
*Robert C. and *Gertrude Rathgens
*Harry T. Ratliff
*Emily B. Reed
*John and Lori Rehm

Mary J. Reimer
Marcia Reist
John and Ellen Reister
*Walter A. and *Edith Beckett Rentschler
*Jessie and *Bessie Richter
*Marie Richter
*Emma Ritchie
*Robert, *Martha and Dorothy L. Rooke
*Mrs. Doris Sanders
Herman R. and Ingrid E. Sanders
*Ralph A. and *Nellie Manring Sauer
*Madge S. Schaeuble
*Jerry Schick
*Donald and *Millicent Schirmer
*Robert Schlenck
George and Rhonda Schmidt
Joel H. and Marilyn O. Schmidt
*George and *Betty Schrage
Gerald and Cheryl Scrivner
*Anna and *Adrian Schultheiss
*Myrna Schwarm
*Virgil Schwarm
Katherine S. Schwarz
*Gladys S. Sepin
*John A. Shafer
Ilse Smith
Joshua A. and Frances Smith
Phyllis R. and *Kennth H. Snyder
*Louis C. Sohngen and *Constance Sohngen
*Robert M. and *Helen Sohngen
Martha Jane Spain
*Willilam E. and *June W. Steed
*Dr. James A. Stewart
*Albert Stuhlmueeller
Betty J. Terry
*Fred and *Susan C. Thum
*Albert J. and *Mary K. Tillmann
*Diane Tillmann
Steve and Linda Timmer

Darren and Cynamon Trokhan
*Mr. George W. Turnbull
*Margaret Turnbull
*Alma I. Unzicker
Mrs. David M. Urmston
Buddy M. and Athalene Wallin
Kathleen K. Walsh
Jeannie and *David Weeks
John A. and Karen P. Whalen
*Lawrence and *Adela Wheeler
J. D. and Jill White
Robert B. Wile
Frank N. and Nancy D. Wiley
Mr. and Mrs. Craig Wilks
*Francis Wilks
*John K. Wilson
James L. Winkle
*Mary J. Wys
*Adeline Zoller

**deceased*

Including a charitable bequest in your will is a simple way to make a lasting gift to your community. You determine the type of fund you would like to establish with your gift. Upon your death, we set up a special fund in your name, in the name of your family, or in honor of any person or organization you choose.

We are here to help and are available to work with you or your attorney. Please contact us with any questions, (513) 863-1717.

INCREASING ASSETS

One of the Hamilton Community Foundation's Strategic Goals is to "Increase Assets to Increase Impact." Our investment committee is a team of experienced investment advisors and community leaders with a depth of experience, charged with making effective decisions on behalf of the Foundation.

The goal is to grow the Foundation's assets for maximum impact in the community.

A report prepared by the Fund Evaluation Group demonstrates that the investment performance of the Hamilton Community Foundation compares very favorably to other community foundations, when viewed over the last quarter of 2016 and over the past seven years.*

HCF Average Performance

| (as of December 31, 2016) | Qtr. | 1 YR | 3 YR | 5 YR | 7 YR |
|--------------------------------------|-------------|-------------|-------------|-------------|-------------|
| Hamilton Community Foundation | 1.2% | 5.9% | 3.4% | 8.3% | 7.0% |
| All Participants | 1.0% | 7.7% | 3.2% | 7.5% | 6.8% |

HCF Asset Allocation

| (as of December 31, 2016) | Hamilton Community Foundation Targets | Hamilton Community Foundation 12/31/16 Actual | All Participants |
|-----------------------------------|---------------------------------------|---|------------------|
| U.S. Large Cap | 29.7 % | 28.7% | 24.8% |
| U.S. Small/Mid Cap | 13.8% | 13.8% | 7.5% |
| Non-U.S. Large/Mid Cap | 13.5% | 12.6% | 17.3% |
| Non-U.S. Small Cap | 4.0% | 3.8% | 0.6% |
| Emerging Markets Equity | 5.0% | 4.8% | 5.2% |
| Domestic Fixed Income | 11.6% | 9.7% | 12.6% |
| High Yield Fixed Income | 5.0% | 6.3% | 1.5% |
| International Fixed Income | 3.4% | 3.1% | 2.5% |
| Hedge Funds | 10.0% | 10.6% | 12.7% |
| Private Equity | 3.0% | 2.9% | 4.6% |
| Real Estate | 0.0% | 0.0% | 1.9% |
| Real Assets | 1.0% | 1.0% | 2.6% |
| Cash/Other | 0.0% | 2.7% | 6.2% |

*Data obtained from Fund Evaluation Group, LLC, 2017.

Investment Committee Members

- John A. Whalen (Chair)**, retired, Morgan Stanley Wealth Management
- William A. Groth**, National Retirement Consultants
- Thomas Koehler**, Hamilton Brass Company
- Bret H. Parrish**, Johnson Investments
- Heather Sanderson Lewis**, Millikin & Fitton Law Firm
- John Kirsch**, Kirsch CPA Group
- Tom Vanderhorst**, City of Hamilton
- John Guidugli**, Hamilton Community Foundation
- Bill Hummel**, Fund Evaluation Group



Karen Miller, director of Hamilton's Boys and Girls Club, is flanked by members of the Club's summertime reading group. The youngsters are challenged to read 50 books over the course of the summer. The Foundation recently made a grant to the Boys and Girls Club for its programming.

BY THE NUMBERS

Assets 2016

| | |
|---|----------------------|
| Current Assets | |
| Cash and cash equivalents | \$ 1,907,989 |
| Current portion of notes receivable | 1,254,697 |
| Prepaid expenses | 456 |
| Total Current Assets | 3,163,142 |
| Property and Equipment, net | 5,379,334 |
| Other Assets | |
| Investments | 68,908,878 |
| Notes receivable, net of current portion | 7,648,580 |
| Accrued interest, net | 316,607 |
| Cash surrender value of life insurance policy | 230,022 |
| Total Other Assets | 77,104,087 |
| Total Assets | \$ 85,646,563 |

Liabilities and Net Assets 2016

| | |
|---|----------------------|
| Current Liabilities | |
| Current portion of grants payable | \$ 2,012,893 |
| Accounts payable | 7,872 |
| Accrued expenses | 71,962 |
| Total Current Liabilities | 2,092,727 |
| Grants Payable, Net of Current Portion | 436,000 |
| Total Liabilities | 2,528,727 |
| Net Assets | |
| Unrestricted | 22,117,698 |
| Temporarily restricted | 42,647,554 |
| Permanently restricted | 18,352,584 |
| Total Net Assets | 83,117,836 |
| Total Liabilities and Net Assets | \$ 85,646,563 |

*Our 2016 financial statements, audited by MCM CPAs & Advisors, are available for review by calling the Foundation office (513) 863-1717.

IMPACTFUL *Community Grantmaking*

Throughout the year, the Hamilton Community Foundation awards grants from its unrestricted funds in response to applications we receive from community organizations. These grants make an impact in the areas of arts and culture, social services, education, youth and community development. In 2016, the Foundation's Board of Trustees made unrestricted grants including the following:



The Hamilton Community Foundation made a \$50,000 grant this year for SELF's microenterprise and microloan program. (Left: Office Manager Ruby Scott and Executive Director Jeffrey Diver).

- Big Brothers Big Sisters of Butler County \$10,000** - for youth mentoring program
- Booker T. Washington Center \$100,000** - for collaborative programming at the community center
- Boys and Girls Club of Hamilton \$55,000** - for youth programming
- City of Hamilton Police Department \$12,500** - for special duty officers in the City's core and historic neighborhoods
- Colonial \$50,000** - for Jamestowne Health and Rehabilitation facility
- Emergency Money Fund \$5,000** - to provide emergency help to those in need
- Fittin Center for the Creative Arts \$25,000** - to support children's programming
- German Village Association \$10,000** - to support the historic German Village Christmas Walk
- Historic Hamilton \$32,890** - for the renovation of the Crawford House
- Hamilton Fairfield Symphony Orchestra \$9,000** - for Tillmann Memorial Concert
- Hamilton Parks Conservancy \$40,000** - to support quality parks in our community
- Hannah's Treasure Chest \$5,000** - to provide supplies for agencies serving children
- Open Door Food Pantry \$5,000** - to help provide food for homeless and hungry

- Parachute CASA \$8,500** - to train CASA volunteers
- Pyramid Hill \$39,365** - for its 20th anniversary programming season
- Salvation Army \$5,000** - to support local programming for individuals in need
- SELF \$50,000** - for micro enterprise and microloan program
- Serve City \$5,000** - to provide meals to homeless and hungry individuals
- Shared Harvest Food Bank \$5,000** - to help replenish community food supplies for the holiday season
- Transit Alliance of Butler County \$25,000** - for the Job Connector transportation to work program
- TvHamilton \$30,000** - for local Hamilton programming

This past year, the Hamilton Community Foundation awarded \$39,365 to Pyramid Hill for its 20th anniversary programming season. Here, Director of Park Operations Shaun Higgins (left) and Director of Arts Administration Jeni Barton (right) visit the sculpture TRAP by Eric Stein.



Two boys enjoying the pool at the Boys and Girls Club.



\$86 million
in net assets

24
new funds established

162
SCHOLARSHIPS
for graduating high school students

WHAT YOU HELPED
make possible in

2016



\$9.2 million
in grants to your community



YPC
members awarded
12 GRANTS
to programs impacting local youth

total contributions
\$5.4 million

WOMEN'S FUND
volunteers awarded
\$17,468
for causes helping women & girls

COMMUNITY Leadership



1



2



3



4

Board of Trustees

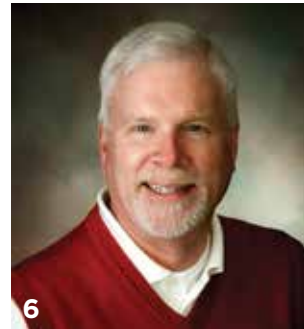
5 Sara P. Carruthers
Community Volunteer

6 James K. Fitton
Community Volunteer

7 Scott Kruger
Attorney, Kruger Law



5



6



7

1 Heather Sanderson Lewis, Chair
Attorney, Millikin & Fitton Law Firm

2 Scott Hartford, Vice Chair
Owner, Hartford Steel Sales

3 Craig F. Wilks, Secretary
President, Wilks Insurance

4 John Kirsch, CPA, Treasurer
Managing Director, Kirsch CPA Group

8 Cindy Parrish
*Service Excellence Ambassador,
Community First Solutions*

9 Thomas B. Rentschler, Jr.
*Head of Marketing,
Swisslog Logistics, Inc.*

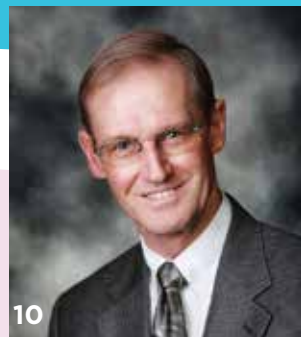
10 Herman (Sandy) R. Sanders (Past Chair)
Community Volunteer



8



9



10



11



12

11 Steve Timmer
Director, Hamilton Parks Conservancy

12 David L. Belew, Trustee Emeritus
Community Volunteer



1



2



3



4



5

Staff

1 John Guidugli
President/CEO

2 Katie E. Braswell
Vice President

3 Betsy Hope
Vice President of Communications

4 Deborah Mast
Administrative Program Manager

5 Daniel J. Sander, CPA
Vice President of Finance



Two great grants that go great together:



Resonating

MARCUM PARK *and the* HAMILTON FLEA

In 2016, the Hamilton Community Foundation made two grants that provide outdoor enjoyment for many: **Marcum Park** and the **Hamilton Flea**. Marcum Park, in the center of Hamilton, was made possible by a multi-million dollar gift from the Joe Marcum family through the Hamilton Community Foundation. The Hamilton Flea was established in 2016 as a monthly urban flea market run by volunteers, and made possible in part by a grant from the Foundation's unrestricted fund.