

HAMILTON COMMUNITY FOUNDATION

Making an impact through projects supporting quality of life



REPORT to the COMMUNITY 2017

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.



On the cover: A gift of \$4 million in 2017 from Joe and Sarah Marcum has resulted in beautiful Marcum Park. Located in the former Mercy Hospital site, the park has become a gathering place for families to enjoy time together. Marcum Park has made a big impact on the quality of life for many families today and for many years to come.

MESSAGE *to the* COMMUNITY

There are many positive changes occurring throughout our community. We know that these great things don't just happen by chance: they happen because they have been carefully planned and thoughtfully executed. Several years ago the Hamilton Community Foundation developed a strategic plan to ensure that we relentlessly pursue meaningful change in our community.

One of the Foundation's strategic initiatives is to improve the quality of life in our community. Each year the Foundation strives to take a leadership role and make significant enhancements to the quality of life experienced by residents of the greater Hamilton area. In this year's *Report to the Community* we have highlighted some of the important work the Foundation has done to move us closer to our goal. The stories shared in this report represent some, but certainly not all, of the amazing and generous people that make our work possible.

In addition to our efforts in the Quality of Life area, the Foundation's strategic initiatives focus on supporting education at all levels, and striving to improve the economic vitality of our residents and our community. We support quality preschool programs in the community, we help prepare first generation college students for success in college and beyond, we assist students and their families as they navigate options for choosing and affording post-secondary education and we provide scholarships to deserving students. We recognize outstanding educators and provide grants to support and enhance their work. We fund support services in the schools to make sure that every student can focus on being academically successful.



Heather Sanderson Lewis
Chair, Board of Trustees

John Guidugli
President and CEO

We recently introduced our Talent Attraction Program (TAP) scholarships which encourage recent college graduates to come to—or return to—our community. This program helps these students with their student loan debt and helps our community attract some of the best and brightest talent available.

We continue to support the Consortium for Ongoing Reinvestment Efforts (CORE) Fund which is helping to redevelop and transform our urban core— one building at a time. We remain committed to supporting the Hamilton Parks Conservancy as they continue to transform our local parks into community showplaces worthy of a community as storied as Hamilton.

We work hard every day to fulfill the objectives of our strategic plan. We are guided in our work by the vision of our Board of Trustees and the generous support of this community. We are successful in making a positive difference because we are committed to the work and confident of the outcome.

SCHMIDT FAMILY *Legacy*



With the
will meet the
generating
Society mem

Joel and Marilyn Schmidt knew there was something special about Hamilton when they moved here from the Cleveland area in the mid 1950s. Hamilton has been their home for most of the past six decades, and they have shared their love for the city through generous donations to numerous projects through the Hamilton Community Foundation.

Joel and Marilyn began their relationship with the foundation for their charitable giving in the 1970s after Joel began managing the local McDonald's Restaurants. "The Foundation was growing, and it was so pleasant to work with the staff that we just wanted to assist with any projects where they needed help," Marilyn said.

Joel & Marilyn Schmidt have exemplified giving back for over 50 years; not just with their financial gifts, but also with their time and talents and a passionate commitment to Hamilton. For example, when the Alexander Hamilton statue was placed in downtown Hamilton, Joel and Marilyn were happy to support it.

"It is a great source of pride for us to drive by that statue, knowing that we helped to make it possible," Joel said. "It helps you to see the community a lot differently when you're involved in projects with the Community Foundation."

Joel and Marilyn have supported numerous quality of life projects such as the City of Sculpture, the Marriott Hotel and ArtSpace project in downtown Hamilton and events such as the July Fourth fireworks and the Festival of Trees. In 2012 the Schmidt's generous charitable work was recognized by receiving the David L. Belew Legacy Award.

The Schmidt's have found a number of non-profits they enjoy supporting as well. "We've been involved with many community organizations such as the Fitton Center and the YMCA," Marilyn recalled. "When they started the Fitton Center, we got involved because we knew it was going to be great for the city. You want to support things like that because they're very visible to the community."

Joel and Marilyn plan to continue to provide for the future needs of the community through their involvement with the Foundation's Legacy Society. They join the more than 200 families or individuals that have made a commitment to leave the Foundation in their estate plans.

"The legacy society really changes your focus from the gifts you give now to helping you realize the importance of supporting the future of the community too," Joel said.

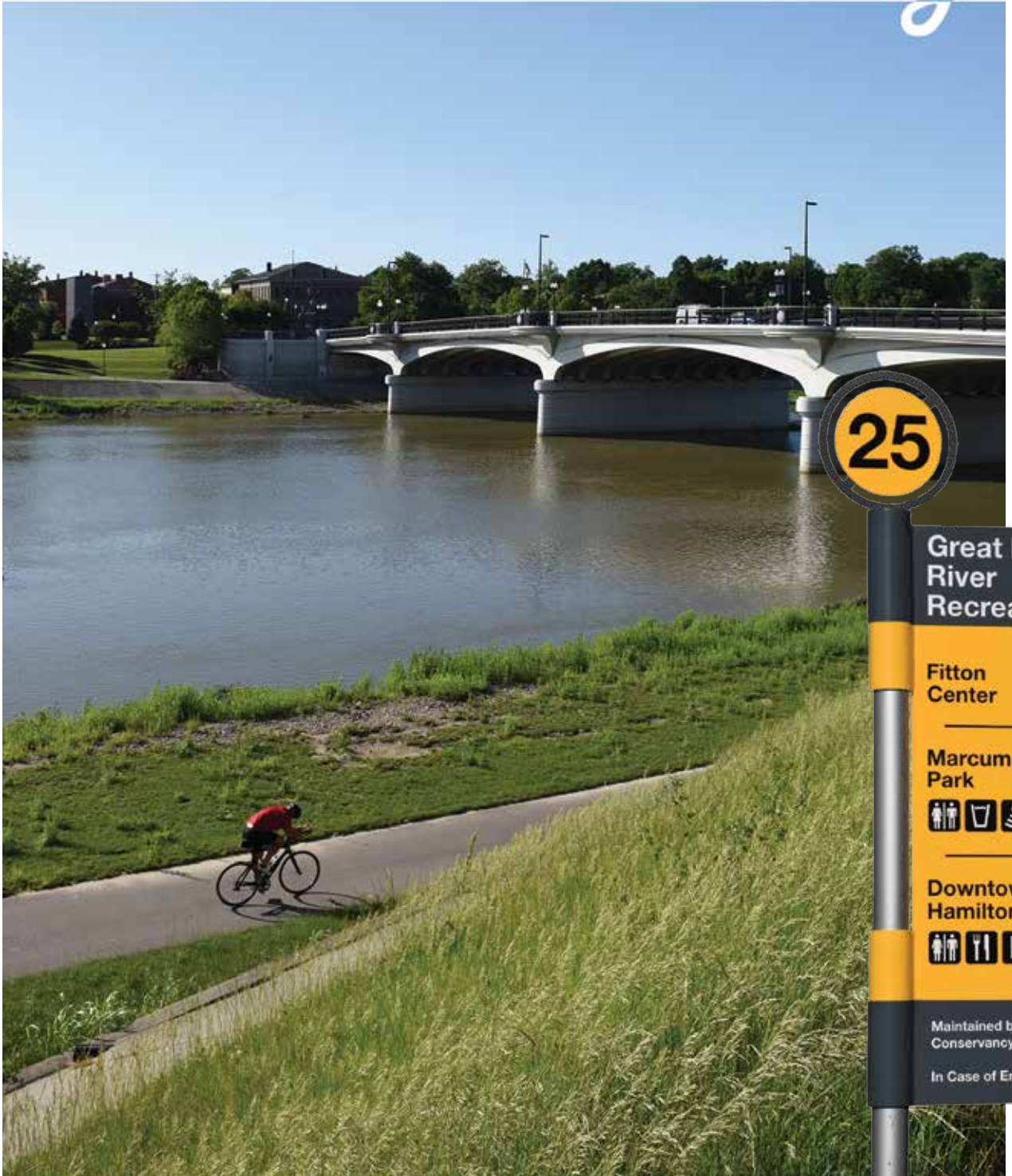
He thinks it's important for young people to learn early on in life about the importance of philanthropy. "Over the years, you learn to know and like people for the good things they do to help the community, and it makes you want to do your part to help too," he explained. "You learn from the examples you see from your elders, and that's very important to the community."

Marilyn said Hamilton has many families that helped to start the community, and want to build on what their ancestors have done. "There also are many new people who join groups where they can see the families that have a history in Hamilton, and it makes them want to help too," she said.

"The legacy society really changes your focus from the gifts you give now to helping you realize the importance of supporting the future of the community too,"

Hamilton Community Foundation's Legacy Society, you can make provisions today that needs of tomorrow. **You can provide** a permanent source of support for your charitable interests while tax savings and even personal income through deferred gifts to the Foundation. **You can become** a Legacy member by naming the Foundation as a beneficiary in your estate plan or through a charitable life income arrangement.

BIKE PATH *Beauty*



Great Miami
River
Recreation T

Fitton
Center

Marcum
Park



Downtown
Hamilton



Maintained by Hamilton Pa
Conservancy

In Case of Emergency Call



The Fuhrman's enjoy the new northern segment of the trail from downtown to Rentschler Forest. "That section really opened up an area that a lot of people had never seen before," Jim said. "You can now ride more than 11 miles along the trail and when you reach either end of it, there are nice neighborhoods to ride through too."

Emily believes many trail users have become fans of the northern segment. "That new section is my favorite because it has a bird sanctuary and lots of wildlife," she

said. "You're instantly in the country as you pass the hydraulic canal."

The Great Miami River Recreational Trail serves as a magnet, drawing people to Hamilton to enjoy recreational opportunities. "It's a very visible part of our new Hamilton, and we seem to be seeing more people out there each year, especially younger people," Jim said. *"You get a sense that these are people who are coming to Hamilton, not just those who live here, but those who find it to be an attraction."*

Emily agrees that use of the river trail is picking up. "We've seen a lot of new fast riders this year, people we've never seen before," she added. "Either they've moved here or are coming to Hamilton specifically to ride the trail."

The Foundation made a substantial gift in celebration of its 50th Anniversary extending the trail from the Fitton Center to Rentschler Forest. Since then, the Great Miami Trail has become a valued quality of life asset in the community. There is so much beauty around the river and its' potential use, community leaders commissioned a riverfront study to take us to the next level of amenities. The vision of creating more recreational activities along the river could become a reality for future generations.

Jim and Emily Fuhrman (pictured above) believe Hamilton is very fortunate to have a gem like the Great Miami River Recreation Trail running through the heart of town. They see it attracting more cyclists, joggers and walkers each year, not just from Hamilton but surrounding communities.

Emily has been riding the trail since it opened in the early 1990s. "What's nice about riding along the river is that when you have the wind at your back, it's like having a hand pushing you along," she said.

Emily and Jim have logged thousands of miles riding along the Great Miami, and they love the fact the trail now extends from Waterworks Park in Fairfield on the south end, through Joyce Park, past the low-level dam and downtown Hamilton's Marcum Park, then along the hydraulic canal all the way to Rentschler Forest MetroPark north of the city.

"It's always different, it's always pleasant, and the best thing is it's only a half mile from our house!" Emily explained. "People who are not on the trail don't see Hamilton in the same way as people who use it regularly. It's a completely different perspective."

For outdoor enthusiasts like the Fuhrman's, the beauty of riding along the bike path is the changing scenery and wildlife. "We're always looking for birds that maybe we saw last year but haven't seen this year," Jim noted. "Osprey are really fun to watch."

trail



3 mi



2 mi

arks

911

StreetSpark MURALS *spice up*



HAMILTON

You may have seen the large mural of a *vintage green Cadillac* along High Street as you drive toward downtown Hamilton. It's one of three new murals developed this year by StreetSpark, a partnership between the Fitton Center for Creative Arts and the city of Hamilton. The Hamilton Community Foundation is one of the funders of StreetSpark, providing a \$25,000 grant last December.

A committee that helped develop Art Space in downtown Hamilton decided it needed a new project, and the idea of prominent outdoor murals came about. "We had a wide variety of arts people and city officials involved," explained Jen Acus-Smith, StreetSpark Program Manager. "The city came on board as a funder and Fitton Center became the umbrella organization."

StreetSpark developed five murals in 2016-17 including one of the late Reds Hall of Famer and Hamilton native Joe Nuxhall, on the side of the Clark Sporting Goods store on B Street. Jen is fortunate to have a group of people to help her seek new locations. "They help me scout for buildings that are in fairly good condition and that are visible from the street, which is our main focus," Jen said.

In addition to the Nuxhall mural in 2017, Street Spark added one on the former Marshall Electric Building on Main Street and the McDulin Bird on the side of the Hamilton Parking Garage near Rotary Park. This year's additions include the "Hey Caddy-O" mural by Miami University-Hamilton instructor Nicole Trimble on the Jeff Pohlman Tire & Auto Store on High Street, a mural by Christian Dallas on North Second Tap and Bottle Shop, and Stephen Smith's mural at Miami Hamilton commemorating the 50th anniversary of the campus.

"One of our goals was to show a diverse amount of art styles that offer different points of view," Jen said. "Hamilton has a diverse population, so we wanted the murals to reach more than one segment of the community."

The number of murals that are added in a given year depends on funding and the size of the buildings. In the past, Acus-Smith said artists submitted designs that didn't fit the size of the buildings involved.

"That's why we were a little stricter on requirements this year," she noted. "We also started this year giving a suggested theme for each of our mural sites."

Acus-Smith is pleased with the number of artists submitted proposals. "We've had anywhere from 30 to 50 artists entering designs, and they can submit a design for each location," she said. "Some will focus on just one building while others submit more, so we may have to look through 50 to 75 designs in selecting the ones we want."

Jen often sees people taking photos of their favorite murals and feels they have become part of Hamilton's fabric. *"The murals are becoming iconic because the images are uplifting, colorful and optimistic, and that's how many people in Hamilton are feeling now."*



Marcum Park: the *heart* of Hamilton's parks



If you've been to *Marcum Park*, you may have wondered who developed the heart-shaped M sculpture that greets you near the Dayton Street entrance. Steve Marcum came up with it but says that was not really his intention.

Steve's parents, Joe and Sarah Marcum, agreed to fund the six-acre urban park on the site of the former Mercy Hospital in Hamilton, at the urging of Hamilton Community Foundation President and CEO John Guidugli and City Manager Joshua Smith. The park opened in the spring of 2017, and the new heart-shaped M was added this year.

"When we started discussing a sculpture, we had absolutely no idea what we wanted," Steve said. "We reached out to professional sculptors nationwide, but no one showed a real interest. I was at a meeting to discuss the topic and started drawing the design myself on a piece of paper." Steve told the committee: "I think this will be our new sculpture," and they all agreed.



The bottom portion of the Marcum Park "M" sculpture is in the shape of a heart, and it sits amidst the fountains that have been a popular attraction for children. "I wanted to have the sculpture have a sort of raining feature, so it fits perfectly with the fountains," Steve explained.

Marcum Park includes a large green space as well as a second water feature in the rear of the park. "That was created, approved and designed by my niece, Niki Motley, because she was interested in developing an area that children would enjoy," Steve said.

The Community Foundation believed the urban park would improve the quality of life and draw people to downtown for summer concerts or the Hamilton Flea on weekends. It has done exactly that for German Village residents like Brandon and Missy Saurber, who frequently take their children to the park.

"It's beautiful yet still engaging for a multitude of ages," Brandon said. "Kids certainly have fun in the water features. On mornings when they have the Hamilton Flea, you might see 60-70 people doing yoga, folks throwing frisbee or playing ball, so there's both adult recreation and things for children."

Missy Saurber is proud that people come from far away to see the park. "I love the hub it has created, so we're lucky to live nearby," she said. "It draws in our friends, family and

people who live out of town. It's awesome to come home from work and bring the kids down here to play."

Brandon and Missy believe when the new Marcum Apartments open this fall, Marcum Park will be an even greater attraction. "It's going to be wonderful to see people out on their balconies during concerts or Hamilton Flea, and it will add to the charm having them come here with their kids and dogs," Missy said.

Because he works for the city of Hamilton, Brandon sees the economic impact of the park as well. "*The music and other events are game changers, and it's hard to imagine where we would be without this space to host events,*" he said.



COMMUNITY *Leadership*

Board of Trustees: left to right: Cynamon Trokhan, Steve Timmer, Craig Wilks, Scott Harford, Heather Sanderson Lewis, Bob Long, Scott Kruger, Tom Rentschler, John Kirsch and Niki Motley. Seated front row: Cindy Parrish and Dave Belew, Trustee Emeritus

Establish **Charitable Fund** to fit your charitable goals

*By creating a fund with the **Hamilton Community Foundation**, you create an easy, effective and powerful way to impact our community—today and for generations to come.*

You can focus on specific organizations, issues or regions, or create a fund with a flexible purpose. Funds can be created in as little as one meeting, with a short fund agreement and a single gift.

*More than **700 charitable funds** are held at the Foundation making a difference in our community. As a vibrant and connected community leader, the Hamilton Community Foundation is ready to help **transform your passion for giving** into greater impact!*

Staff

John Guidugli, President & CEO

Marcum Park connects people to each other and to the growing vibrancy of our downtown.



Katie Braswell, Vice President

With the new enhancements to the Third Street Plaza, it has become an additional area for festivals and events.



Dan Sander, Vice President Finance

The Michael J. Colligan Lodge continues to be an attractive facility for residents to gather for family celebrations.



Debbie Mast, Administrative Program Manager

RiversEdge has quickly become a venue where audiences can expect to hear diverse genres of music from rock and blues to country and tribute bands.

BTW sees tremendous *growth* in youth programs



When the YMCA began managing the *Booker T. Washington Community Center* in 2013 they requested Foundation funding to help reach their goal of serving 150 children. Five years later, Foundation funding has helped them exceed their goals and BTW now serves over 300 young people and more than 200 adults.

As the hub of the community, BTW brings enhanced quality of life opportunities to those using the center. In collaboration with the YMCA and other community partners, the Foundation's annual support has been instrumental in ensuring that quality programming is meeting the needs of the community.

"I have a great connection with a lot of people in our community because I grew up in this neighborhood," said Booker T. Washington Director Samy Broyles. "I grew up with the parents of many of the kids that come here today, so I know how to connect with them."

Broyles has found word of mouth to be an effective tool in telling parents about BTW's variety of recreational and educational opportunities. More kids are coming to play Little League baseball, basketball, participate in the YMCA's recreational baseball and soccer programs or take swimming classes.

"We try to be inclusive and to have a diverse staff, and it helps when people come here and see people they can relate to," Samy said. He wants to add more Hispanic staff members to serve that growing population.

"We do have a strategic partnership with Hamilton City Schools to provide English as a Second Language courses at Riverview Elementary this summer, and we now have 40 kids from that program coming here for fun activities," he said.

The number of kids participating in summer camp increased this year because Broyles was able to add field trips to the Freedom Center in Cincinnati plus free tickets to a Cincinnati Reds game and a visit to Wright Patterson Air Base.

The United Methodist Church Food Ministry has given BTW a boost for the past two summers by providing meals for kids. "We know that for some of our kids, their only meal of the day is here, so this program is huge because it gives them lunch plus a snack before they go home," he said.

Summer camp has many other partners such as programs by the Boy Scouts and Girl Scouts, 4-H, and the Boys and Girls Club's summer reading program where children earn a pizza party by reading 50 books.

Education is a huge part of Booker T. Washington's program during the school year. When the Foundation and other community partners launched a pre-school program at BTW five years ago, it had six or seven students. There were fourteen participants last

school year, and serious discussions are underway to offer two pre-school classes in the fall and extend the hours.

"We think an all-day session would be the best way to serve our community," Samy explained. "Some parents couldn't put their kids in our afternoon pre-school due to work conflicts. I think pre-school will really grow if we can make the costs work for all-day classes."

Samy's pride and joy is the After School Program with the Boys and Girls Club. Five or six Miami University students work with the club as homework helpers. *"We've seen a direct correlation between how kids are performing in school and the number of hours they spend in the homework help room,"* he said.



Foundation Field



Baseball fans don't have to go far to experience quality baseball in Hamilton. *A state-of-the-art baseball field* adjacent to the Booker T. Washington Community Center is the home to both Miami University's Harriers and Hamilton Joes baseball teams.

According to Darrel Grissom, Hamilton Joe's GM and baseball coach for Miami Hamilton, Foundation Field is one of Hamilton's best kept secrets. Named after legendary Cincinnati Red's baseball player and broadcaster, Joe Nuxhall, the Joes are Hamilton's Premier Collegiate baseball team.

A 600 seat stadium, Foundation Field was a gift from the Hamilton Community Foundation. The field was built using funds donated from the Hamilton Community Foundation and in partnership with Miami University Hamilton, the City of Hamilton and the Booker T. Washington Community Center.

Today, Foundation Field is one of the many quality of life amenities in the community. The site also includes a beautiful park with a splash pad, upgraded play equipment, an indoor swimming pool and little league fields. The many amenities have resulted in increased membership and excitement around the new program-

ming and refreshed BTW Community Center.

"Because of this field, we are able to recruit quality players and bring affordable baseball for families to enjoy," said Darrel. "Families can come out and be up close and personal with our players; many of which go on to the minor and major leagues. To date, more than 40 players have signed professional player contracts and three have gone into the major leagues.

Hamilton Joes Baseball Club was organized to provide area college baseball athletes - and interns in related sports fields- the opportunity to advance their careers. The intent of the league is to provide student athletes the opportunity to improve their baseball skills in a competitive summer league made up of college players.

Now in his 20th season of coaching Grissom credits the success of the program to the many volunteers and interns. "It takes a lot of people to run this program. I have many good coaches and other staff around me to make this a success."

Darrel has been involved with Foundation Field since its inception. The improvements over the years have brought many opportunities for college students pursuing a career in baseball as well as other careers associated with baseball. His passion for the game and his players comes through loud and clear when he speaks about how excited he is about having the opportunity to play in a facility like Foundation Field.

"I guarantee if you come once to a game you will enjoy it so much you will come back time and time again."



by the numbers



HCF Investment Performance

(as of December 31, 2017)	1 YR	3 YR	5 YR	7 YR	10YR
Hamilton Community Foundation	17.3%	6.8%	9.0%	7.7%	4.6%
Benchmark	16.8%	7.6%	9.6%	8.4%	5.0%

HCF Current Asset Allocation

(as of December 31, 2017)

	Hamilton Community Foundation Target	Hamilton Community Foundation Actual
Global Equities	69.0%	69.9%
Global Fixed Income & Cash	20.0%	19.5%
Real Assets	1.0%	0.6%
Diversifying Strategies	10.0%	10.0%

Assets 2017

Current Assets

Cash and cash equivalents	\$ 1,568,420
Current portion of notes receivable	720,697
Prepaid expenses	456

Total Current Assets 2,289,573

Property and Equipment, net 5,143,270

Other Assets

Investments	76,618,737
Notes receivable, net of current portion	7,638,580
Accrued interest, net	364,820
Cash surrender value of life insurance policy	98,847

Total Other Assets 84,978,425

Total Assets \$ 92,411,268

Liabilities and Net Assets 2017

Current Liabilities

Current portion of grants payable	\$ 1,803,303
Accounts payable	2,849
Accrued expenses	77,779

Total Current Liabilities 1,883,931

Grants Payable, Net of Current Portion 416,500

Total Liabilities 2,300,431

Net Assets

Unrestricted	24,466,914
Temporarily restricted	48,530,624
Permanently restricted	17,113,299

Total Net Assets 90,110,837

Total Liabilities and Net Assets \$ 92,411,268

*Our 2017 financial statements, audited by MCM CPAs & Advisors, are available for review by calling the Foundation office (513) 863-1717.

CORE fund continues *downtown revitalization*



In 2015, to help accelerate downtown revitalization and reduce the financial barriers to investing in the urban core, a public-private partnership consisting of the Hamilton Community Foundation, City of Hamilton and local lending institutions created Consortium for Ongoing Reinvestment Efforts or CORE Fund.

The primary function of the CORE Fund is to provide financial resources for qualified residential and commercial real estate projects within the urban core. By leveraging a multitude of financial tools into one powerful partnership, the CORE Fund has maximized results of strategic projects that have been key factors in the revitalization of the city.

One of the CORE Fund projects was the former Fifth Third Building at Third and High Streets which had been vacant since 2012. The partners of Kirsch CPA realized they were outgrowing their Fairfield location, and they knew it was time to begin shopping around for a new location. John Kirsch concedes downtown Hamilton wasn't on their radar, until city officials convinced them otherwise.

When the partners told the staff that downtown Hamilton might be their destination, John said there were some raised eyebrows. "When we signed the lease for our new facility, not a single member of our team lived in Hamilton, and quite a few had never been to down-

town Hamilton," he said. "But our team came around quickly to the move, and their level of excitement was significantly more than I expected."

"As a testament to what has been going on in the city prior to us being there, the reaction of our clients has been that Hamilton is a great place to be, and they understand why we chose it," Kirsch explained.

John credits city leaders and the Hamilton Community Foundation with capitalizing on a growing national trend of younger people wanting an urban environment with everything in close proximity. "A group of community members basically decided they weren't going to apologize for Hamilton anymore, so they've made downtown and Main Street a place where people want to come," he said.

John praises previous members of the Hamilton Community Foundation for having the foresight to expand its mission of charitable support for non-profits to put seed money into many downtown projects. "It was an unusual thing for the Foundation to do, because most foundations aren't involved in economic development," he noted. "Having the vision and courage to make that effort will continue to have a positive impact."



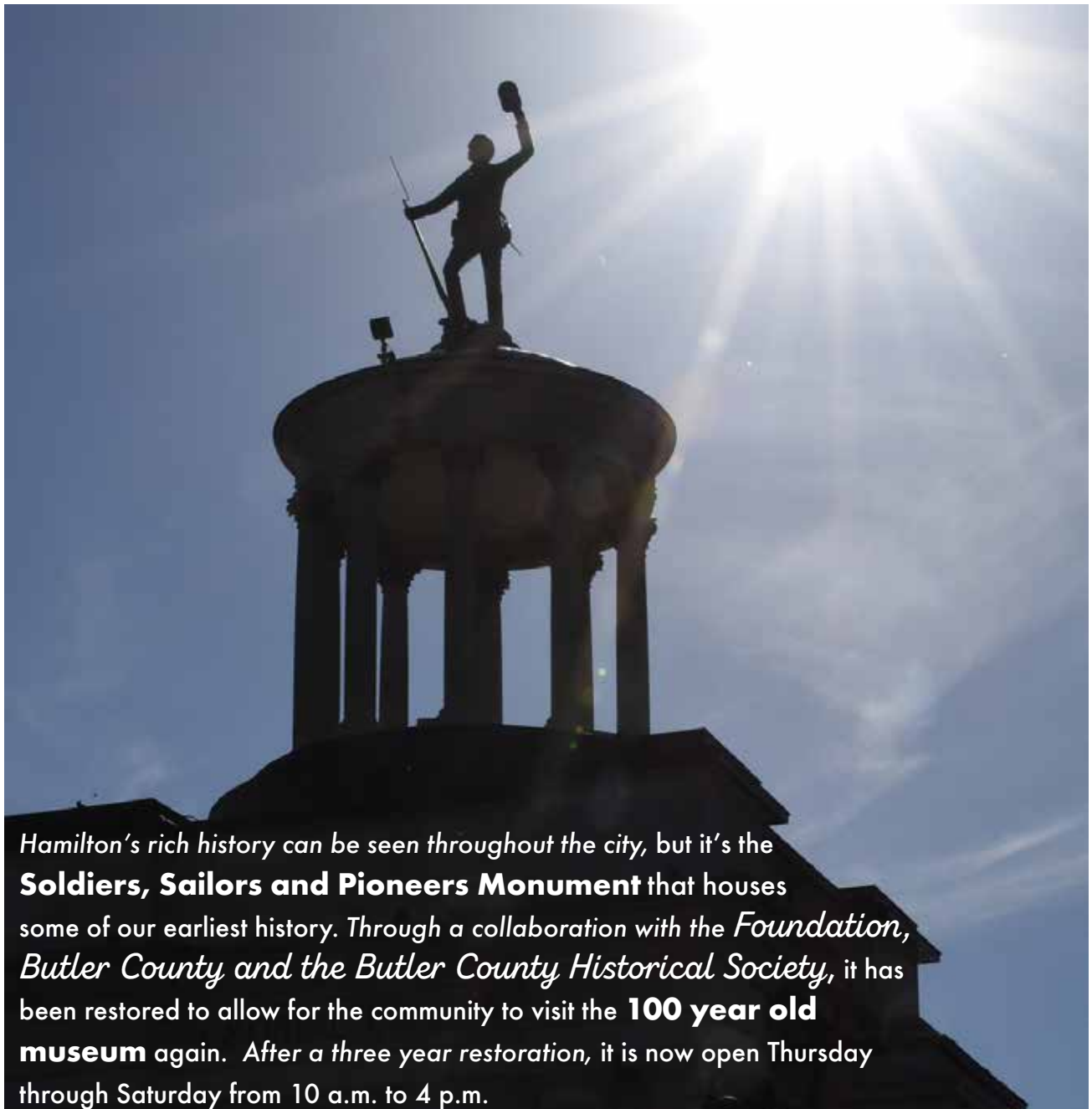
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*Hamilton's rich history can be seen throughout the city, but it's the **Soldiers, Sailors and Pioneers Monument** that houses some of our earliest history. Through a collaboration with the *Foundation, Butler County and the Butler County Historical Society*, it has been restored to allow for the community to visit the **100 year old museum** again. After a three year restoration, it is now open Thursday through Saturday from 10 a.m. to 4 p.m.*