



HAMILTON  
Community  
Foundation

*Increasing Impact through Growth*



**Report to the Community 2022**





## 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.*

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# MESSAGE FROM LEADERSHIP

Dear Friends,

Early in 2022 the staff and trustees of the Hamilton Community Foundation created a new strategic plan to guide our work over the next several years. The overarching theme of the new plan focused on the need to increase our assets in order to increase our impact. We decided that the assets to be increased were not limited to financial assets, but also included assets related to community leadership, assets related to sharing our story with the community, and assets related to effectively staffing the Foundation. With the adoption of this new plan your Community Foundation is focused on strategically growing our organization to become a stronger and more impactful force in our community.

One of the ways we grew in 2022 was through the creation of two new affiliate organizations. The Ross Community Foundation was created by a dedicated group of passionate individuals with a desire to raise dollars in the Ross community to support projects in the Ross community. This effort was led by longtime Hamilton Community Foundation supporters Martha and Dana Mehl, who engaged their friends and neighbors in the rewarding work of creating a new community foundation. In what seemed like no time at all, the Ross Community Foundation created an advisory board, policies and procedures, a logo, grant making opportunities, and perhaps most amazingly, raised over \$500,000 to support the work of this new affiliate. They have accomplished so much in such a short time and plan to build on that success in the coming years.

The second affiliate created in 2022 was through our association with the Fairfield Community Foundation (FCF). FCF was created over 20 years ago to serve Fairfield and Fairfield Township. Since then FCF provided support and leadership in the communities it served. Following discussions with their board last year, it was determined that joining the Hamilton Community Foundation as an affiliate would be a win-win proposition. FCF can continue to serve the community, and the Hamilton Community Foundation can provide assistance with staffing and donor support. We look forward to strong growth as we begin this exciting relationship with our new Fairfield partners.

In addition to creating affiliates in 2022, we worked to strengthen our team at the Foundation. To increase our impact, we have begun to strategically add additional staff in critical roles. With the addition of several strong staff members, we are now better poised to respond to the needs of our communities and the needs of our donors.



One of the real joys of the strategic planning process was the opportunity to hear from so many donors, grantees, professional advisors, and community members. Through surveys and personal conversations, we learned that the community we serve is pleased with the work we do, supportive of our mission, and happy to engage with us as we work to improve the quality of life throughout our community.

As you look through the pages of this report, we hope that you will appreciate the impact the Hamilton Community Foundation continues to have. Our work ensures critical funding for non-profit organizations, promotes scholarships for young people as they pursue their educational goals, allows us to connect donors with causes that they are passionate about, and presents ongoing opportunities for growth and innovation throughout our region.

We are confident that our strategic plan provides a great roadmap for our work. But to ensure our success we need to engage the entire community. We ask that you join us in the important work that we do each and every day. We invite you to become part of your Community Foundation. We invite you to be an asset to engage with us to have a positive impact in our community.

Cynamon Trokhan  
*Chair, Board of Trustees*

John Guidugli  
*President and CEO*





## VISIONARY IMPACT

*The Hamilton Community Foundation is led by successful, visionary individuals who recognize opportunities for positive growth. The 2022 Board of Trustees is comprised of 11 local community and business leaders.*

## Meet our BOARD of TRUSTEES



**Cynamon Trokhan**  
Chair



**Robert Long**  
Vice Chair



**John Kirsch**  
Secretary



**Andrew Schuster**  
Treasurer



**Jason Crank**



**Chamina Curtis**



**Vaden "Woody" Fitton**



**Scott Kruger**



**Helen "Niki" Motley**



**Cynthia V Parrish**



**Susan Vaughn**

## Meet our TEAM



**John Guidugli**  
President and CEO



**Katie Braswell**  
Vice President



**Crystal Reece**  
Director of Finance



**Amy Berlean**  
Director of  
Communications



**Kasey Rouse**  
Scholarship Program  
Manager



**Debbie Mast**  
Finance Associate




# STRATEGIC PLAN SETS PATH FOR NEXT FOUR YEARS

*With a new Strategic Plan as a guide, the Hamilton Community Foundation moved swiftly to implement the plans and objectives identified through the planning process. The goals were outlined as such:*

**Goal:** Serve as a strong, effective community leader.

**Implementation:** President and CEO John Guidugli continued to serve as a community leader in 2022 by co-creating the LINKS program with the Greater Hamilton Chamber of Commerce, continuing a leadership role in CORE and working closely with City leadership on economic development and community vitality initiatives.

In 2022 the LINKS program was created to inspire continued collaboration among top leaders locally. With an inaugural class of 16, the LINKS program addresses the most critical and timely needs of the community. The three goals of LINKS are:

- 
1. Sharpen leadership skills through interesting information and activities
  2. Tackle relevant topics through discussion with local leaders
  3. Build a strong cohort creating trusted relationships among Hamilton leaders

**Goal:** Continue financial asset growth.

**Implementation:** The Hamilton Community Foundation team worked with donors to create more than 25 new funds in 2022.

**Goal:** Increase awareness and understanding of the Hamilton Community Foundation.

**Implementation:** The Hamilton Community Foundation team worked with a marketing consultant in 2022 to identify key strategies for promoting the Foundation. Surveys were conducted with key stakeholders, the Foundation's presence on social media expanded and brand guidelines for the Foundation were established.

**Goal:** Ensure adequate staffing to effectively meet community need.

**Implementation:** Potential positions were identified for assisting in the growth of the Foundation. In 2022 the new Director of Communications position was created and employed with more positions planned for the future.





## Meet Our Affiliates

The leadership of the Hamilton Community Foundation were presented with two opportunities for growth in 2022 that resulted in the adoption of two affiliate organizations. The Ross Community Foundation and the Fairfield Community Foundation came under the HCF heading, opening doors to further local impact.

Affiliation with HCF affords the Ross and Fairfield Community Foundations the opportunity to maintain their own Board and their own local focus. In addition the HCF team performs all administrative functions, provides affiliates with knowledge and expertise and lends its reputation and professional accreditation status.

## FAIRFIELD COMMUNITY FOUNDATION ADVISORY BOARD



Justin Krueger  
FACHE, Chair



Ronda Croucher  
Vice Chair



Robert Jung  
Treasurer



Phoebe Kerby  
Secretary



Brian Begley



Cynthia Koenig-Daggs



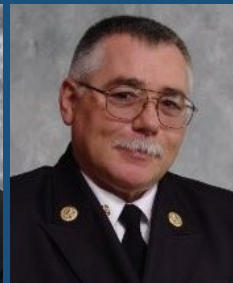
Kim Hauer



Doug Robertson



Lou Silverberg



Chief Tim Thomas



Krystal Tipton



Local Support = Local Impact is the rallying cry of the Fairfield Community Foundation. Established in 1999 the Fairfield Community Foundation has long been supporting the City of Fairfield and Fairfield Township through grants and scholarships. With an established Board of esteemed professionals, the Fairfield Community Foundation sought affiliation with HCF in order to grow the Fairfield Community Foundation in scope and impact.

*The Fairfield Community Foundation brought with them \$5 million in assets.*





The passion project of Ross residents Martha and Dana Mehl, the Ross Community Foundation was established in 2022 to support the Ross community. As Hamilton Community Foundation donors, the Mehls reached out to the Hamilton

Community Foundation for guidance and ultimately found that affiliation with HCF was the right path for their organization.

*In just six months the Ross Community Foundation board raised \$550,000 toward their unrestricted Community Impact Fund, enabling the Foundation to award its first local grants in 2023.*

## ROSS COMMUNITY FOUNDATION ADVISORY BOARD



RCF Board members (from L to R): Martha Mehl, Chair, Dana Mehl, Laura Hiler, Joe Conrad, Erin Wilson, Secretary, Walter Wilson, Treasurer and Wendy Fetters, Vice Chair.



# Why Give to the Hamilton Community Foundation?



## A Local Attorney's Perspective

Local Attorney and Advisor **Cathi Evans** explains why the Hamilton Community Foundation is a great option for clients.

As an advisor, I meet my clients where they are. Some families are genetically philanthropic – walking into my office with definable goals and plans. Some families struggle to identify their passion, employ philanthropy in a scatter-shot sort of way, and react rather than plan. And, of course, there is every kind of family in between. A gift to the Hamilton Community Foundation is a perfect solution for all types of givers.

Let's take gifts to a donor-advised fund for starters. Quick primer – a donor-advised fund created by a donor can be a target for charitable dollars annually or at the occurrence of an "event" (sale of a business or an inheritance, for example) without requiring a firm position on the ultimate recipient at the creation of the fund. This allows an indecisive donor to punt the decision of what cause to benefit into the future. On the other hand, these funds allow a more decisive donor to reap the tax benefits of a large gift to the Foundation now while funding donations to the charity of their choice later. All types of donors can use these funds to address needs as they arise in the community in the future – not just in the year of the gift.

Gifts to established funds, whether field of interest or unrestricted, can help fund more generalized charitable intentions. Economic development, scholarships, human needs – these are all categories, and more, in which the Hamilton Community Foundation's fine staff have high levels of local expertise. When a family desires to benefit the community, but wants to leave it to the experts to determine best



**Catherine Evans, Esq.**  
Millikin & Fitton Law Firm

*"As an advisor in this community, it is impossible to overstate the value and service the Hamilton Community Foundation provides to its donors and the Hamilton area," she says.*

uses, these gifts are ideal. Many of these funds are also endowed, which means they exist in perpetuity and will ensure benefit to the community forever.

The Hamilton Community Foundation can also be the recipient of a wide range of gifts, during life and at death. Cash is the most common gift, of course, but provision can be made for gifts of stock, life insurance policies, retirement assets, and more. This flexibility may provide tax benefits beyond the normal income tax deduction, can help manage future estate tax liabilities and can provide a family with support in simplifying their portfolios.

Gifts to the Hamilton Community Foundation can serve other purposes beyond philanthropy and tax. The professionals at the Foundation provide a high level of service when they

help a family design their gift, which is something a gift to a large, remote charity may not afford. Gifts to the Foundation also assist in creating a connection to the community across generations, reinforcing charitable giving as a core family value, teaching younger family members how to collaborate with their neighbors and other local partners, and leaving a legacy – both for charitable purposes and to honor the family itself.

As an advisor in this community, it is impossible to overstate the value and service the Hamilton Community Foundation provides to its donors and the Hamilton area. The variety of funds and gifting options available make it the number one tool in the planning toolbox when working with families. We are truly fortunate to have such a valuable resource at our disposal.



# Increasing Impact Through New Funds

*Established in 2022*

Alice E Smith – Abate Scholarship Fund  
Ann and William Coombs Civic Beautification Fund  
Casual Pint Hamilton Charitable Fund  
Dean Curtis Live Well Foundation Fund  
Dr. Carole J Kuhn Sculpture Fund  
Evan Huxsoll Memorial Scholarship Fund  
Fairfield Community Foundation Community Grant Fund  
Fairfield Community Foundation Education Fund  
Frank and Joanne Pfirman Fund  
Gilmore Metropark Improvement Fund  
Hamilton Industrial Might Fund  
Hamilton LINKS Fund  
HBG History Scholarship Fund  
Motley Advised Fund  
HUGS Kids Cavity Free Club/Healthy Eating Fund  
Janet Coombs (Joyner) Endowed Chair for Clarinet at the Butler Philharmonic  
Jason and Katharine Crank Family Advised Fund  
Jo Jo Schwarz Memorial Fund  
Lee H Parrish and Jacqueline L Raisch Parrish Advised Fund  
Lowe Family Fund  
Michael R and Kelli M Kurtz Family Fund  
Pamela and Timothy Naab Advised Fund  
**Ross Community Foundation Community Impact Fund**  
SRBP Fund  
Karen Metcalf Memorial Scholarship Fund  
Todd Stidham Carpentry Scholarship Fund  
Trayson Fund

\*Denotes Fairfield Community Foundation Funds

\*Denotes Ross Community Foundation Funds



## Creating a Fund *and Making an Impact*

Through the Hamilton Community Foundation and its affiliates, you can establish a variety of funds for individuals, families, businesses and community organizations. You can choose the fund that best accomplishes your goals for giving. Opening and maintaining a charitable fund is simple and the Hamilton Community Foundation team is here to ensure that your goals are met today and into the future.

Start with a gift of \$5,000 or more in cash, stock or retirement assets (\$10,000 for a scholarship fund) and begin your charitable journey of impacting the community for the better.

Vehicles for giving: cash gift, donations of publicly traded securities, closely held stock, retirement assets, interests in limited partnerships, real estate, life insurance, tangible personal property and private foundation assets.

*The Hamilton Community Foundation wants to be your partner in giving. Let our team ignite your philanthropic passion for your community.*



## Supporting Charity through Business



**Ann Marie Cilley** left her job at Goodyear Tire to open the Casual Pint Craft Beerstro in the Marcum apartment building in Hamilton right before the Covid pandemic. In 2022 Cilley created the Casual Pint Hamilton Charitable Fund. In a sense, we have her father to thank for both.

“My dad got out of the Navy and came to Hamilton to visit with someone,” says Cilley, “and he fell in love with the community. I think that just stuck with me all this time.”

When she decided she wanted to open her own business she was thrilled to find space in Hamilton, the city her dad had loved.

“I wanted to be in a very strong community,” she says. “My local customers kept me alive during the pandemic and I am tremendously grateful for that.”

That gratitude was one of the reasons Cilley decided to create a charitable fund with her business.

“Giving back helps me sleep better,” she says. “I wanted my business to be about something bigger than business.”

Cilley decided to establish a charitable fund through the Hamilton Community Foundation, another decision she says helps her sleep better.

“Having my charitable giving go through the Community Foundation provides peace of mind, simplicity and adds credibility to our process,” she says. “I would never feel comfortable doing something like this without that level of knowledge and expertise.” In its first year the Casual Pint Hamilton Charitable Fund gave \$20,000 to community organizations and initiatives. Some of the organizations are those somehow affiliated with customers and others are simply passion projects like diversity, equity and inclusion causes.

“Ann Marie has been a joy to work with,” says Katie Braswell, Vice President of the Hamilton Community Foundation. “She has a contagious sense of community spirit and she has put her heart and soul into both her business and into her charitable fund.”

Cilley says she hopes to grow the Fund in the coming years so that she can increase her impact in the community.

*“Creating the Fund has been one of the best decisions I’ve made since opening the business,” she says.*

“Creating the Fund has been one of the best decisions I’ve made since opening the business,” she says. “Not only do I get to support this community that generously supports me but my business benefits from some goodwill marketing. It’s a win-win situation.”

Thank you Ann Marie Cilley for your generosity of spirit and for trusting the Hamilton Community Foundation with your charitable goals!





The Huxsoll Family, left to right: Alivia, Mike, Tricia, Izzy, Evan

## Supporting Charity in Memory

### *Evan Huxsoll*

The Hamilton Community Foundation, and the community at large, has been the beneficiary of many donors who create funds to honor loved ones. In each and every case it is inspiring to sit with someone and hear them tell the story of why their loved one should be remembered in this way. In each and every case it is humbling to be the recipient of so much generosity of spirit.

Evan Huxsoll's light will shine forever in the memories of those who knew him. It will also shine on in the scholarship established in his name. His parents Mike and Tricia have made sure of that.

Evan was training and studying in the Fire Tech program at Butler Tech at the time that he died. According to his parents he was eager to begin a career of helping others and intended to become a paramedic in the long run. He was 17 years old.

"He was the kind of kid the world needs more of," says Tricia Huxsoll. "Everyone who knew him considered him a best friend."

*"He was the kind of kid the world needs more of," says Tricia Huxsoll.  
"Everyone who knew him considered him a best friend."*

Here's a story that exemplifies his heart. Evan was a music lover. He loved all kinds of music. At wrestling practice the coach would play a random song and whomever guessed the song correctly could get out of doing dreaded wall sits. Evan got it every time. But he still did the wall sits with his teammates.

When Mike and Tricia were faced with the unthinkable, remarkably it didn't take them long to decide to create a scholarship fund in Evan's memory. Amidst their loss they chose to give.

"We got such an outpouring of love and support," says Mike, "we wanted to pay it forward. This way we keep Evan's legacy and name alive."

The Evan Huxsoll Memorial Scholarship was established to help a burgeoning firefighter/paramedic.

"It's what he would have wanted," his parents say.

Sometimes a person is so big, so memorable and so dynamic that you don't even have to meet them to understand their goodness. That is the way it feels getting to "meet" Evan through the stories of his parents. We are genuinely grateful to the Huxsoll family for allowing us to keep Evan's memory alive in this way. His legacy is safe with us.

*A Fairfield Community Foundation Fund*



# Generational Philanthropy – *Creating a Legacy of Giving*



**Jake & Ally Fetters, Wendy & John Fetters, Samantha & Jared Fetters**



**Jake Fetters, Woody Fetters, Mary Lou Fetters, Jared Fetters**

For many people who engage regularly in their community, the activity is a learned one. Just like any other habit picked up from watching our parents, philanthropy is often the result of a learned behavior in the home. At the Hamilton Community Foundation that spirit of generational philanthropy is how many of our donors came to be community champions.

That is certainly the case for Wendy Fetters. Wendy is a community volunteer, a donor and most recently the Vice Chair of the newly created affiliate organization the Ross Community Foundation. Any one of those would be admirable. Put everything together and it makes you wonder, what makes a person give so much?

Enter Wendy's parents, Alan "Woody" and Mary Lou Woods. The Woods were heavily involved in the Lions Club in Ross. Woody was an active Lions Club member and Mary Lou a dedicated member of the Lioness. Through this

organization the two gave to their community in immeasurable ways. The Lions Club awarded Woody with the Lifetime Achievement in 2010 as a result of the hours and hours he gave to the Club and to the community.

"We did fundraisers, which we loved," says Mary Lou. The fundraisers were to support eye exams for school children and scholarships for Ross students. Mary Lou says her late husband also did a lot for the community through the trucking company that he built, Alan Woods Trucking.

"Just little things you do for other people," she says. "In small towns we take care of each other."

Mary Lou says she and her husband didn't intentionally teach their children to be philanthropists, they just participated in many things as a family, including community related activities.

"We just grew up believing that giving back to your community is something you do," says Wendy.

For Wendy and her husband John, the family dynamic of lifting up and supporting their community continues through their sons Jake and Jared.

"I've been doing things for the community since I was little," says Jared. "If my mom and dad were involved in something it's likely we were involved too."

When the Ross Community Foundation needed a logo Jared stepped up to offer his graphic design expertise, proving that he, indeed, has the same charitable genes of his parents and grandparents.

For the Hamilton community, and now the Ross community, the Woods/Fetters family is a shining example of how to set the exact right example, sometimes without even trying.

Thank you Alan and Mary Lou Woods for laying the foundation of generational philanthropy in your family.



The Youth Philanthropy Committee of the Hamilton Community Foundation is a group of students (9-12 grade) from Hamilton High School, Badin High School, Ross High School and New Miami High School who meet once a month for 10 months. During their meetings the Committee hears from local organizations who serve youth, they volunteer and they discuss ways in which they can serve the community in their roles on the Committee.

YPC is a long standing tradition for the Hamilton Community Foundation, dating back to 2005 when the Board of Trustees established the program to promote philanthropy among our youth. Members of the committee are accomplished students who have expressed an interest in service. At the end of each year the Committee awards grants to local organizations serving youth.

### 2022 YPC Grants

Big Brothers Big Sisters of Butler County <i>Site based mentoring program at Riverview Elementary School</i>	\$5,000	Fitton Center for Creative Arts <i>Summer Camp</i>	\$5,000
Boys & Girls Club of Hamilton <i>STEAM Learning Activities</i>	\$1,000	Girls on the Run <i>Scholarships for local girls to participate</i>	\$2,500
Butler County Success Program <i>Healthy Home for Hamilton Kids Kits</i>	\$5,000	HOPEfull Pastures <i>Animal Agility Course</i>	\$5,000
CHIPs Workforce Alliance <i>Citywide Hamilton Internship Program</i>	\$5,000	PARACHUTE CASA <i>Gift card program for meal sharing</i>	\$1,500
		Support to Encourage Low-income Families <i>Neighbors Who Care Home Rehab Program</i>	\$3,000

Youth Philanthropy Committee grants are made possible by the Albert Stuhlmueeller Fund, Butler County Children’s Home Fund, Hamilton Exchange Club Fund, Charles & Elizabeth Heitsman Fund, Christopher S Courtney Memorial Children’s Fund and Melvin Jo & Mary Helen Hauser Memorial Fund..



### 2022 Youth Philanthropy Committee

Emma Bucheit, Brayden Eldridge, Case Trokhan, Ashley Waggoner, Sophia Williams, Annie Whalen, and Josie Halverson from Badin High School; Chloe Christen, Kendall Pfeiffer Lee, Briella Combs, and Natalie Yarger from Hamilton High School; Jillian Proctor, Ava Sanders, and Rylin Ciavarella from New Miami High School; Mia Jackson, Natalie Janssen, Laney Johnson, and Matthew Romans from Ross High School.



# 2022 Grants Further Missions, *Support Goals and Enhance Quality of Life*

Awarding grants to organizations who serve the local community remains a key focus of the Hamilton Community Foundation and its donors. Recognizing and tracking critical needs locally is what sets a community foundation apart from other foundations. Through grant applications, donor advised grants and occasional needs brought to the attention of the HCF team, support for local programs, services and initiatives is realized.

Whether organizations provide education, arts programming, mental health services or address food insecurity, the Hamilton Community Foundation utilizes fund dollars to meet local needs and subsequently the charitable goals of fund holders.

*Here are some examples of grant dollars at work.*



*2022 Grantee Has  
a Barn Raising*

When animals are at the center of your organization's mission it's important to have a sturdy and safe place for them to live. For H.O.P.E.-full Pastures, a renovated barn is making all the difference in the world for the work they do in the community.

H.O.P.E.-full Pastures creates a safe and nurturing environment for children and families who have suffered loss and/or have endured trauma. The use of animals in their programming ranges from animal care, to bonding with the animal, to building trust.

The barn at the property on Ross Hanover Road was in disrepair when the H.O.P.E.-full Pastures team submitted a grant. Through the Foundation, \$60,000 was awarded for the exterior restoration of the barn.

According to modern research the use of animals in therapeutic settings has proven benefits. For H.O.P.E.-full Pastures owner, Christa Carrero, no research was needed.

"I have personal experience from a young age of recognizing the healing that an animal can bring," says Christa. "I was bullied as a middle schooler and it was the time I spent

riding my horse that helped me cope the most."

H.O.P.E. – full Pastures, or the budding idea of it, began on the back of that horse for Christa. Today, she is witnessing the fruits of that dream daily on the farm and hearing regularly from the families being served.

"We didn't really know what to expect, but it was exactly what we needed," states one parent, "from start to finish we felt supported, listened to and genuinely cared for. We got to experience new life together and bond over baby goats and ducklings."

One young client made so much progress the school official who recommended the program commented "The eye contact blew me away. A total sign of healing and felt safety."

Sessions for young clients and mentoring sessions with families take place during the Spring, Summer and Fall seasons. Sessions include animal care, bonding, building trust, outdoor play, purposeful conversation, sensory/table toys, craft, snack and a curriculum promoting healing.

Not only do the animals use the new barn but because it has been re-sided and waterproofed the H.O.P.E. – full Pastures team is preparing the upper portion for programming.

"We actually have a team of professionals working on a detailed plan for the sensory gym that we are putting into the upper part of our barn," says team member JoAnna Sester.

The \$60,000 grant from the Hamilton Community Foundation wasn't the only support the organization received in 2022. They also received \$5,000 from the Youth Philanthropy Committee.

"We are so excited about all of the doors that have been opened because of these grants," says Christa. "Hamilton Community Foundation has quickened our dreams in helping us achieve our goals and more effectively reach the at-risk children in our community and beyond."



Abby Messner, Nancy Eigel-Miller and Jess Hartley

## 1N5 Normalizing Mental Health Conversations

For some, tragedy can stifle progress, and there are some who turn their pain into purpose. That is the case for the founder of 1N5, an organization that educates people about mental health issues like anxiety, depression, bipolar disorder and other matters that arise as a result of environmental and cultural stressors.

Nancy Eigel-Miller found herself immersed in the mental health realm when her husband died by suicide. But that's only part of her story. What she did after tragedy is where her story began again.

Armed with questions about signs and symptoms of mental anguish, Nancy sought answers for her own grief and then turned her new-found education into a full-fledged non-profit organization with a mission to support mental health awareness and education in the community. Hence, 1N5 was born.

The name 1N5 stems from the statistic that 1 in 5 people experience some form of mental illness. The

organization is not in the business of treatment, reducing stigma is where they focus their efforts.

"Our work centers around increasing awareness and normalizing conversations," says Nancy. "People aren't educated to know signs and symptoms of mental health illness because there is a stigma that prevents us from talking about it."

Nancy and her team work regularly in the schools, encouraging young people to speak up about their feelings of anxiety and depression. This is where the Hamilton Community Foundation met them on their journey.

"1N5 submitted a grant to help them work within some of the school systems in our service area," says John Guidugli, President and CEO of the Hamilton Community Foundation. "They are well known and reputable for being very good at what they do and the Board was unanimous in supporting them with a grant."

1N5 is currently in 125 schools in the Tri-State area, including Hamilton, Badin and Ross where they work to educate students about how to identify their own and others symptoms of mental stress. They also provide education to teachers and administration and conduct climate surveys where they identify the mental health culture of the school.

The 1N5 team is lean and mean, utilizing their dollars where they are most needed – educational materials, handouts, peer-to-peer programming, screenings for depression and suicide awareness. Their mission to prevent suicide by erasing the stigma of mental illness and promote optimal mental wellness is at the forefront of everything they do and in the hearts of every person on their team.

The Hamilton Community Foundation is proud to have supported their efforts in 2022.

## Inspiration Studios receives \$53,600 toward new van

The Hamilton Community Foundation helped Inspiration Studios purchase a third vehicle to transport their clients to and from the studio.



*Inspiration Studio clients with their new ride!*





# SCHOLARSHIPS

## *Set Students of all Ages on their Path*

Education is a major pillar of focus for the Hamilton Community Foundation. Not only does the Foundation pour into the futures of local graduates continuing their education through scholarships but the Foundation also supports education initiatives within the school system through free educational programming and through scholarships to the “non-traditional” student. Furthermore, the Foundation has scholarships specific to those who wish to increase their employability with technical degrees and certifications.

Scholarships for Adults Returning to College are geared toward the “non-traditional” student over the age of 25. These scholarships have perhaps the most potential to change lives as many of the recipients are upskilling and therefore are making themselves more employable in the workforce. They are changing the trajectory of their own future with the assistance of scholarships.

Veranique Sutton is an example of how it’s never too late to pursue your education and career dreams.



Veranique is a Social Work student at Miami University. She says the Hamilton Community Foundation Adult Scholarship was a life saver for her.

“I had children early and raised them to live the life I desired for myself. I was stuck in a dead end job that I hated and education was my only way out.”

Veranique is scheduled to graduate this year and looks forward to finding employment in her field.

“To the donors who make these scholarships possible, I say thank you from the bottom of my heart.”

*The 2022  
Scholarship Program  
awarded \$1,015,500 to  
261 students locally.*

Add this to our graduating seniors scholarships and upper classman scholarships and you can see how creating a scholarship fund can look a little different depending upon *your* charitable goals.

# BY THE NUMBERS

## Statement of Financial Position December, 2022 & 2021

(Unaudited Statement)



Assets	Hamilton CF	FairfieldCF	RossCF	TOTAL 2022	TOTAL 2021
Cash and cash equivalents	5,378,217.73	485,176.23	5,753.94	5,869,147.90	3,309,285.41
Prepaid assets	868.12	-	-	868.12	456.33
Investments	100,516,386.47	3,932,376.00	511,548.48	104,960,310.95	119,674,213.27
Property and equipment, net	3,353,197.44	910.98	-	3,354,108.42	3,567,266.76
Notes receivable	19,358,328.79	1,500.00	-	19,359,828.79	18,491,712.96
Discount on notes receivable	-	-	-	-	-
Other Assets	98,845.95	1,349.66	-	100,195.61	98,845.95
Reserve for Uncollectable A/R	(425,000.00)	-	-	(425,000.00)	(425,000.00)
CSV-Life Insurance Policies	381,979.95	-	-	381,979.95	377,120.16
Accrued Interest-Concord	916,070.76	-	-	916,070.76	886,070.76
<b>Total Assets</b>	<b>129,578,895.21</b>	<b>4,421,312.87</b>	<b>517,302.42</b>	<b>134,517,510.50</b>	<b>145,979,971.60</b>
<b>Liabilities and Net Assets</b>					
<b>Liabilities</b>					
Accounts payable	1,623,217.13	1,636.95	-	1,624,854.08	35,053.54
Grants payable	415,770.76	-	-	415,770.76	797,995.43
Note Payable US Bank	10,241,517.89	-	-	10,241,517.89	10,241,517.89
Renewable Scholarships payable	716,400.00	26,000.00	-	742,400.00	901,500.00
Renewable Scholarships long term	-	-	-	-	-
Accrued expenses	98,153.88	386.53	-	98,540.41	124,325.92
Agency Liability	1,844,760.85	-	-	1,844,760.85	1,711,754.82
<b>Total Liabilities</b>	<b>14,939,820.51</b>	<b>28,023.48</b>	<b>-</b>	<b>14,967,843.99</b>	<b>13,812,147.60</b>
<b>Net assets</b>					
Assets W/O Restrictions	27,800,818.31	511,458.38	753.94	28,313,030.63	33,002,216.19
Assets W/ Restrictions	86,838,256.39	3,881,831.01	516,548.48	91,236,635.88	99,165,607.81
<b>Total net assets</b>	<b>114,639,074.70</b>	<b>4,393,289.39</b>	<b>517,302.42</b>	<b>119,549,666.51</b>	<b>132,167,824.00</b>
<b>Total liabilities &amp; net assets</b>	<b>129,578,895.21</b>	<b>4,421,312.87</b>	<b>517,302.42</b>	<b>134,517,510.50</b>	<b>145,979,971.60</b>
<b>Contributions received</b>	<b>8,794,731.42</b>	<b>4,676,040.23</b>	<b>523,363.33</b>	<b>13,994,134.98</b>	<b>18,908,110.67</b>
<b>Grants disbursed and accrued</b>	<b>(6,604,978.27)</b>	<b>(241,585.39)</b>	<b>-</b>	<b>(6,846,563.66)</b>	<b>(4,987,548.63)</b>
<b>Investment income received</b>	<b>2,509,950.17</b>	<b>73,937.26</b>	<b>5,546.88</b>	<b>2,589,434.31</b>	<b>3,323,264.36</b>
<b>Market adjustment</b>					
<b>(+) gain or (-) loss</b>	<b>(20,952,389.82)</b>	<b>(36,836.51)</b>	<b>(10,964.90)</b>	<b>(21,000,191.23)</b>	<b>10,491,617.32</b>

(A) Net asset contribution transfer from Fairfield Community Foundation was \$4,458,119.49 at 7/1/2022.





## *Our Impact is Strengthened by Good Financial Practices*

The Hamilton Community Foundation finished 2022 strong, withstanding an unpredictable market. Completing the year with \$134,517,510.50 in assets is a testament to strong investment strategies and good, solid financial practices internally. The Investment Committee of the Hamilton Community Foundation guides the investment practices of the Foundation. The committee is comprised of local professionals in the investment industry.

*"There are three ways for the Foundation to increase its assets: new Funds, new contributions to existing Funds and positive investment returns. All three are critical to the work (mission) of the HCF. While new Funds and existing Funds continued to show growth, it was a challenging year for the investment returns component. However, the Investment Committee believes that we are well positioned to contribute to the growth of the Foundation's assets over the long term."*

*-Jack Whalen, Chair*



Jack Whalen, Chair

### **2022 Investment Committee**

Jack Whalen – Chair

William Groth

John Guidugli

Bill Hummel

John Kirsch

Thomas Koehler, Jr

Dustin McDulin

Thomas Vanderhorst, Jr



## *New Director of Finance Brings Non-profit Finance Experience*

**Crystal Reece** joined the Foundation in 2022 as the Director of Finance. Crystal has a B.S. and MBA in Accounting and brings with her non-profit experience in the financial realm. She is a results-oriented accountant specializing in innovative processes, streamlining reports and ad hoc reporting. She is proficient in a variety of accounting based programs and immersed herself in learning the Foundant Technologies Software System that the Foundation utilizes. Crystal has become the “go-to” team member for guidance with the system.

Crystal's attention to detail and commitment to her position helped the Foundation tremendously with onboarding the Fairfield and Ross Community Foundations into the HCF fold. She is already proving herself to be an invaluable member of the Hamilton Community Foundation team.



## 2022 Annual Meeting *Welcomes Affiliates*



HCF President and CEO John Guidugli opened the Annual Meeting with comments focusing on the Foundation's impact and the culture of community that makes that impact possible. John spoke about the 2022 Strategic Planning process which laid the framework for the Foundation's work for the next several years.



**Martha Mehl**



**Justin Krueger**

Guest speakers at the 2022 Annual Meeting included Ross Community Foundation Advisory Board Chair **Martha Mehl** and Fairfield Community Foundation Advisory Board Chair **Justin Krueger**. Each spoke of how they came to be affiliates of the Hamilton Community Foundation and their dedication to their communities.



**Award recipient Kathleen Klink with John Guidugli**

The David L Belew Legacy Award was presented to community volunteer **Kathleen Klink**. Kathy's passion for Hamilton and Hamilton neighborhoods is evident to everyone who knows her. The Hamilton Community Foundation is a grateful beneficiary of Kathy's true commitment to the community. She was presented with the Legacy Award for her many years of community service, volunteerism and the significant contribution of her "time, talent and treasure" to the benefit of the greater Hamilton Community.





*Established 1951*

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**Address correction requested**

## Harry T Wilks Educators of Excellence for 2022



**Wilks Honorees L to R:** Gabrielle Sims, Heather Adams, Mike Neri, Melissa Carmody, Sarah Martin, Karen Bultman, Kristy Bailey, Emily Balsbaugh, Zac Mills, Amy Soldner, Michelle Beck, Cara Kerchner, Krisstina Monnig, Michelle St. Laurent, Melissa Moser, Tracy Francis **Not pictured:** Becky Huber, Wendy Tuttle, Paul Zimmerman