



Hamilton
community foundation

GIFT of OVER \$300,000

supports young men through YWCA

When you mention the YWCA you don't often think they serve the men in our community. However, the YWCA of Hamilton is doing just that. They realize men also are victims of domestic violence and are providing services to support them. They also are working to combat domestic violence by providing support to young men while they are in high school. With the support of a donor at the Hamilton Community Foundation they piloted a program called Men of Honor.

Men of Honor is a strengths-based group model developed by One



Circle Foundation that empowers young men to find belonging, build assets and de-construct harmful masculinity beliefs on their journey toward becoming respectful leaders and connected allies in their communities. During the pilot year, seven groups were offered at Hamilton High and Fairfield High school. A total 62 young men went through the 19 week program and more were interested in participating.

"I had the privilege of facilitating the program and heard many stories of hardship and struggle of young men who are determined not to be owned by their circumstances overcome and excel," commented Aaron Simpson, volunteer Men of Honor facilitator. "I was thankful for the opportunity to be a constant for young men who are so well acquainted with turbulence while offering a listening ear, words of wisdom and encouragement."

Due to the success of the pilot program, the donor, who has chosen to remain anonymous, made a five year commitment to support the program so it can expand and continue to serve the needs of our young men.

PATHWAYS to Giving

Donor advised funds allow donors to address needs of the community

When a donor establishes their donor advised fund at the Hamilton Community Foundation they get the benefit of the Foundation's knowledge of community needs. When an anonymous donor started their fund they had ideas of what needs they wanted to support but not the organizations. Through discussion and research, the Foundation was able to connect them with several organizations that met their goals.

One organization was the YWCA of Hamilton. The donor was interested in supporting organizations that shelter fathers and children in need of safety from domestic violence, as well as outreach and education about domestic violence to young men. While the YWCA didn't have a program in place to reach out to young men, they knew this type of service was a great need. They were thrilled to have the funding and opportunity to address this need.

"This gift is a game changer for our organization. To have this opportunity to focus on combating domestic violence early by educating young men is humbling," said Wendy Waters Connell, Executive Director YWCA. "This generous gift enables us to impact the lives of more young men today and in the future."

Through the creation of the Men of Honor program and its success, the YWCA was thinking "outside the box" to not only work with the Foundation to address the charitable wishes of the donor, but also the needs of the community.

If you want to learn more about how you can establish a donor advised fund at the Hamilton Community Foundation, call or visit our website —hamiltonfoundation.org

GIVING FROM COMMUNITY GRANT FUNDS

november 2019

Hamilton High School Band - Sponsor a Sousa Program



Over the past nine years, the Hamilton High School Marching Band Program has more than doubled in size. With the band program growing by leaps and bounds, it has become difficult to provide the instruments and equipment needed,

especially more expensive instruments like the sousaphone or marching tuba. Many of the current sousaphones owned by the Hamilton City School District are more than 20 years old and deemed beyond repair. The Hamilton High School Band Parents organization set out to remedy this situation by launching a "Sponsor a Sousa" program seeking support from the Hamilton community to purchase new sousaphones for the Marching Band.

"We are grateful that the Hamilton Community Foundation responded to the call for support and granted nearly \$30,000 for four sousaphones," said John Millard, President Hamilton High School Band Parents. "Based on our past experience, when performers are provided with quality instruments, the seriousness and performance quality among players also increased."

YEAR-END GIVING: *Ways to Maximize Your Charitable Deduction*

Have you given any thought to your year-end charitable gifts yet? Now is a great time for giving. When you're making a difference in our community. Here are ways to make the most of your year-end giving.

Bundling Donations

With the recent increase in the standard deduction, many donors are using advised funds to "bundle" charitable gifts for several years into one calendar year. This strategy allows you to exceed the standard deduction in one tax year, while using an advised fund to support your favorite charitable causes over several years.

Review your stocks.

If you'd like to make a year-end charitable gift, consider giving appreciated stock. Selling stock will incur capital gains on the appreciation, but if you gift stock, you will receive a charitable deduction for the current market value of the stock—just as you would with a cash gift. Such gifts are deductible up to 30% of your adjusted gross income and you can carry the deduction forward for up to an additional five years.

Add to Your Fund

If you already hold a fund with us, you may make additional gifts at any time. Contact us as soon as possible to learn how you can gift cash, stock, publicly-traded securities, IRA assets and even complex transactions like real estate.

Honor a Loved One

A meaningful way to show the community that you care during the holidays is to honor a friend or family member by supporting a cause that they held close to their heart. At the Foundation, many nonprofit organizations have established endowed funds to secure their future operations.

Giving to our schools – Partnering to remove barriers to educational success

Create a Better Educated Community is one of the strategic goals of the Hamilton Community Foundation. The Butler County Educational Service Center and the Hamilton City Schools have partnered with us to ensure educational success. Identifying barriers to learning is something our school partners are addressing through the Butler County Success Liaisons. Success Liaisons, now in all Hamilton schools, work to remove non-cognitive barriers to learning. The Foundation's Unrestricted Fund provides annual support to employ a Success Liaison in the Hamilton City School District.

Recently a gift of \$5,000 was granted from the Hamilton Community Foundation's Youth Philanthropy Committee to help provide personal care items. Many families are living in extreme poverty, and they depend on government-issued help for their weekly groceries. Government assistance cannot be used to purchase non-food essentials, such as personal care products and paper products. Families struggle to provide necessities, such as soap, shampoo, deodorant, toothpaste, laundry detergent and/or toilet paper. Consequently, many youth do not have access to these items.

The grant from the Youth Philanthropy Committee purchased these much-needed items for youth in the Hamilton City School District. The liaisons assembled summer care bags, containing these items, and delivered them to families. "Personal cleanliness and self-esteem go hand-in-hand. Our hope is to enhance the self-esteem of the youth by providing them with the tools needed to keep themselves clean and healthy," said Carie Wynn Success Program Supervisor. "We are thankful for the support from the Hamilton Community Foundation and Youth Philanthropy Committee."



Youth Philanthropy Committee

When you make a donation by December 31 to the Hamilton Community Foundation, you aren't just giving money—

Give now—decide later.

If you are planning for a charitable tax deduction this year but are undecided about which nonprofits to support, consider opening a donor-advised fund at the Hamilton Community Foundation. You can claim a deduction for contributions to your fund now even though distributions from the fund might be made in future years. A donor-advised fund can be set up in one meeting.

IRA Rollover

If you are age 70 ½ or older, you can gift up to \$100,000 per year directly from your IRA to the Hamilton Community Foundation to support or create a new scholarship fund, field of interest fund or a charitable organization endowment fund. By using your pre-tax IRA assets, your charitable gift costs you less. In

addition, IRA Rollover gifts can be used to meet your required minimum distribution and are not subject to income taxes.

Let the Hamilton Community Foundation do the legwork.

Working with the Hamilton Community Foundation gives you access to our extensive knowledge of the local nonprofit community and the broad charitable needs of our region—so you can stay informed about the organizations you support and the effect your giving will have on the future of our community.

Before making any significant gift to charity, consult with your CPA, attorney or other advisor to understand the impact on your taxes and estate.



Annual Meeting – Celebrating nearly 70 years of making a difference

It was a beautiful evening in September in German Village as we celebrated the work of the Foundation with friends during our annual meeting. The evening included presentations from Talent Attraction Program Scholarship recipient, Joshua Chaney and RiversEdge Concert Series Director, Adam Helms. They shared their appreciation for the support of the Foundation as they make a difference in the community. The evening also honored Karen and Jack Whalen with the David L. Belew Legacy Award and included the sounds of the Faux Frenchman and smells of wonderful food provided by Tano's Bistro.



This year, the David L. Belew Legacy Award was given to Karen and Jack Whalen for their numerous contributions to the community and the Hamilton Community Foundation.

Karen was born and raised in Hamilton and after a career in county government, she worked

for several nonprofit agencies in the Greater Hamilton area include the Foundation. Through the years Karen has played a key role in founding many important programs and initiatives including Heritage Hall Museum, the Butler County History Collaborative, and The Women's Fund at the Hamilton Community Foundation. Karen is passionate about historic preservation and serves as past president and active board member of Historic Hamilton, an active member of Architectural Design Review Board, and the Michael J. Colligan Fund of the Hamilton Community Foundation.

Jack, originally from Rochester New York, had a successful 42 year career in financial services, retiring as Manager of the Cincinnati office of Morgan Stanley. Jack has a long history of service to the community and the Community Foundation. He has taken a leadership role in a number of community organizations and projects. Jack served on the Foundation Board from 1985-1993 and was Board President in 1992 and 1993. Jack is currently a member of the Development Committee and serves as chair of the Investment Committee, a role he has held for many, many years.

This award is given annually by the Hamilton Community Foundation to an individual or family to recognize significant contributions of time, talent, and/or treasure for the benefit of the greater Hamilton community and the Hamilton Community Foundation. It was our honor this year to present Karen and Jack Whalen the David L. Belew Legacy Award.



HARRY T. WILKS HAMILTON CELEBRATES EDUCATION EVENT

For 17 years, the Harry T. Wilks Hamilton Celebrates Education Event has been recognizing outstanding educators in Hamilton public and private schools. This year seventeen educators were recognized at the event and awarded a \$1,000 grant to be used in their classroom or school. Additionally, each educator received an individually designed picture frame from InsideOut Studios. The piece included a photo and bio of the artist who created it. Through this program, Harry Wilks' legacy of supporting and recognizing educators lives on. Congratulations to all educators and thank you for all you do for our youth!

The 2019 "Hamilton Celebrates Education" Educators of Excellence:

- Judy Armstrong, English teacher at Wilson Middle School
- Melissa Biddinger, 5th grade teacher at St. Joseph Consolidated Elementary School
- Kathleen Gibboney, 5th and 6th grade teacher at St. Peter in Chains School
- Andrea Groh, Math teacher at the Hamilton High School - Freshman Campus
- Lori Harrison, 7th and 8th grade teacher at Garfield Middle School
- Lynnette Jackson, 3rd grade teacher at Brookwood Elementary
- Kaitlynn Kerley, 5th grade Language Arts and Social Studies teachers at Riverview Elementary
- Christina Dennin Mapes, 1st grade teacher at Ridgeway Elementary
- Melissa McElroy, Preschool teacher at St. Ann School
- Taylor Provins, Literacy coach at Highland Elementary
- Jackie Quispe, ESL teacher at Fairwood Elementary
- Abby Scott, 3rd grade teacher at Bridgeport Elementary
- Michelle St. Laurent, 3rd grade teacher at Crawford Woods Elementary
- Michael Sunderhaus, Social Studies teacher at Hamilton High School - Main Campus
- Bill Valerius, Director of Academic Support at Stephen T. Badin High School
- Megan Vogel, 3rd and 4th grade math and science teacher at Immanuel Lutheran School
- Theresa Young, Music teacher at Linden Elementary

Students Entertain Educators



Hamilton High students, Andrew Roden and Kyle Boling



Hamilton High student, Skylar Crooke



Hamilton High student, Andrew Brown



Badin High student, Bella Yang



WOMEN GIVING THROUGH THE WOMEN'S FUND

November 2019

For more than twenty years, the Women's Fund has brought women together to raise funds from women to benefit women. Through the Women's fund, women at every economic level can be givers and make philanthropy a tool for change. "By pulling our funds together, we are making a difference and are excited that we have now granted more than \$200,000 and have more than 400 individuals donating to the fund," said Joan Witt, Women's Fund chair.

In 2019, the Women's Fund granted more than \$50,000 to several organizations. One recipient was Miami University E-Campus STEAM Studio. The grant provided scholarships to female campers to increase access to STEAM learning opportunities and exposure to the Miami University Regionals Hamilton campus.

"Through the funding from the Hamilton Community Foundation Women's Fund, we were able to reach out to young women in Hamilton and the surrounding areas and double, and sometimes triple, the enrollment of young women for our programs," said Carrie Chambers Coordinator of E-Campus Student Engagement.

The Robot Academy registration originally had four young women registered prior to the scholarship, but because of the scholarship, eight additional young women joined us for that week's program.

"The funding received from the Hamilton Community Foundation Women's Fund was a gift that will continue to impact the lives of its recipients. This generosity provided an opportunity to many girls, such as Briella, who was able to participate in STEAM Studio solely due to receiving the scholarship. The opportunities allowed her to not only explore her passion for science and art at the same time but pushed her outside of her comfort zone," commented Carrie. In the words of Briella's mother, "her experience helped instill in her a sense of social confidence as she prepares to begin middle school."



Another recipient, Girls on the Run, received a \$5000 grant to support the program throughout the Hamilton City School districts.

"In the 5 years we have had the GOTR program at Brookwood Elementary we have seen the current and former participants become a family within the school. The girls grow together through laughter, open conversations, and working together as a team. GOTR is such a powerful program to help give our girls the tools to help them be successful as they continue their path through Hamilton City Schools and into their own life journeys. The grant money will ensure that our GOTR family will continue to grow!"

- Girls on the Run Coach

"Girls on the Run helps me learn about friendships. Also, I like running and getting stronger so I can be ready for the 5K. You get to make lots of friends on the team; it is good to have more friends to help you through your day."

- Girls on the Run Participant

Giving to the Women's fund allows even the smallest gift to make a difference. By combining the funds, women are able to impact the lives of so many in a bigger way.

Visit hamiltonfoundation.org to see complete list of grants awarded in 2019.

Starting your own charitable fund

You are passionate about our community— and we are too. Whether you want to organize and focus your giving, support a specific cause, work together to help make the Hamilton Community thrive for future generations, provide scholarships for students, or roll up your sleeves and get involved, we are here to help. We offer many different options for your giving, provide expertise about the needs and challenges in our community, and are committed to strong financial management.

As you think about your charitable fund, consider if you want to:

- Meet future challenges and opportunities through your estate
- Designate an area of focus
- Designate specific charities
- Support education
- Stabilize a nonprofit's future through an endowment
- Rely on the Community Foundation's giving expertise



You can start a fund for as little as \$5,000; \$10,000 for a scholarship fund. It's as simple as contacting us to discuss your charitable interests – creating a fund agreement that outlines your wishes and funding it with the best gift source for you.

Whatever your charitable interest, the Hamilton Community Foundation can assist you to meet your charitable goals.

FOUNDATION ASSETS GROW THROUGH THOUGHTFUL INVESTMENT



One of the objectives in the Foundation's strategic plan is to Increase Assets to Increase Impact. Increasing assets can come through garnering charitable contributions from donors throughout the community. But another important way to grow the assets of the Foundation is through the prudent investments of our funds. The Foundation's Investment Committee is charged with the responsibility of working to ensure that the Foundation's investments produce returns at the highest level possible.

HCF's Investment Committee is chaired by Jack Whalen, former manager of the Cincinnati office of Morgan Stanley. Jack's extensive knowledge and experience are invaluable as he chairs this group of dedicated volunteers including Bill Groth, Tom Koehler, John Kirsch, Bret Parrish, Rob Wile and

Tom Vanderhorst. Dustin McDulin recently joined this group of dedicated individuals who are constantly striving to ensure the appropriate growth is realized from the Foundation's investments.

In addition to the volunteer support, the Foundation is assisted by the team at FEG, our investment consultants. FEG is a Cincinnati based firm with clients across the country. They serve a broad range of clients, but focus on non-profit institutions, with that sector representing over 85% of their industrial client base.

The volunteer Investment Committee works very closely with the Investment Consultants to ensure that the funds invested at the Foundation are properly managed to offer the best opportunity for the best possible returns.

"The Foundation benefits greatly from the expertise and wisdom of the Investment Committee. The Committee is so knowledgeable and works so well with the information provided by FEG. The community should know that the Foundation's investments are prudently and professionally managed", stated Foundation President and CEO John Guidugli.

The Foundation is grateful for the dedication and hard work of the members of the Investment Committee. The positive returns we earn on our investments translate into charitable dollars being returned to the community in the form of grants to deserving non-profits and important causes.



319 N. Third Street
 Hamilton, OH 45011
 513.863.1717
 hamiltonfoundation.org



Excellence. Accountability. Impact.™

Address correction requested

UP & COMING

Mark Your Calendar

German Village Christmas Walk

Start your Holiday tradition by attending the German Village Christmas Walk on **Sunday, December 1st – noon to 5pm.** Step back in time and get into the spirit of Christmas past with food, music, carriage rides and carolers. Many doors of German Village will be open for this unique Christmas event. Come and experience this fun, free family event.



Holiday Hours

The Hamilton Community Foundation is here for all of your year-end giving needs and questions. Contact us at 513-863-1717. We welcome your calls and visits.

Our offices will be closed:

- Thursday, November 28, 2019**
- Friday, November 29, 2019**
- Wednesday, December 25, 2019**
- Wednesday, January 1, 2020**

Scholarships Available for Area Students

As the school year gains momentum, parents and students can turn to the Hamilton Community Foundation as a resource for area scholarships. We will begin accepting applications for graduating high school seniors **December 20th – January 20th.** Please visit the foundation's website for further information. www.hamiltonfoundation.org

FOUNDATION MISSION STATEMENT

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

FOUNDATION VISION STATEMENT

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