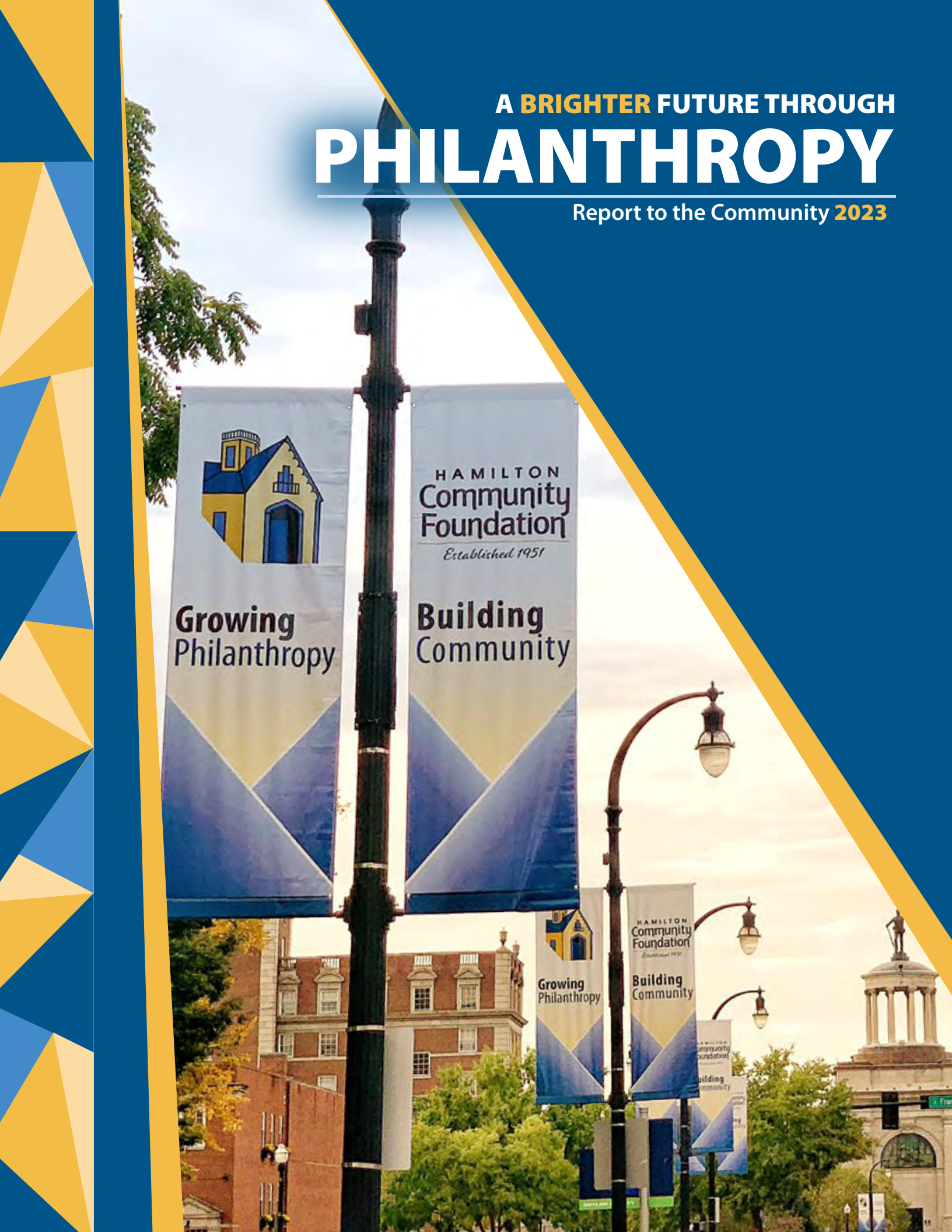


A BRIGHTER FUTURE THROUGH PHILANTHROPY

Report to the Community 2023





Foundation Staff

Kasey Rouse
Scholarship Program
Manager

Jacob Stone-Welch
Director of Donor
Services

Crystal Reece
Director of Finance

John Guidugli
President/CEO

Katie Braswell
Vice President

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Attorney, Parrish, Marcum & Trokhan, Co., LPA

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Retired, Miami University

Jason Crank, Secretary
Partner, United Health Insurance Companies

Andrew Schuster, Treasurer
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Lecturer, Miami University
Director of Youth, Community Organizing & Engagement,
YWCA Hamilton

Catherine Evans
Attorney/Director, Millikin & Fitton Law Firm

Vaden "Woody" Fitton
Retired, Great Miami Valley YMCA

Scott Kruger
Attorney, Kruger & Hodges Attorneys at Law

Helen "Niki" Motley
Community Volunteer

Susan Vaughn
Retired, Miami University

Mitchell Vocke
Chief Lending Officer, Telhio Credit Union

David L. Belew - Trustee Emeritus
Retired President, Beckett Paper Company

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

AT A GLANCE

TOTAL GIFTS RECEIVED

\$10 Million

NEW FUNDS IN 2023

52

NUMBER OF ORGANIZATIONS SUPPORTED

488

NUMBER OF STUDENTS SUPPORTED

358

TOTAL ACTIVE FUNDS

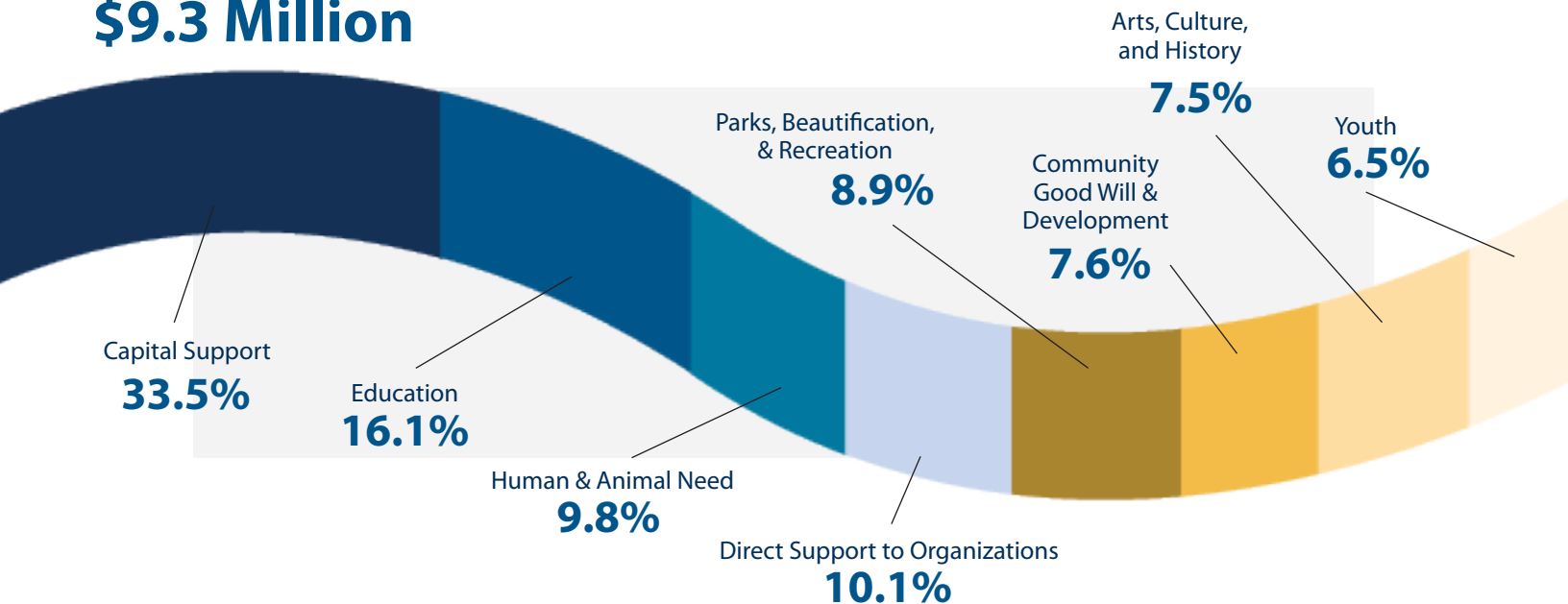
849

TOTAL GRANTS AWARDED SINCE 1951

\$162.8 Million

GRANTS AWARDED IN 2023

\$9.3 Million





A LETTER FROM THE
PRESIDENT
and BOARD CHAIR

Dear Friends,

The Hamilton Community Foundation is extremely grateful for the ongoing support our organization has received over the last seven decades. What began on a frosty Christmas Eve in 1951, as a mission to secure funding for our community's foremost needs has lived on and grown into a successful organization, providing opportunities and financial assistance to those members of Hamilton who need it most. The founders of the Hamilton Community Foundation envisioned an organization that would spur our community forward, meeting all the challenges it would face. However, we do not know if even they could have foreseen the outpouring of support and sustainable success we have achieved.

Hamilton is a wonderful community, full of creativity, determination, and passion, and it is with great pride that we can say the Hamilton Community Foundation

supports endeavors that encourage these principles. That is because of you and your contributions.

2023 was the first full year of our partnerships with the Ross Community Foundation and the Fairfield Community Foundation. These organizations continue to grow and contribute to the strength and impact of the foundation. We are grateful for all that they add to the mosaic that is our community. As you read this report, we encourage you to reflect not solely on the dollars and cents, but also on the legacy of hope that your contributions created. Our goal is to make our communities a place where everyone can thrive as they build a quality life for themselves and their families.

Together we helped make that goal a reality last year, just as we have throughout our organization's history. It has been said that the best time to plant a

tree was twenty years ago, and the second-best time is today. You, our friends, have proven this true time and time again. We have come so far in the last seventy years. What we accomplish in the next seventy years will be even greater.

From the bottom of our hearts, we thank you for your enduring support. We are humbled by your generosity and your investment in the future.


Sincerely,



John Guidugli
President/CEO

Cynamon Trokhan
Board Chair



A tall, dark, rectangular sign stands on a grassy hillside. The word "HAMILTON" is written vertically on the sign in white, serif, all-caps letters. The sign is illuminated from within, making the letters glow. The background shows a sunset sky with orange and pink hues, and a road with streetlights and a car's headlights in the distance. The overall scene is a mix of natural and urban elements.

HAMILTON

NEW
FUNDS



Albert L. and Shirley M. Roy Fund
Albert W. and Jane B. Miller Legacy Fund
Bennyce Hamilton Scholarship
Chrisholm Farmstead Field Trip Fund
Christian's Corn Stand Jam Memorial Scholarship
Corn Stand Jam Mental Health Fund
Daniel Monnin Police Academy Fund
Darrell & Lenora Payne Family Charitable Trust
Dean Kees Advised Fund
Dean Kees Scholarship Fund
Doris Bergen Miami University Fund
Dorothy Lynch Memorial Scholarship
Dr. John Long Memorial Unrestricted Fund
Fairfield Firefighter Book Brigade
Fairfield Township Fire Dept. - Equipment Fund
First Financial Bank Fund
Fitton Family Trade Scholarship
Fur Fund-Leadership Fairfield 2023
Grace Changes Things Foundation Fund
Gretl Hauenstein Memorial Scholarship
HAAA Special Projects Fund
Hamilton Promise + A1
Hamilton Classroom Teachers Association Scholarship
HIGHER Fund
Hopefull Pastures Barn Fund
Huffman Park Project Fund
HUGS F2S with Local Schools
HUGS General Fund
Jeff Clark Memorial Scholarship
Katherine Schindler Memorial Advised Fund
Koenig Daggs Advised Fund
Lauren Kristine Welsh Memorial Scholarship
Leadership Hamilton Class 31 Fund
Linda and Paul DiBenedetto Scholarship Fund
Luke's Frosting the Future Fund
Mallory and Otto Family Fund
Matandy Steel and Metal Products Community Fund
Megan Filipek Memorial Scholarship
Mitch and Lois Rhodus Advised Fund
Molson Coors Endowed Scholarship
Morgan Township Community Park Fund
Ross Community Foundation Scholarship Fund
ServPro of West Hamilton Community Fund
Teddy Kremer Scholarship Fund
Thomas Hann Memorial Scholarship Fund
Tom and Melissa Dierking Family Advised Fund
Tom Wagner Memorial Scholarship Fund
Tonya S. Engel Memorial Playground Fund

Thanksgiving Feast

For Hamilton Families



Special Funds Project Delivers Food on Thanksgiving

On Thanksgiving 2023 local non-profits received a huge boost from the Hamilton Amusement & Hospitality Association (HAHA) in the form of over 100 Thanksgiving dinner packages. The HAHA team played a crucial role in delivering fresh Thanksgiving meals to locations, supporting over 700 individuals in total.

The project, appropriately dubbed Hamilturkey, was a huge success as families all over Southwest Ohio enjoyed meal kits delivered by the group on Thanksgiving Day. These kits included pumpkin pie, turkey, stuffing, gravy, non-perishable goods, a gift card, and more. The Hamilturkey project was made possible thanks to the creation of the HAHA Special Project Fund.

This new fund at the foundation allows HAHA to accept donations for its charitable projects in our community. It cost \$75 for donors to support a family of four, or they could donate food directly. Some meals were designed as sponsor kits where food was assembled and then picked up by families. For larger families, Inspiration

Studios lent their buses, which allowed the HAHA team to deliver freshly cooked meals directly to the doorstep of families in need. "It's just a supportive city, and this is just providing small businesses a chance to give back," said Tyler McCleary, co-founder of HAHA via the Journal News. "We're all pretty fortunate to be in the spot where we are, because any one of us could be close to being in that situation. It wouldn't take much. It's not easy to run a small business or a restaurant by any means."

In addition to delivering meals to families in need, HAHA also funded hot buffets on the Monday and Wednesday before Thanksgiving at the Central YMCA and Boys and Girls Club. Each location fed over 100 people each.



Tonya Engel Memorial Playground:

A Place Where Kids of **All Abilities** Can Play Together

People all over Morgan Township were delighted to learn of the Tonya Engel Memorial Playground when it was announced last year. Made possible through the Hamilton Community Foundation (HCF), the Tonya Engel Memorial Playground fund created more than just a place for kids of all abilities to play, it supported the equity of disabled Americans everywhere.

The new playground, designed by Mike and Kaylin Engel, will create a culture of tolerance and equality for the next generation of Morgan Township residents. The park's unique features will make it possible for kids of all ability levels to play together and form lifelong friendships. Reflecting on the contribution, the Engel family said in a joint statement, "Mom loved kids and nothing brought her more joy than seeing them happy. We know this park would be something that she would want and is our way of remembering and honoring her



spirit." For Kaylin, creating this space was about more than just honoring her mother-in-law, it was about telling the mothers of Morgan Township that they are cared for and the unique needs of their children are valued. This included her friend Sandra Tyler, the chair of Morgan Township's Park Advisory Board, who has a son with special needs.

"It doesn't matter what your abilities are," said Tyler. "It's about feeling welcome and encouraged to do whatever you can and live your best life."

Tyler's son and Engel's daughter have a close friendship, in part because they have a space where they can play together. The hope of building this inclusive playground is that more children of differing abilities will form strong bonds. The park will be fenced in and will feature wheelchair and stroller-friendly turf, a cozy dome for children who may be overwhelmed, a sensory tunnel, a communication board, and more. This was all made possible by Mike and Kaylin Engel who worked with the Community Foundation to facilitate this gift. The playground's construction is expected in 2024.

"It doesn't matter what your abilities are. It's about feeling welcome and encouraged to do whatever you can and live your best life."

- Sandra Tyler
Morgan Township's Park Advisory Board Chair





**ROSS COMMUNITY
FOUNDATION**
Affiliate of the
Hamilton Community
Foundation

A Year of... **FIRSTS**

It has been a year of firsts for the Ross Community Foundation. They awarded their first community grant, received their first legacy gift, and named a new member to their board of directors. After launching in 2022 as an affiliate organization of the Hamilton Community Foundation, their first full year has been nothing but success. Let's look at a few of their most prominent achievements in 2023.

Bernice Huff Roop

Treasured Ross Resident Gives Back to the Community with Legacy Grant

Bernice moved to Ross for the first time when she was six years old, and after briefly moving away, her family returned when she was a freshman in high school. She has been a Ross resident ever since. In that time, she led a storied life.

After raising their children together and twenty-five years of marriage, her husband tragically passed away. Bernice would go on to remarry and start a new career as a lab technician at P&G. From her time and experience there, Bernice has the distinct honor of holding a patent from P&G with only her name attached.

After she and her second husband retired, their investment advisor encouraged them to start a charitable trust. Bernice chose to leave a portion of the trust to the

Ross Community Foundation (RCF) so that she could contribute to the community she loves so dearly even after she passes.

"Giving back to the community was important to both of us," Bernice says of her and her husband. "I've always been thankful for what I have and this way whatever remained of the Trust after my passing would go to charities we had chosen."

The RCF is immensely grateful to Bernice for her choice to entrust the Foundation with her legacy gift, as of the many ways people can choose to give, a legacy gift is the most impactful.

Those who choose to leave a legacy gift know that by doing so they will continue to contribute to a community they treasure long after they leave this world. On behalf of the RCF and the Ross community, thank you, Bernice, for your generosity and your embodiment of the Ross spirit!



First Ross Community Foundation Grants

In 2022, a group of dedicated Ross residents set a goal of raising \$500,000 in a six-month timeframe to create the Ross Community Foundation. As of 2023, thanks to the support of 38 founding families and businesses, the newly founded Ross Community Foundation gave back through its first year of grants totaling over \$26,000. Arts, hunger, education, and human needs were the focus of the first approved grants and nine separate organizations were the beneficiaries of these funds. Including Ross local schools, Ross and Morgan Ministries (RAMM), the Ross Township Historical Society, Butler Philharmonic, and many more.



Advisory Board

Martha Mehl, Chair
Community Volunteer

Dana Mehl, Secretary
Community Volunteer

Wendy Fetters, Vice Chair
Kendal at Home Regional Advisor

Joe Conrad
Joe Conrad Insurance Company

Laura Hiler, CPA, Treasurer
Hiler Company Ltd.

Lisa Bosse
Fifth Third Bank



**FAIRFIELD
COMMUNITY
FOUNDATION**
CITY • TOWNSHIP Affiliate of the Hamilton
Community Foundation



Honoring Fairfield Veterans with a Memorial

For years, Fairfield Township veteran John Carboy had a dream. He wanted to build a memorial honoring veterans that would serve as a reminder of their legacy and the sacrifices they made for their community. Years in the making, Carboy, Veterans Committee member Dr. Fred Valerius, and Township Trustee John McGinnis were instrumental in making this vision come to fruition. Carboy passed away in 2019, but today his dream is a reality as the Veterans Memorial stands proudly at Heroes Park on Millikin Road.

“John was a source of inspiration for the entire Committee,” said Valerius. “But we had to buckle down and complete the design with Jim Smith, of Art in Stone Monument Company, and the fundraising and eventually oversee the construction and installation of the Memorial at Heroes Park.” A collaborative effort between the Veterans Committee, Fairfield Township Administration and Township Trustees, the Fairfield Community Foundation, and the many donors who made the project possible, the Veterans Memorial stands as a testament of gratitude to the veterans of Fairfield.

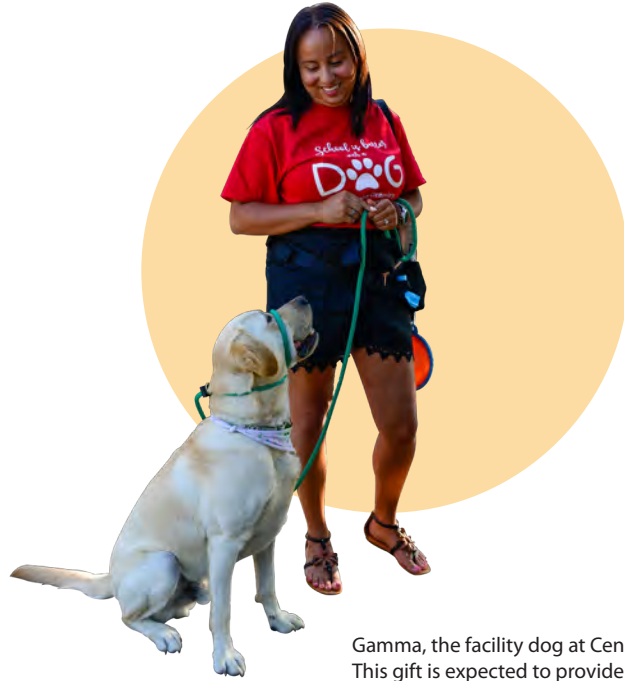


Major Gift Provides Facility Dogs in Local Schools

Fairfield school children are going to benefit from the comfort of Facility Dogs thanks to the support of the Fairfield Community Foundation's Community Grant Fund. The \$50,000 grant is the first given by the Fairfield Community Foundation in 2023, and the proceeds will go to training, both the dogs and school staff, and placement at Fairfield schools.

One dog, Warren, is already working at Fairfield South Elementary. Andrea Goins, a Guidance Counselor at Fairfield South Elementary and handler to Warren said, "Warren's unwavering affirmation and acceptance have significantly improved the mood and behavior of our students, promoting a conducive learning environment."

Warren's presence has resulted in a 50% reduction in behavioral issues at the school, illustrating the significant impact of these four-legged companions. Each facility dog costs approximately \$10,000 for initial placement.



Gamma, the facility dog at Central Elementary. This gift is expected to provide facility dogs at all the following schools: Central, South, Compass, North, East, Crossroads

Fairfield Firefighters Light a Burning Passion for Reading

This photo captures our brave firefighters sharing the magic of reading with the students at the Fairfield School District.

This program, supported by a grant from the Fairfield Community Foundation aims to enrich children's lives by bringing books into their classrooms. It's more than just reading, it's about inspiring young minds, fostering a love for learning, and building community connections with our local first responders.



Advisory Board

Justin Krueger, FACHE, Chair
President, Mercy Health Fairfield & North Market

Ronda Croucher, Vice Chair
Community Advocate

Phoebe Kerby, Secretary
VP of Branch Administration,
Lebanon Citizens National Bank

Cynthia Koenig-Daggs
Retired, Executive Director,
Great Miami Valley YMCA

Kim Hauer
Human Resources Director,
Fairfield City Schools

Doug Robertson
Director of Research,
Clippard Instruments

Lou Silverberg
Owner, Omni Printing
& Promotions

Krystal Tipton
Miami University /
University Advancement

Lonely No More:

Entrepreneurs in Hamilton Thrive with the **Lonely Entrepreneur Program**

Due in part to contributions from the Hamilton Community Foundation (HCF), the Hamilton chapter of the Lonely Entrepreneur (TLE) thrived in 2023. TLE is an organization designed to give back to small businesses and entrepreneurs who have the ambition and drive for success but lack the resources and mentorship. In the past year alone, it has helped over fifty small businesses and entrepreneurs discover a brighter future right here in Hamilton.

There is no one more grateful for the monumental support The Lonely Entrepreneur provides than Angela Jarrett. Jarrett, a Hamilton local, founded Ladies and Pearls Collection, a small business that sells handmade items like candles and African jewelry. She was excited to share with us the effect TLE had on her business.

TLE helped Angela create a long-term strategy so that Ladies and Pearls Collection can grow and thrive for years to come. What she called gold nuggets of information helped her learn to strategize, network, and collaborate with other small businesses in the community.

“Right now, we have candles and jewelry,” Angela said regarding Ladies and Pearls Collection. “I plan on expanding to add some other items soon. I have room to broaden my business, some wiggle room to add other things, and not just be a candle company.”

One of Angela’s favorite features of TLE is the Friday group calls where business owners from all over Hamilton get together to discuss the issues they are facing. The group then discusses solutions they could try to overcome those issues. It is a collaborative process that

draws the community together and gets them working as a team. It also allows businesses to learn from one another’s missteps and triumphs.

“The Lonely Entrepreneur is all about how to position your business for success.” Angela continued. “It’s very informational. It helps you shape things for your business, create contacts, and answer all the different questions you have. It gives you a lot of guidance and information.”

Outside of group discussions and mentorship sessions with other local business leaders, TLE’s website hosts hundreds of learning modules containing information that ranges from the basics of setting up an LLC to advanced knowledge that would be taught in a master’s seminar.

Thanks to HCF’s contribution, TLE was able to help more Hamilton businesses this year than ever before. Next year will be even greater!

“It’s like a blueprint for running your business. It helps you scale your business, it helps you with your business plan.”

Angela Jarrett
Owner of Ladies and Pearls Collection
& TLE Member



Cincinnati ToolBank Grant Builds Up Community Toolchest

Cincinnati ToolBank is a non-profit that provides year-round access to tools and essential event supplies for fellow non-profit organizations. The foundation awarded them a \$15,000 grant to expand services to the City of Hamilton and Butler County. The grant offsets membership fees for new members and provides funding for the purchase of new tools. It also supports direct outreach to our communities to create a large user base without the obstacle of new member fees.

An Improved After-School Program for the Boys and Girls Club Hamilton

The Boys and Girls Club of Hamilton provides teens and youths with the resources they need to have academic and social success. The Hamilton Community Foundation awarded a \$140,000 grant to expand after-school programming. This grant supported the addition of staff and supplies, to double attendance of the onside programming at Highland Elementary School and increasing participation in the Alpha Omega Teen Club hosted at their Grand Boulevard location.

Organizations Receiving Community Grants in 2023

HAMILTON COMMUNITY FOUNDATION

1N5
 4 The Community by the Community
 Animal Friends Humane Society
 Antique and Classic Car Club of Butler County
 Big Brothers Big Sisters of Butler County
 Boys & Girls Club of Hamilton
 Butler County Educational Service Center
 Butler County Historical Society
 Butler Philharmonic Orchestra
 Catholic Charities Southwestern Ohio
 CHIPs Workforce Alliance
 Cincinnati ToolBank
 Cincinnati Tri-State Chapter of the American Red Cross
 Companions on a Journey Grief Support
 Fairfield City Schools
 Family Promise of Butler County
 Fitton Center for Creative Arts
 Fort Hamilton Hospital Foundation
 Friends of MetroParks of Butler County
 Girls on the Run Greater Cincinnati
 Great Miami Valley YMCA
 Greenwood Cemetery Association
 Hamilton City Schools
 Hamilton Living Water Ministry, Inc.
 Hamilton Parks Conservancy
 Hamilton Police Department
 Hamilton Urban Garden
 HOPEfull Pastures Therapeutic Farm

Hopes Closet
 Inspiration Studios, Inc
 JEE Foods
 Junior Achievement of OKI Partners, Inc
 Law Enforcement Foundation
 Luke 5 Adventures, Inc.
 Miami University STEAM Studio
 Mini Grants 4 Teachers
 Morgan Township Fire Dept & EMS
 New London Hills Swim & Tennis Club
 New Miami Fire Department
 Ohio State University BC Extension
 Operation Blessing Bag
 Parachute Special Advocates For Children Of Butler County
 Pyramid Hill Sculpture Park & Museum
 Reach Me, Inc.
 Ross Local Schools Choral Association
 Ross City Schools
 Sleep In Heavenly Peace Inc
 Society of St. Vincent de Paul St. Joseph Conference
 St. Clair Township Fire Department
 St. Julie Billiard Conference, St. Vincent de Paul
 The Lonely Entrepreneur
 Ticket To Hope
 Trenton Fire Department
 White Oak Christian Church
 Women Helping Women

FAIRFIELD COMMUNITY FOUNDATION

Fairfield City Schools
 Fairfield Township Fire Department
 Fairfield Township Veteran's Memorial
 Fairfield Parks and Recreation

ROSS COMMUNITY FOUNDATION

Butler Philharmonic Orchestra
 Harts for Hope
 Inspiration Studios, Inc
 Ross Local Schools Choral Association
 Ross and Morgan Ministries
 Ross Band Boosters
 Ross Local School District
 St. Joseph Consolidated School

SCHOLARSHIPS

Scholarship and Opportunity **A Student's Story**

Student scholarships from Hamilton Community Foundation (HCF) are designed to give back to local students. For one student, Victoria Arno, her scholarship is helping her follow her dream of becoming a nurse while she studies at Miami University Hamilton.

"Receiving the HCF scholarship means the world to me," said Victoria, who will graduate with a Bachelors of Science in Nursing (BSN) degree in May 2024. "The reason why I applied for this scholarship in the first place was because there was a good chance that I wouldn't be able to attend Miami University without it."

Victoria has dreamed of being a nurse since she was young,

inspired by her mother, and other family members, who pursued a similar path. Because of the HCF scholarship, she has been able to focus on her BSN studies while working part-time, all without having to take out student loans. After she graduates, Victoria plans to continue her education by pursuing a Masters of Science in Nursing (MSN) degree at Miami University.

"Since I did not have to withdraw a loan to pay for my BSN tuition, I could start saving up for my MSN right away," Victoria said. "I am proud to say that as of February 2024, I received my acceptance letter to attend Miami University's Family Nurse Practitioner program."



VICTORIA ARNO

2021 John A Shafer Nursing
Memorial Scholarship Recipient

In 2023 the foundation was able to provide over a million dollars in scholarships to support more than 350 area students.



Friendship, Longevity, and Education

A story of scholarship with Dave and Ron

Friendship sometimes blooms from unlikely places. That was the case for Dave Lippert and Ron Smith who met over fifteen years ago when the pair were asked to join the scholarship selection committee for the Hamilton Community Foundation (HCF).

Back then, the HCF's scholarship selection process involved a hefty stack of binders and a stack of homework for the committee's volunteers. Both Dave and Ron were new to the committee, new to the Foundation, and facing a new learning curve as they tried to evaluate the prospects of future scholars. Over the next few years, Dave and Ron realized that they possessed the qualifications to allocate scholarship funds, but

they also developed a deep sense of empathy toward the applicants. They understood the importance of this decision-making process and the impact it could have on the hopeful individuals who applied. This mutual love for encouraging the next generation of learners led to mutual respect and friendship that often manifests itself through amusing conversations.

"He'll take everything I say and improve it," Dave said when discussing his and Ron's role on the committee. "Just take whatever Ron says, then in parentheses afterward put 'Dave agrees.'"

Lines like this show not only the fun-loving relationship the two share, but also the immense mutual respect the pair has for one another. Despite their quick wit and fun banter, Dave and Ron are reluctant to talk about themselves. For them, everything is directed back to the students and

how the scholarships they receive encourage them to continue to strive for their goals.

"What this scholarship does is offer them a way to pay for their education," Ron said, breaking his usual jovial demeanor. "More than that, it shows them that someone really cares for them and their education."

It is undeniable that Dave and Ron do care. Both retired, the pair agrees that since they have stepped away from their careers, they are busier today than they were when they had full-time jobs. Starting with the scholarship committee, Dave and Ron are both committed to helping young adults continue their education. That is the nature of their relationship, not only with each other but with the students whose applications they review. It's all about encouraging others to do great things.

"When I see what some of these students have to go through, those things strike me," Ron said after a moment of silence. "Think about how you want to use your funds for the future and think about how it can be used to help others carry on."

That's his advice for scholarship recipients, and in a sense for himself. Communities grow strong when its members give back (and Dave agrees).



FINANCIALS

STATEMENT OF FINANCIAL POSITION DECEMBER, 2023 & 2022

(Unaudited Statement)

Assets	Hamilton CF	Fairfield CF	Ross CF	TOTAL 2023	TOTAL 2022
Cash and Cash Equivalents	5,624,105	357,038	19,652	6,000,796	5,868,147
Prepaid Assets	868	-	-	868	868
Investments	112,267,998	4,860,958	825,510	117,954,466	104,960,310
Property and Equipment, Net	3,144,219	-	-	3,144,219	3,354,108
Notes Receivable	18,896,446	1,500	-	18,897,946	19,361,178
Discount on notes receivable	-	-	-	-	-
Other Assets	98,845	-	-	98,845	98,845
Reserve for Uncollectable A/R	(425,000)	-	-	(425,000)	(425,000)
CSV-Life Insurance Policies	148,953	-	-	148,953	381,979
Accrued Interest	946,070	-	-	946,070	916,070
Total Assets	140,702,507	5,219,496	845,163	146,767,167	134,516,510
Liabilities & Net Assets					
Liabilities					
Accounts payable	92,099	-	-	92,099	1,624,872
Grants payable	385,175	-	-	385,175	415,752
Note Payable US Bank	10,500,000	-	-	10,500,000	10,241,517
Renewable Scholarships payable	198,250	30,500	-	228,750	284,800
Renewable Scholarships long term	457,600	-	-	457,600	457,600
Accrued expenses	120,965	283	-	121,249	97,540
Agency Liability	2,097,340	-	-	2,097,340	1,844,760
Total Liabilities	13,851,430	30,783	-	13,882,214	14,966,843
Net assets					
Assets W/O Restrictions	30,085,787	532,646	856	30,619,290	28,307,688
Assets W/ Restrictions	96,765,289	4,656,066	844,306	102,265,662	91,241,977
Total Net Assets	126,851,077	5,188,712	845,163	132,884,952	119,549,666
Total Liabilities & Net Assets	140,702,507	5,219,496	845,163	146,767,167	134,516,510
Contributions received	8,672,583	1,032,722	310,647	10,015,953	13,994,134
Grants disbursed and accrued	(8,608,450)	(586,040)	(55,700)	(9,250,190)	(6,589,335)
Investment income received	2,453,774	88,666	12,270	2,554,710	2,589,434
Market adjustment (+) gain or (-) loss	10,837,220	430,697	59,431	11,327,349	(21,000,191)

New Investment Consultants for the Hamilton Community Foundation

The Foundation has long held on to a core goal: to maximize the impact of the gifts we receive from our generous supporters through the responsible growth of the funds entrusted to us. In 2023, we took a significant step forward in this mission by entering a new investment partnership, sowing the seeds of future success for the community we cherish. Our new partners, Merrill Lynch's Investment Advisors the Evelo | Singer | Sullivan | Bruegge Group and JEMM Global Institutional Consulting Group are a team of fiduciary advisors with a track record of excellence in the field of institutional consulting. Jack Whalen, the Chair of the Foundation's Investment Advisory Committee, shared his enthusiasm about the collaboration: "Having worked with these advisors for nearly a year, we're exceedingly impressed by their stellar performance and their commitment to proactive communication. They've introduced innovative strategies and ideas that I'm confident will greatly benefit the foundation in the foreseeable future."

The advisors have long been recognized for their success, being named among the top 100 on Baron's list of Institutional Consulting teams and ranking #1 on Forbes' list of teams in Ohio. David Singer, Managing Director of Merrill Lynch Private Wealth,

expressed his anticipation for the ongoing partnership: "We're excited to continue our work with the Foundation, aiming to help further your impact in the community through the strategic growth of these charitable funds."



"We're excited to continue our work with the Foundation, aiming to help further your impact in the community through the strategic growth of these charitable funds."

David Singer, Managing Director
of Merrill Lynch Private Wealth



The Next Generation of Female Leaders in Hamilton



MEET SOME OF OUR 2023 CLASS MEMBERS

Since 1997, the Women's Fund, has been a powerful force in the Hamilton Community Foundation (HCF). By endorsing and supporting women in the Hamilton area, the fund raises money for programs that support women, such as the Foundation's Women Inspiring Philanthropy Initiative (WIPI). WIPI is expanding the number of women in our community who are connected to the agencies bringing social change that improves the lives of women and girls. Through education, a personal philanthropy plan, and respectful conversation with a variety of women we will develop philanthropic leaders for years to come.



CATHERINE RENTSCHLER

A fifth-generation Hamiltonian, Catherine is the senior sales manager at Spooky Nooks Sports. "It's critical to the continued growth of our larger Hamilton community that we invest in providing the necessary resources for women to overcome societal hurdles and reach their full potential," Catherine says.

EMMY PIATT

The Branch Manager for Hamilton Lane Library, Emmy was drawn to the Women Inspiring Philanthropy program because she was looking for new ways to give back to Hamilton. "I wanted to apply for the inaugural year of Women Inspiring Philanthropy because even after all my years as a Hamilton resident I love learning new things about my city and was excited to find a new way to help," says Emmy.



SARA SILVA

Sara, who works in the Department of Neighborhoods for the City of Hamilton, strives to bring both current and future residents together in Hamilton. "The Women Inspiring Philanthropy invitation and initiative immediately sparked excitement within me because of its empowering mission," says Sara.

Class Members

Ann Marie Cilley
Owner Casual Pint Hamilton

Chamina Curtis
YWCA Hamilton

Paige Hufford
ODW Logistics

Catherine Rentschler
Spooky Nook Sports

Bethany Spaeth
Presto Sports

Jennifer Clark
Miami University Regionals

Arnita Gunn
Fitton Center for Creative Arts

Emmy Piatt
Lane Public Library

Sara Silva
City of Hamilton

Samantha Wyatt
Hamilton City Schools

Mini-Grants Lift Up Hamilton Teachers

One of our newest and most exciting programs, the mini-grants for teachers project is designed to help a wide range of educators across our community get the supplies they need to support a productive classroom environment. This was the first year of the mini-grant program and we were pleased to award up to \$300 in support for 55 teachers in the Hamilton City School District. According to Adoptaclassroom.org, the average teacher spends \$860 of their own money on supplies and as many as 16% hold second jobs to support their education career. Our education committee has seen these challenges firsthand, and the goal of the mini-grant is to help offset out-of-pocket spending by Hamilton's fine teachers.

"Every year I spend hundreds of dollars on my classroom," said Kelly Wright, a fourth-grade science and math teacher at Linden Elementary, and a recipient of one of the mini-grants. "I've never received any outside assistance there. And so, [the mini-grant] was really nice. It puts money back in my pocket."



The grants went to dozens of unique classroom items that create a more vibrant and stimulating classroom environment. Teachers submitted lists of specific items that their classrooms needed, including:

- Classroom organizational tools, such as bins, tubs, and storage containers
- Sensory and flexible seating options, including wobble stools, wobble cushions, and sensory swings
- Classroom technology and accessories, notably bulk headphones for students and writing tablets
- Educational toys and games, such as STEM building toys, puzzles, and board games
- Teaching aids and decorations, including dry erase boards and markers, posters, and light filters for calming classrooms

The education committee is eager to increase the amount of money available to teachers in the coming year, due to the overwhelmingly positive and thankful feedback from teachers.

"They [my students] literally **cheered** when I emptied a new box of dry-erase markers into our bin. We use those supplies **every single day** and they really appreciate a new, fresh product that is working."

Kelly Wright

Fourth-Grade Science and Math
Teacher at Linden Elementary



Leaving a **LEGACY**

Legacy is about more than just keeping a name alive. It's about contributing to the future of a community. The money our generous benefactors donate goes to the cause of their choice.

Whether our donors choose to give their legacy gifts to education, arts and culture, or unspecified projects, they can trust that what they leave behind will help the next generation thrive.

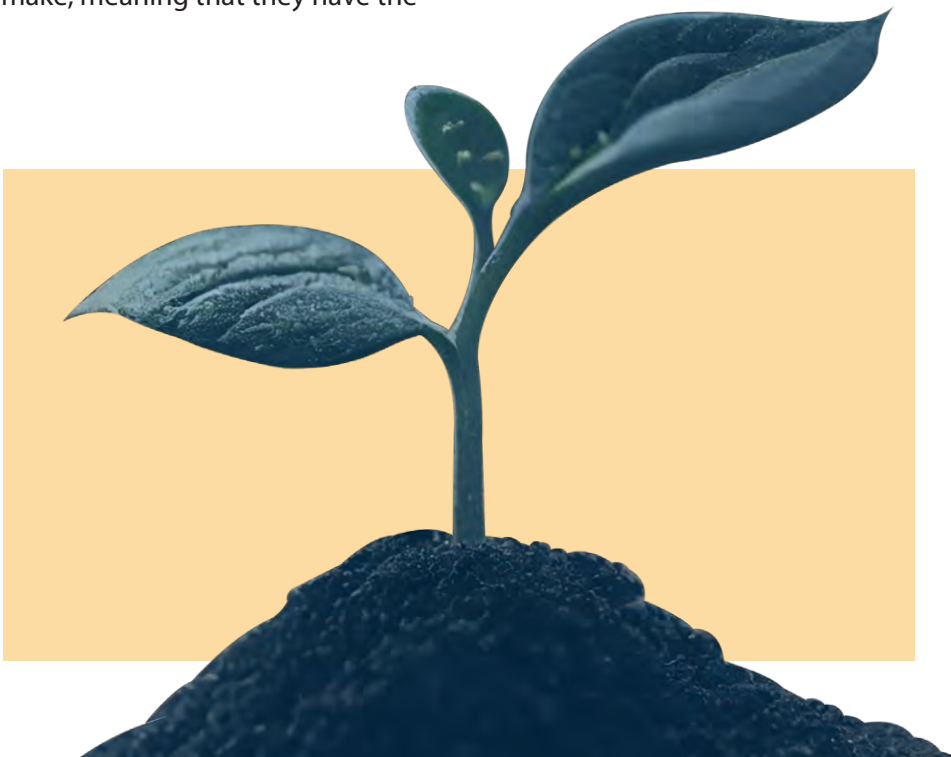
The Hamilton Community Foundation gives our legacy donors the flexibility to change their charitable elections without updating their estate documents with paid professionals. We also offer advanced options like Charitable Annuities that allow a donor to benefit from their legacy gift in life. Legacy gifts are often the largest one-time gift a family will make, meaning that they have the

most impact. These gifts give back to the community that our donors cherish and it allows them to support a cause they care about after life, without a sizeable financial sacrifice upfront.

We are so grateful to our legacy philanthropists for all that they do. The choice to leave behind a legacy gift cements these donors as more than just a name. A legacy gift ensures that they will be an active and beloved member of the community long after they have passed.

Current Legacy List

Anonymous (7)
*Elizabeth Allen
*Paul A. Armstead
*Joseph John Auraden
*Louis "Luke" Barich
*Mary Virginia Bast-Connelly
Robert Jacob Bastian
*Edward & *Alice Bauer
*Isabel Beardsley
James W. & Mary Becker
*Dorothy Bronson Beeler
*Dick & Joan Beer
*Anne R. Bever
*Audre M. Belew
David L. & *Margery Beckett Belew
*Paul Benninghofen
*Dr. Doris Bergen
*James & Anne Bever
*John R. Bieker
Walter B. Blair
*William & Renee Boehm
*Betty J. Bonar
Carole A. & Darel Bono
Bob Borden
*Clyde Bowden
Katie & Gregory Braswell
*Jack & *Melva Wittman Brenner
*W. Otis Briggs, Jr. & *Virginia Briggs
Marcia Koehler Bunce
*Agnes White Burgess
*Dr. Richard P. & *Marilyn Burkhardt
*Russell & *Edith "Dee" Burkhardt
*Dr. James R. & *Anne B. Carr
*Ralph R. & *Donna Carruthers
Sara Procter Carruthers
*Donald S. & *Marian Cisle
*Thelma Clark
*L. P. Clawson
Honi & Neil Cohen
*Michael J. Colligan
Tom & Kay Collins
Christopher M. Connell & Wendy L. Waters-Connell
*Margaret & *Earl Conrad
William & Ann Coombs
*William & *Barbara Dayton Copeland
*Catherine Dare
*Thelma W. DeLaCroix
Michael & Lucinda Dingeldein
*Mary Helen Dolan
*Sanford Eaffy
*John W. Eaton
*Helena Edmunds
*Betty A. Edwards-Weil
*Bob & Nelda Ernst



Current Legacy List Continued

Mary Pat Essman	*T. Edward & *Hannah Knapp	John & Ellen Reister	*Fred & *Susan C. Thum
*Paul & Patricia Everhart	*Joe & *Lois A. Koefler	*Walter A. & *Edith Beckett Rentschler	*Albert J. & *Mary K. Tillmann
*Edwin & *Esther Feinthal	*Mr. & *Mrs. Charles T. Koehler	*Jessie & *Bessie Richter	*Diane Tillmann
*Albert C. & *Margaret C. Fiehrer	David A. & Karen Underwood Kramer	*Marie Richter	Steve & Linda Timmer
Cora & *Robert Fiehrer	*Dr. Carole J. Kuhn	*Emma Ritchie	Darren & Cynamon Trokhan
*Dr. Joel Fink	Michael R. & Kelli Verdin Kurtz	*Robert, *Martha & *Dorothy L. Rooke	*George W. Turnbull
*Cyrus J. & *Elaine J. Fitton	Helen K. Lambertson & Chuck Sprague	*Albert & *Shirley Roy	*Margaret Turnbull
*Mr. & *Mrs. Donald W. Fitton, Jr.	*Louise Lang	*Dorothy C. Ruoff	*Alma I. Unzicker
James & Susan Fitton	*Beverly B. Latta	*Mrs. Doris Sanders	Mrs. M. David Urmston
*Marion S. Fitton	Dr. Robert J. & Janis Lerer	Herman R. & Ingrid E. Sanders	*John & *Clara Wallace
Thomas R. Fitton	*David Leshner	*Ralph A. & *Nellie Manring Sauer	*Buddy M. & Athalene Wallin
*Vaden & *Grace Fitton	John & Heather Lewis	*Madge S. Schaeuble	Kathleen K. Walsh
*George J. & *Sudie M. Flick	*Harry & *Martha Lingal	*Jerry Schick	*David & Jean Weeks
Rick Flick	*Calvin & Maryann H. Lingler	*Donald & *Millicent Schirmer	John A. & Karen P. Whalen
Harold Flowers	*Dr. John Long	*Robert Schlenck	*Lawrence & *Adela Wheeler
Nancy Belew Follmer	Dr. & Mrs. Dan Love	George & Rhonda Schmidt	J. D. & Jill White
*Camilla Frechtling	*Georgia Lukes	*Joel H. & Marilyn O. Schmidt	Robert B. Wile
*Edward & *Josephine Frechtling	*Donald S. & *Jennie E. Martin	*George & *Betty Schrage	Frank N. & Nancy D. Wiley
*Thomas E. Fritsch	*Gary Martin	*Adrian & *Anna Schulteiss	Mr. & Mrs. Craig F. Wilks
Patricia L. Froelke	*Ruth I. Maurer	*Myrna Schwarm	*Francis Wilks
*Dorothy A. Gard	Anne G. McAdams	*Virgil M. Schwarm	*John K. Wilson
*Ruth W. Garrett	*George C. & *Freida B. McCandless	Katherine S. Schwarz	James L. Winkle
*Austin & *Lois Gleason	*Dennis McGonagle	Gerald & Sheryl Scrivner	*Jean E. Wolf
*Joseph B. Gogolach	*Karen Metcalf	*Gladys S. Sepin	Leota Wolf
*Fannie Gray	*Dana & Martha Mehl	*John A. Shafer	Phyllis Wykoff
*Jeanne & *Emerick S. Gross	*Albert W. & *Jane B. Miller	Joshua A. & Frances Smith	*Mary J. Wys
Jackie & Bill Groth	*Lillian Millikin	Alice E. Smith-Abata	*Adeline Zoller
*Mr. & *Mrs. I. Richard Groves	*Marlene L. Moore	*Kenneth H. & *Phyllis R. Snyder	
John & Judy Guidugli	John & Shirley Moser	*Louis C. & *Constance Sohngen	
*Mildred Hackley	*William Murstein	*Robert M. & *Helen Sohngen	
Dr. Bennyce Hamilton	*Janice Osborne	Martha Jane Spain	
Gerry A. Hammond	*Josephine Osso	Billie Jo & David Spicer	
Scott & Jill Hartford	*Howard & *Eva Ottman	Laurin & Lisa Sprague	
*Mary Helen Hauser	*Herbert G. Pabst	*William E. & *June W. Steed	
*Marian F. Hawk	Cynthia V. Parrish	James & Cynthia Stever	
*Robert E. & Shirley A. Hill	*Huntington V. & *Katherine A. Parrish	*Dr. James A. Stewart	
*Robert L. & *Mable I. Hill	Lee & Jackie Parrish	Jacob & Taylor Stone-Welch	
*John A. & Corrinne *H. Hock	Pat & Debbie Pawling	*Albert Stuhmueller	
*Marie Hoerner	*Howard & *Gladys Pearson	Betty J. Terry	
*Butch Hubble	*Rita L. & *Walter Pond	Gail P. Thornton	
*Joseph C. Hubner	*Alberta F. Pratt		
Clarence R. Huening	Mae K. Prentice		
Bernice Huff Roop	*Grayce Willis Pryor & *Roy Pryor		
*Emma Hughes	*Herbert & *Olive Randall		
*Eugene H. Hughes	*Robert C. & *Gertrude Rathgens		
*Paul W. & *Ella D. Hugus	*Harry T. Ratliff		
*Robert E. & *L. Gail Ireland	*Emily B. Reed		
*Marie Iutzi	*John & Lori Rehm		
*Carl & Anne Jantzen	*Mary J. Reimer		
*Carl & *Freda E. Jennewein	Marcia Reist		
*Leland Johnson			
*Lazard Kahn			
*Priscilla Keely			
John & Kimberly Kirsch			
Kathleen L. Klink			

(Updated as of April 2024)

***Indicates Deceased**

Thank you!

YWCA



Nonprofit organizations play an essential role in our society. They provide vital services and programs that support the community and individuals in need. However, running a nonprofit organization can be overwhelming, especially when it comes to financing and fundraising. That is where the Hamilton Community Foundation comes in.

The Community Foundation offers services like endowment investment management, and gift facilitation for over 25 different non-profits in the community, in addition to other tools that help organizations receive and effectively benefit from gifts. YWCA Hamilton is a mission dedicated to eliminating racism and empowering women since 1902. They were one of many deserving recipients to receive a surprise grant of a million dollars from billionaire philanthropist Mackenzie Scott. Their Board of Directors entrusted the allocation of these funds to the Hamilton Community Foundation. Wendy Waters-Connell, CEO and Executive Director of the

How the Community Foundation Partners with Local Nonprofits Organizations.

Hamilton YWCA, noted that entrusting the Hamilton Community Foundation with making these investments allowed their team to focus on other work in the community, like helping families fleeing domestic violence, housing chronically homeless disabled individuals, and building empowered youth to be strong leaders in the future. Endowment expertise is just one role the Hamilton Community Foundation plays in assisting the

YWCA Hamilton. The Foundation also plays a key role in supporting generous donors, like Paul & Ella Hugus, who give estate gifts or other assets to worthy nonprofits like the YWCA Hamilton. The Community Foundation, in turn, stewards and invests these assets, ensuring they are wisely maintained so their value has maximum potential for long-term growth. "Our board determined it would take \$40 million in an



“Any time I can **stand up** and **support** this organization, I’m happy to do so, helping to **build the next generation of givers.**”

- Wendy Waters-Connell
CEO and Executive Director of the Hamilton YWCA

endowment to operate our entire mission without additional funding. Our partnership with the Foundation allows us to work toward this goal by managing these gifts from the Hugus & Scott families; we’d like both of our funds to support our mission in perpetuity,” explains Waters-Connell. Waters-Connell has personal connections to the Community Foundation as well - a scholarship through the HCF helped her attend Miami

University’s nursing program. This system of support has led her to make sure YWCA Hamilton receives something as part of the Waters-Connell family’s legacy. Their future gift is a way to perpetuate the work she every day to eliminate racism and empower women. “They have been such a good friend to the YWCA Hamilton; a full-circle, full-life foundation of giving to strengthen our community,” Waters-Connell says. “I have a strong

commitment to the Hamilton Community Foundation and all the historic philanthropists who have made a difference in our community. Any time I can stand up and support this organization, I’m happy to do so, helping to build the next generation of givers.”

Expert Training

to Boost Non-Profits



We believe that the future is bright when individuals dedicate their time to giving back to the community. That is why on September 19th and 20th the Hamilton Community Foundation and the Middletown Community Foundation held a two-day seminar on fundraising for local nonprofit leaders. Hosted at Butler Tech, this exclusive event designed to empower our community was led by Bobbie Donahue, MBA, CFRE, a teacher/practitioner and adjunct instructor at the Indiana University Lilly School of Fundraising. We are always mindful of sharing our resources with the

organizations we support, and one of the best ways to do that is by hosting courses taught by local experts like Bobbie. The focus of this seminar was the basics of fundraising, a topic that these dedicated leaders otherwise may not have had the opportunity to study.

"This was life changing for us," said Christa Carerro, Founder and CEO of HopeFull Pastures, a nonprofit that helps youths overcome fear, loss, and trauma. "I feel like a huge weight has been lifted because we can move forward with a plan."

This course taught participants about many different aspects of nonprofit work, including how to create a mission statement, how to establish a board, and how to create a fundraising action plan. Bobbie used her education and experience to keep the class engaged and answer the real-world questions they had about running a non-profit. We thank Butler Tech for their hospitality, the Butler Tech Culinary Team for breakfast and lunch on both days and, of course, Bobbie Donahue for sharing her vast knowledge with our participants. The overpouring of gratitude from the attendees proved what a worthwhile endeavor this course was. "Thank you for this," said Shawn Higgins, Executive Director of the Fitton Family YMCA. "My thoughts are organized, and I've been able to come up with some tangible ideas to share over these last two days."



Giving with PURPOSE

The Foundation's team, reflecting on our experiences, has been profoundly moved by the remarkable causes we have witnessed our community rally around. A significant amount of our effort, passion, and energy is invested in identifying and understanding these community needs. Interestingly, it's not just the selection of causes that demonstrates deep consideration; the process of how donations are funded reveals an equally thoughtful journey for many donors.

Contrary to what some might think, the act of giving transcends the pursuit of tax benefits. However, it's undeniable that maximizing the efficiency of donations enhances

their impact. This realization underscores one of the foundation's pivotal roles: guiding donors through the array of tools and strategies available for charitable giving.

Whether it involves recurring contributions or tapping into non-cash assets such as stocks, property, or even a business, the Foundation's team is privileged to work closely with donors to help chart the best path forward. This direct engagement allows us to better grasp our donors' passions and be their trusted advisor for charitable giving. For those thinking about creating or revisiting their charitable plans, we extend a warm invitation to get in touch. Recently, our team has updated the

"Guide to Creating Your Personal Giving Plan," and we are eager to explore its insights together with you. We are committed to making every act of giving purposeful and impactful, embracing the opportunity to support each of our donor's unique journeys toward making a difference.



Welcome Jacob Stone-Welch!

The Hamilton Community Foundation was overjoyed to announce the addition of our newest team member, Director of Donor Services Jacob Stone-Welch. This new position reaffirms our goal of continued expansion to better serve Hamilton. Previously, Jacob held the roles of Customer Experience Manager and Public Communication Specialist with the City of Hamilton. His familiarity with the community and experience with public service make him one of Hamilton's foremost experts on local charitable pursuits. He is ecstatic to work with all our donors to help make Hamilton an even better place to live!



"I'm absolutely thrilled to have the chance to work alongside donors and help them make their philanthropic visions a reality. The Hamilton Community Foundation has a remarkable legacy of making a genuine difference in our community, and I feel honored to be a part of it. Being able to continue serving in a role where I can make a meaningful impact is truly a dream come true."

Jacob Stone-Welch
Director of Donor Services

Hamilton Community Foundation

319 N. Third Street

Hamilton, OH 45011

513.863.1717

hamiltonfoundation.org

Address Return Service Requested



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.

