# **Connections** from our **Home** to Yours

HAMILTON COMMUNITY FOUNDATION & AFFILIATES FALL NEWSLETTER 2024

# Reflecting on 25 years of service to the Foundation

By John Guidugli, President & CEO

I remember the first time I visited the offices of the Hamilton Community Foundation in 1999. I was so impressed with the Lane Hooven House, the home of the Foundation. I fell in love with the architecture and the history of the building.

This German Village treasure intrigued my imagination and encouraged me to learn more about this place, these people, and the work they did. And while the building drew me in, it was the mission of the Foundation that captivated me and eventually convinced me that this was the place I wanted to spend my career making a difference in this community.

The more I learned about the Foundation, the more I understood the true meaning of community. I began to learn about the generosity of the Foundation donors, the vision of the Foundation Board, the dedication of the Foundation staff and the specialness of this community. Over the ensuing years I learned that the Hamilton Community Foundation was a trusted and valued resource in this community, and that the Foundation could – and probably should – play a significant role in the future growth and development of Hamilton.

Over the last 25 years, I have had the

Hamilton and the Foundation have faced our share of challenges and difficulties. We have persevered and succeeded because we saw the value of working together and supporting one another. We bought into the concept that a rising tide lifts all boats – that together we could accomplish so much more than we could as individuals.

So, as I look back at 25 years here, I wonder where the time went, but then I look around and see all the places and projects the time went to supporting. From all of the scholarships and grant awards to all of the community building and economic development efforts to all of the relationships created and nurtured, I am in awe of what we have accomplished. And I am grateful to everyone who supports the work of the Hamilton Community Foundation and embraces the success of the city of Hamilton – thank you for letting me be part of this amazing journey.



Meet Our New





DIFFERENT DONORS

(691 OF WHICH WERE NEW DONORS)



distinct pleasure and honor of leading this amazing organization. I've witnessed tremendous growth both at the Foundation and in the City of Hamilton. None of this growth came without vision, dedication, collaboration, and a "can do" attitude.

Hamilton and the Hamilton Community Foundation are where we are today because we, as a community – as a people – refused to accept the notion that we were an old industrial city with a great past and a diminished future. We committed ourselves to celebrating our storied past and embracing a vibrant future.

# **Board Chair**

Bob Long has been elected as the new chair of the board for the Hamilton Community Foundation during this year's Annual Meeting. A retired educator, Bob has been a dedicated member of the Foundation's Scholarship Review Committee, Education Committee, and the TAP Scholarship initiative for many years. As Bob steps into this role, he is eager to work collaboratively with fellow board members and community stakeholders to advance the Foundation's mission and create lasting change.

SUPPORTING 550+ ORGANIZATIONS & 600+ STUDENTS



1

#### **Introducing the PROTOCOL Progress Fund: New Fund** A Legacy of Community for Lindenwald Highlight

The new PROTOCOL Progress Fund for Lindenwald is a celebration of one man's love for his community and his commitment to its future. Longtime resident Frank Downie, who has called Lindenwald home for nearly 70 years, established the fund to ensure the neighborhood he cherishes continues to thrive.

This new fund honors the values of the neighborhood group PROTOCOL, People Reaching Out To Others Celebrate Our Lindenwald, which Frank helped create. PROTOCOL has been a cornerstone of the neighborhood, fostering unity and encouraging residents to become more involved.

The Fund will focus on enhancing the neighborhood's vibrancy and fostering a lasting sense of community, with a preference for initiatives recommended by PROTOCOL—such as the recent Porch Fest community event and beautification projects along Pleasant Avenue.

"Knowing that there will be funds available for future community advocates to tap into and improve the quality of life here is heartwarming," Frank shared. His hope is that this fund will help inspire others to take an active role in supporting the neighborhood for years to come.

Frank's connection to Lindenwald runs deep. His father worked in Hamilton, eventually purchasing Federle Wholesale Florist, which Frank managed after his father's passing in 1974. Although a later career change led him to other opportunities, Frank remained loyal to Lindenwald, continuing to live in the same home he purchased in 1976. Today, Frank enjoys spending time with friends, gardening, and staying connected with the neighborhood he loves.

Frank invites others to join him in growing 40<sup>th</sup> Downie the fund's impact. "I hope many of our community supporters from over the years will come together to make this fund more and more impactful," he said.

By carefully managing and growing the fund over time, the Community Foundation will grant a portion back annually to support meaningful projects. This ensures that Frank's vision-and the generosity of all who contribute-will create lasting change, enriching the Lindenwald neighborhood for generations to come.

# **2024 Annual Meeting**

This year's annual meeting celebrated both the accomplishments of the Foundation and the tangible impacts we are making in the community. A key focus was on leadership development initiatives led by the Foundation, including Hamilton LINKS, the Women Inspiring Philanthropy initiative, and Youth Philanthropy.

Board Chair, Cynamon Trokhan, reflected on the importance of unity, emphasizing the need to focus ourselves on the positive impacts of the work we do to help move our community forward. The meeting also introduced next year's





we me



# Congratulations Educators.

This year marks the 22nd Annual Harry T. Wilks Hamilton Celebrates Education event, where we take a moment to recognize the incredible educators who work tirelessly every day to support the young people in our community.

Thanks to the generosity of the Harry T. Wilks Foundation, 19 exceptional educators from local schools were honored earlier this year. These honorees—ranging from teachers to counselors and custodians-were nominated by their schools for their impact, leadership, and creativity in shaping the future of our students.

Continuing Mr. Wilks' tradition of championing education, each educator received a \$1,000 grant from the Foundation to further their work. We are proud to carry forward his legacy and celebrate the individuals who make a difference in our schools every day!

#### Congrats to this year's Educators in Excellence

Connie Arnold: 5th grade teacher at St. Ann Catholic School Don Austing, Head of Maintenance at St. Peter in Chains School Angela Breetz, Chair of Science Department and Teacher for Biology, Anatomy and Physiology at Stephen T. Badin High School Rachel Bridgeford, Intervention Specialist at Fairwood Elementary Camille Dainton, Secretary at Wilson Middle School Kari Espel, Math Instructional Coach at **Riverview Elementary** Shannon Frey, Art Teacher at Garfield **Middle School** Emma Hauer, English Teacher at Hamilton High School - Main Campus

Barb Haven, Custodian at Linden Elementary

Brittany Johnson, Math and Science Teacher at Crawford Woods Elementary Lisa Markley, Junior High Math Teacher at St. Joseph Consolidated School Jenna McSwain, Intervention Specialist & Dean of Curriculum & Instruction at **Immanuel Lutheran School** Victoria Monroe, 3rd and 4th grade teacher at Bridgeport Elementary Tami Morgan, ELA Teacher at Brookwood Elementary Amy Park, Intervention Specialist at the Miami School Chris Schanding, Math Teacher at Hamilton High School - Freshman Campus Robyn Schlabach, 4th grade Teacher at Queen of Peace School Katie Sextone, Safe and Secure Monitor at Ridgeway Elementary Allison Whalen, ELA Teacher at **Highland Elementary** 



## **Ross Founders Honored with Belew** Legacy Award

The Foundation is proud to share that Martha and the late Dana Mehl were selected as the 2024 recipients of the David L. Belew Legacy Award.

In 2022, they founded the Ross Community Foundation, the first Affiliate Foundation of the Hamilton Community Foundation, helping to raise over \$500,000 in its first year. Their vision and leadership have continued to grow the Foundation, with the Impact Fund now surpassing \$800,000.

Wendy Fetters, Vice Chair of the Ross Community Foundation, shared her excitement about the recognition, stating, "It's incredible to see Dana and Martha being honored for everything they've contributed, not just through the Community Foundation but throughout their lives. They've been dedicated to this community in ways big and small, and this award is a beautiful way to acknowledge their lasting impact on our communities."





# ROSS Matter

# **Ross Celebrates Inaugural Business & Donor Meeting**

The Ross Community Foundation proudly hosted its first Donor Appreciation & Business Meeting in October. The event brought together over 60 attendees to celebrate the Foundation's impactful \$40,000+ investment back into the community and the achievement of raising an \$800,000 nest egg for the Unrestricted Community Impact Fund. The event served as an opportunity for the Foundation's board, along with their partners at the Hamilton Community Foundation, to thank and recognize founders and donors for their generous support and continued commitment to the community's growth.

"We are immensely proud of our volunteer board and the ongoing support from our communities," said Martha Mehl, Founder and Board Chair of the Ross Community Foundation. "In just a short time, we've seen incredible generosity and a shared commitment to making our region thrive."

The event also highlighted the Foundation's Community Harvest Campaign donors, which was launched earlier this year. Since then, the campaign has attracted several donations, including those from new donors. The campaign encourages individuals and businesses to give, emphasizing that every dollar counts in building a stronger, more vibrant community. The Foundation's 2024 goal is to raise \$150,000 to support the Unrestricted Community Impact Fund, ensuring that all donations-whether large or small—play a vital role in supporting local projects.

Founded in 2022 by Martha and the late Dana Mehl in partnership with over 40 local families, the Ross Community Foundation serves not only Ross but surrounding communities. This includes grants made to organizations like Harts for Hope, which operates both in and outside Ross. The Foundation is the first affiliate of the Hamilton



#### Welcome New Ross **Board Members**

I am thrilled to be part of the Ross Community Foundation. This organization is making a meaningful impact on families and individuals right here in our community, not just today but for years to come. The Foundation is building our capacity to enhance lives and build a stronger community, and I want to be a part of that.



My family and I have always been passionate about supporting our community. Since opening Eli's Sports Bar and Grill, we've been involved in supporting many different organizations. I'm honored to join the Foundation and excited to see where this next step in my journey of giving back leads.



Community Foundation, ensuring that contributions are invested and grown to meet evolving needs over time.

Dave Westerbeck

# **Ross Donors Expand Support for Local Classrooms**

Inspired by last year's successful classroom enhancement grants, a group of Ross donors have taken steps to further support local educators. Thanks to their generosity, we're thrilled to announce the first expansion of our Mini Grants-4-Teachers Fund. This expanded program provides teachers at Elda Elementary and St. Joseph's Consolidated School with access to quality-of-life items that go beyond standard curriculum needs. These donors even took the step of officially establishing the first mini-grants fund specific to our parochial schools: the St. Joseph School Mini Grants-4-Teachers Fund.

Through these mini-grants, teachers received decorations, classroom lighting, teaching aides, educational posters, indoor recess supplies, and classroom incentives-simple additions that make a big difference in creating a welcoming and engaging learning environment. We're grateful to these donors for investing in resources that brighten classrooms and support teachers and students alike.



L to R: Erica & Soren (Compass), Emily & Ellie (Freshman Campus), Michelle & Tessie (East), Eric & Rusty (Crossroads)

# **Grant in Action: Meet Your Fairfield Facility Dogs**

Over the past year, the Fairfield City School's Facility Dog Program has expanded to include seven facility dogs. Thanks to the support of the 'Fur Fund' and a generous \$50,000 grant from the Foundation in 2023, these amazing canine companions and their handlers have made a profound impact in our schools. The dogs provide emotional support, improve student behavior, and create special moments that enhance the learning environment. See what some of our handlers had to say about the program!



Joya & Gamma **Central Elementary** 

"Watching Gamma work is truly something special. He can pick out a student or staff member who may be having a rough day and go over to them for some Gamma Time. He encourages students to open up just by being a listening ear. Seeing the excitement of each student knowing they're valued at school is one of the best parts of being Gamma's handler."

Andrea & Warren South Elementary

"Warren has improved emotional regulation in our students by showing his own calm demeanor. Students in crisis sit with him and instinctively model his slow, calm breathing. He helps our student readers gain confidence, and he inspires me to be a consistent, positive presence for all our students.'

## Laura, Katie, & Kelsee **North Elementary**

"Often just seeing her or having her near them is comforting. She's a great companion when students are crying or upset, and I've noticed a significant decrease in time spent trying to regulate students when Kelsee is available. She's been so helpful to staff members as well-they truly love her so much! Kelsee is truly a bright spot on the most difficult days."

#### **Foundation Launches Fund to Support Home Repairs**



The Fairfield Community Foundation is proud to announce the launch of a new fund aimed at supporting local homeowners in need of assistance with property repairs. This initiative, developed in partnership with SELF (Supports to Encourage Low-Income Families) and the City of Fairfield, will provide critical resources to residents facing zoning violations due to circumstances beyond their control.

The Fairfield Helping Neighbors Fund will play a vital role in addressing essential exterior repairs for owner-occupied homes. The program focuses on supporting elderly, low-income, or disabled residents—those who may lack the means to complete necessary repairs independently.

Starting with \$60,000 for the next year, we look forward to seeing what kind of real difference this partnership can make for those who most need it in our community.

#### **Township Officially Joins Firefighter's Book Brigade**

Since its launch last year, the Fairfield Firefighter Book Brigade Fund has been a tremendous success, bringing area firefighters into our community's 1st grade classrooms to promote reading and fire safety. We're thrilled to announce that this year, Fairfield Township Fire Department has joined the effort, helping expand the program to every 1st grade



5

#### classroom in the Fairfield School District.

This initiative provides a unique opportunity for local public safety heroes to engage with students directly, combining the excitement of meeting firefighters with an educational focus on fire safety. Thanks to the Brigade, students gain valuable knowledge while developing a love for reading, and our community's bond with its public safety team grows stronger.





# Thinking Outside the DAF: Unlock Tax Benefits with Funds Beyond Donor Advised Funds

It probably would not surprise you to learn that over 42% of Americans own an IRA. In many cases, IRAs – especially for people who have rolled over one or more employer retirement plans – represent a significant portion of a household's net worth. When it comes to charitable planning, IRAs should never be ignored. Indeed, your IRA may offer some of the best opportunities to support the causes you care about.

For starters, no matter what your age, there are many benefits of changing the beneficiary designation on your IRA to name your legacy fund at the Community Foundation as the recipient of all or a portion of the account. This is an easy, taxeffective way to leave a bequest to support the causes you care about. The Foundation can help you structure the terms of your fund to match your intended charitable legacy. For example, you can make arrangements for your children to serve as advisors on the fund to recommend grants to particular areas of interest, or the Community Foundation itself could deploy the money to support the community's areas of greatest need or even the support Foundation's own mission-based initiatives.

The reason an IRA beneficiary designation is such an ideal form of charitable bequest is because of the tax advantages. Dollars flowing to the Foundation from an IRA upon your passing are not subject to estate tax. In addition, as a public charity, the Community Foundation does not pay income taxes on the IRA assets it receives.

Finally, if you have reached the age of 70 ½, you can make what's known as a Qualified Charitable Distribution ("QCD") from your IRA directly to certain charities, including a designated fund or a field-of-interest fund at the Community Foundation. You won't pay income tax on the distribution and, happily, if you've reached the age for Required Minimum Distributions, your QCDs could count toward those distributions.

The upshot? Next time you review your financial and estate plan with your advisor, take a close look at your IRAs. If you intend to leave a charitable legacy, or if you'd like to support your favorite organizations during your retirement years, your IRA may be your best bet to make a big difference in the causes you care about.

A Cautionary Tale ...

Exploring ways to give your IRA to charity can also serve as a helpful reminder to review all of your beneficiary designations. Although they may appear to be innocuous and may even be easy to overlook, those beneficiary designation forms represent actually critical components of your estate plan. To understand this, you need look no further than the cautionary tale of a Procter & Gamble employee who died in 2015, leaving behind a retirement plan.

Way back in 1987, the employee had named his girlfriend as the beneficiary of his retirement plan. Despite their relationship ending, the employee never updated the beneficiary designation. By the time the employee died, the retirement plan, which had grown to nearly \$1 million, passed via the beneficiary designation to the 1980s exgirlfriend.

designated fund

#### Margaret and Earl Conrad Riverview Elementary Enrichment Fund

Margaret and Earl Conrad dedicated their retirement to tutoring students at Riverview Elementary, where Earl was fondly known as the "Kindergarten Grandpa." This fund continues their legacy, providing enriching experiences like musical instruments for the school's music program, ensuring their impact lives on.





#### Priscilla Keely Orthodontic Fund

Established in 1962 in memory of her father & grandfather, both local dentists, this fund helps Butler County families access orthodontic care, honoring Priscilla's commitment to supporting underprivileged children in our community.





field of interest

#### Joe Nuxhall Character Education Fund

Founded in 2003 by the Nuxhall Family and Foundation, the Joe Nuxhall Character Education Fund supports speaking engagements and initiatives promoting character education in local schools, honoring Joe's legacy as a beloved Reds

## field of interest

#### Christopher S. Courtney Memorial Children's Fund

The Christopher S. Courtney Memorial Children's Fund provides grant dollars for local youth through our Youth Philanthropy Committee, honoring Chris's legacy of community dedication. Established in his memory, the fund supports underprivileged children in Butler County, ensuring Chris's generous spirit continues to make an impact. field of interest

#### Katherine S. Schwarz Fund for Natural Areas

Inspired by foraging with her mother as a child, Mrs. Schwarz established this fund to enhance natural areas and create opportunities for others to experience the joys of nature and discovery.

Katherine and her mom, Emma, getting ready to pick berries in 1951. plicher and proadcaster.

designated jund

#### John and Dolores Harper First United Methodist Church Fund

Established in 2017 by Mr. & Mrs. Harper, this endowed fund provides annual support to the First United Methodist Church in Hamilton, reflecting their commitment to sustaining the church's mission and was inspired in part by the impact of a similar fund started by another donor.

...and many more

# Gifts that keep on giving!

Thanks to the incredible generosity of our donors — both those who give today and our Legacy Society members who've committed planned gifts to the Foundation — we're able to support impactful programs and initiatives across our region. Below are a few examples of the recent grants that, together, we've helped bring to life, each one making a meaningful difference in the communities we cherish.

check out how our recent grants are empowering the communities we love!

7K

#### **Supports to Encourage Low-Income Families**

Our grant to SELF's Neighbors Who Care: Home Repair Program supports essential home repairs and mobility modifications for low-to-moderate-income homeowners who are physically or financially unable to maintain their homes. This program provides safe, accessible living spaces and strengthens the community by connecting volunteers with meaningful opportunities to help neighbors in need. Through these efforts, homeowners experience renewed comfort and security in their homes, while volunteers witness firsthand the powerful impact of community-driven support and revitalization.

#### **YWCA Hamilton**



Our grant helps launch HERstory & HERitage, a brand-new, free signature event celebrating the legacy of local women and the richness of global cultures. Open to the public, this full-day festival brings the community together with international food, arts, and entertainment, fostering inclusivity and enhancing quality of life through shared experiences that honor the beauty of our

#### **Continuing Support: BTW Community Center**

Our three-year commitment to the Booker T. Washington Community Center (BTW) supports its mission to uplift the Riverview neighborhood. Serving a diverse community, BTW offers essential programs like academic support, mental health services, and life skills training to address issues like poverty, food insecurity, and limited recreational opportunities. Under the Great Miami Valley YMCA's leadership, BTW's diverse staff is dedicated to meeting evolving community needs. With future facility upgrades through the ARPA, our sustained support will enhance BTW's capacity to create lasting impact, empowering residents and enriching the Hamilton community.

#### **Ross Middle** School



The Ross Community Foundation awarded a grant to support Ross Middle School's Jump Start Summer Band Camp, helping incoming students explore instruments and get a 'Jump Start' on their music education.

#### **Ensuring Financial Excellence with New** Auditors

While giving grants is at the heart of what we do, maintaining strong financial oversight is just as essential to our mission. We're pleased to announce that we've selected the Kirsch CPA Group as our new auditors. With a strong local presence and deep roots in our community, Kirsch CPA is uniquely positioned to guide us in this area. Their CEO, John Kirsch, recently completed a nineyear term on our board of directors, giving him and his team invaluable insights into our operations, values, and vision.

We're excited to collaborate with John and his team. who share our commitment integrity to and transparency, as we continue to strengthen our financial foundations for years to come.





# A jocus on mental health

With mental health challenges and the impact of suicide affecting so many in our community, we want to take a moment to highlight the efforts we've supported this year to address this crucial issue. Together, we're helping to build a community where mental health support is accessible, lives are changed for the better, and every individual feels seen and valued. Each of us has a role in making a difference, and we're proud to be part of this vital work.

### **Cancer Family Care**

Serving both children and adults in our region who are coping with cancer, Cancer Family Care provides direct counseling resources at little to no cost. The program aims to remove financial barriers to support, offering relief to families already under financial stress from health-related expenses.

#### Fairfield City



#### **Butler County Educational Service** Center (BCESC)



Last year, the Butler County Educational Service Center (BCESC) supported over 750 students in the Hamilton City School District alone through its School Liaisons and Success Program. Launched in 2005, the Success Program was created to remove non-academic barriers to learning - such as food insecurity, lack of medical care, and unmet mental health needs. Our recent grant ensures the continuation of this vital resource in our region. The program hires dedicated liaisons who work directly with families and students, meeting on campus or in the community. These liaisons help families access essential resources, provide ongoing support, and foster strong connections between families, the school, and community organizations.

#### **Big Brothers Big Sisters**



Our recent grant to Big Brothers Big Sisters supports their mentor matchmaking program, expanding one-toone mentoring opportunities for at-risk children in Butler County. Since 1968, the agency has helped youth avoid substance abuse and achieve lifelong success by building strong, supportive relationships with mentors. These mentors play a crucial role in enhancing mental health by providing stability, support, and guidance. Through programs like community-based, site-based, and group mentoring, they create positive, lasting impacts in children's lives.

#### **School District**



10K

When grant funding for four essential suicide intervention roles was discontinued, the Fairfield Community Foundation stepped in to help Fairfield City School District keep one position for an additional year. These specialists, who identify students at risk of self-harm and connect them to life-saving care, performed hundreds of assessments last year. Moreover, the district has also able to secure funds to sustain two more of these critical roles. This timely support gives the Fairfield City School District the breathing room needed to seek further funding, ensuring that our students continue to receive essential mental health support.

#### MindPeace

MindPeace provides in-school wellness programs that include



"MindPeace Rooms" to support student de-escalation, as well as suicide prevention and postvention initiatives for area schools. Our grant helps ensure the continuation of this valuable program in our region.



Hamilton Community Foundation 319 N 3rd Street Hamilton, Ohio 45011

#### **RETURN SERVICE REQUESTED**



#### Something Seem Different?

Welcome to our newly revamped Foundation newsletter! Inspired by other foundations in our area, we've increased the size, allowing us to include more stories, photos, and updates without compromising readability or cutting content. This larger format lets us share the full picture of our work and highlights the incredible projects and initiatives that your support makes possible. In this expanded issue, you'll find stories from Hamilton as well as our affiliate communities, Ross and Fairfield. By sharing highlights across these regions, we hope to give all our donors a holistic view of our impact and perhaps spark inspiration from the projects happening nearby. We'd love to know your thoughts on this new layout—let us know what you think!

Save the Date

Holiday Open House at the Lane Hooven House December 5, 2024 | 4-6pm

Christmas in the Village December 8, 2024



### **Thank You to all of our Board Members!**

#### **Hamilton Community Foundation**

Robert Long - Chair Andrew Schuster - Vice Chair Jason Crank - Treasurer Cynamon Trokhan - Secretary Chamina Curtis Catherine Evans Vaden "Woody" Fitton Scott Kruger Helen "Niki" Motley Susan Vaughn Mitchell Vocke David L. Belew - Trustee Emeritus

#### **Ross Community Foundation**

Martha Mehl - Chair Wendy Fetters - Vice Chair Laura Hiler - Treasurer Lisa Bosse - Secretary Joe Conrad Dave Westerbeck Dana H. Mehl - Trustee Emeritus

Our mission

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

#### **Fairfield Community Foundation**

Justin Krueger - Chair Phoebe Kerby - Secretary Cynthia Koenig-Daggs Kim Hauer Doug Robertson Lou Silverberg Krystal Tipton

Our vision

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