

HERE FOR GOOD



COMMUNITY FOUNDATION OF WEST CHESTER/LIBERTY
ANNUAL REPORT 2020




community foundation | the Heart of
WEST CHESTER · LIBERTY | our Community

A NOTE FROM THE PRESIDENT & CEO

It is easy to focus on the difficulties of 2020, but if you look closely there were moments of hope, as well. We pulled together – families, communities, businesses, and nonprofits – to adapt and to help those most impacted by our shared crisis. While we encountered new challenges, we also uncovered new strengths.

At the Community Foundation, we witnessed an outpouring of generosity from our donors and community partners in response to the increased needs of local nonprofits during the pandemic. As gifts of all sizes came in from across the community, we were reminded of our essential role in connecting resources to needs. We quickly pooled those dollars, and distributed funds where they were needed most in West Chester and Liberty Townships.

Even before the pandemic, philanthropy was on the rise. Since 2018, the Community Foundation has seen a 40% growth in charitable assets to \$21.1M, with more than half of that increase coming last year alone. Those who are able to give have been more charitable than ever, and the Community Foundation is here to help transform their generosity into impact for the causes they care about and for the communities we serve.

Moving into 2021, the Community Foundation of West Chester/Liberty is well-positioned for the future. There are some exciting changes for the Foundation coming this summer that will help us better serve our donors and the entire northern Cincinnati region. We look forward to our next chapter and the good we can do, together.

Erin Clemons

ERIN CLEMONS

President & CEO



OUR MISSION

Transforming generosity into impact by encouraging, supporting, and facilitating philanthropy to create a more vibrant community in West Chester & Liberty Townships.



OUR VISION

Community We enhance the lives of our neighbors by building effective relationships and connecting donors with community needs.

Stewardship We operate with integrity, transparency, and accountability.

Impact We are a dynamic force for facilitating positive and sustainable outcomes.

HERE FOR EMERGENCY NEEDS

COMMUNITY HEALTH FUND

The Community Health Fund was created on March 12th, the same day we announced the cancellation of the 2020 Shamrock Shuffle, as the first fund in the region established to address pandemic-related needs. Foundation staff reached out to event sponsors and participants, offering full refunds but with the promise that should they decline reimbursement, their money would be redirected to support grants for local organizations serving those impacted by the growing crisis. In a shining display of the Shamrock Shuffle's mission - race together, raise together - more than 95% of participants and sponsors declined a refund. Thanks to their incredible generosity, and the generosity of dozens of other individuals and businesses, the Community Health Fund raised \$85,900 in less than 30 days. Those funds were distributed in rapid-response grants to 12 organizations serving West Chester and Liberty Townships as we navigated the early days of the pandemic together.



American Legion Post 681
Atrium Medical Center Foundation
Boys & Girls Club of West Chester/Liberty
East Butler County YMCA
Forever King, Inc.
Lakota Robotics
National Alliance on Mental Illness
Ohio Restaurant Association Education Foundation
Pink Ribbon Girls
Reach Out Lakota
St. Vincent DePaul Hamilton District
The Christ Hospital Foundation
UC Health - West Chester Hospital



\$43,000
FOOD & HOUSING



\$13,700
CHILDCARE



\$29,200
HEALTHCARE

THANK YOU FOR SUPPORTING THE COMMUNITY HEALTH FUND

AK Steel Foundation
Mr. Chris Altwies
Mr. and Mrs. Martin Baxter
Mr. and Mrs. David Boyko
Ms. Mary L. Brophy
Coldwell Banker/West Shell
Realtors West Chester
Mr. and Mrs. Timothy Conway
CTI Restaurants
Ms. Marty Davis
Mrs. Donna Denning
Dingle House
First Financial Bank
Frost, Brown, Todd LLC
The GE Foundation
Mr. and Mrs. Jonathan Granville
Ms. Angela Grimm
Ms. Sandra Hans
Mr. and Mrs. Andrew Harris
Ms. Janet Hazelbeck
Mr. and Mrs. Gage Hemmelgarn
Mr. and Mrs. Gene Hendel
Mr. John Hudson
Humphreys Family Fund
Interim Healthcare
Key Bank
Kingsgate Logistics
Mr. and Mrs. Tom S. Koenig
Mr. and Mrs. Norman Leary

Mr. Joseph LeVay and Mrs. Helen
Fanz Levay
Ms. Heather Mann
Ms. Lynn McClure
Ms. Cynthia Michels
Ms. Anna Morse
Mr. Tim Mueller
Park National Bank
Mr. and Mrs. Jim Paxton
Performance Honda
Mr. and Mrs. Bob Perry
Mr. and Mrs. Seth Priestle
Primrose School
Promospark
Mr. and Mrs. Terrance Raulin
RiskSOURCE Clark-Theders
Insurance Agency Fund
Ms. Teri Ross
Schmidt Family Fund
Mr. and Mrs. James Seelenbinder
Total Wealth Planning
Mr. and Mrs. Bill Trau
Tri-County Heating & Cooling
UC Health West Chester Hospital
UCBMA Fund
West Chester & Liberty Lifestyle
Magazine
Mr. and Mrs. Todd Wilber
Mr. Ted Wilson



A special thank you...

to the 2020 Shamrock Shuffle registrants who
donated their race fee to the Community Health Fund.



HERE FOR FUTURE GENERATIONS

LEAVING A LEGACY

The Legacy Society at the Community Foundation of West Chester/Liberty honors donors who have committed to supporting the community forever through a charitable gift in their estate plan. These gifts provide ongoing funding for causes specified by the donor, while helping to ensure the Community Foundation will be here to meet future community needs and serve the next generation of philanthropists. Partnering with the Community Foundation to create your charitable legacy is as simple as naming us as a beneficiary in your estate plan.



“Find something that connects with your heart. A legacy gift was a way for us to continue giving long after we are gone. We trust the foundation 100% to ensure our funds are properly allocated to kids and families at Cincinnati Children’s Hospital and Cincinnati’s Ronald McDonald House.
– **Mark & Sarah Johnston, Founders - Free Throws for Kids**”

LEGACY SOCIETY MEMBERS

Brent & Sara Arter

Sherry Baker

Dan & Donna Benhase

Chad & Erin Clemons

David Bruno & Margy Conditt

Marty Davis

Christine Humphreys*

Susan Kromer Hunt

Kurt Jacobsen

Mark & Sarah Johnston

Margo Moats

Bill & Marilyn Richardson

Ken Rieser

Bill & Lynne Schumacker

Julie Shaw

William Shepherd

Bill & Tanya Zerkle

**deceased*

A NEW HOME FOR THE COMMUNITY FOUNDATION

This past November, the Community Foundation moved into a new office in an historic Olde West Chester property. The purchase of our forever home marks an exciting milestone, underscoring our commitment to creating a sustainable Foundation to serve the community for years to come.

A special thank you to Marc Henn of Harvest Financial, and the leadership team at Park National Bank, for their generosity in helping us achieve this goal, as well to the dozens of community partners who supported our move.



COMMUNITY FOUNDATION BY THE NUMBERS

THE COMMUNITY FOUNDATION OF WEST CHESTER/LIBERTY

Statements of Financial Position

December 31, 2020 and 2019

ASSETS

	<u>2020</u>	<u>2019</u>
Cash and cash equivalents	\$ 115,809	\$ 177,156
Pledges receivable, net	73,606	56,211
Investments	20,663,971	17,514,649
Property and equipment, net	<u>253,708</u>	<u>-</u>
Total assets	<u>\$ 21,107,094</u>	<u>\$ 17,748,016</u>

LIABILITIES AND NET ASSETS

Net assets		
Without donor restrictions		
Undesignated	\$ 369,517	\$ 177,156
Board designated endowments	<u>20,663,971</u>	<u>17,514,649</u>
	21,033,488	17,691,805
With donor restrictions	<u>\$ 73,606</u>	<u>\$ 56,211</u>
	<u>21,107,094</u>	<u>17,748,016</u>
	<u>\$ 21,107,094</u>	<u>\$ 17,748,016</u>

2020 Independent Audit performed by MCM CPAs & Advisors. For full audit information, please contact the Community Foundation office. The Community Foundation of West Chester/Liberty is pleased to work with our Investment Managers: Harvest Financial Advisors, Park National Bank, Total Wealth Planning, and PNC Bank.

HERE FOR THE GOOD WE DO TOGETHER

GIVING WITH THE FOUNDATION

Since 1999, Community Foundation of West Chester/Liberty has been here to help philanthropic-minded individuals and businesses make the most their charitable dollars. Flexible gift options can be tailored to meet your giving goals and financial needs, charting your personal path to philanthropy. Your gift will support the causes and organizations you choose - from food pantries and homeless outreach, to school programs and animal shelters - and will help the Foundation positively impact the communities we serve.

ESTABLISHING YOUR FUND

- Begin with a minimum gift of \$5,000 (\$25,000 for scholarship funds) and determine the right type of fund for your goals.
- Donations of cash, retirement funds, life insurance, stock, or other assets can be given immediately and over time to build your charitable fund and maximize tax-benefits for you.
- Endowed funds are prudently invested for growth so the impact of your gift will multiply over time.



“Philanthropy is about fairness. We could drive nicer cars, live in bigger houses, and take bigger vacations or we can live within our means, have a little extra, and help those who are trying to help themselves.”

Mark & Julie Dunaway

Dunaway Family Scholarship Fund

“Giving through the Community Foundation allowed us the flexibility to target the organizations we want to support - Down Syndrome Association, Ken Anderson Alliance - while taking advantage of the Foundation's philanthropic expertise.”

Bill & Jenny McCloy

The McCloy Family Foundation, donor advised fund



COMMUNITY FOUNDATION CHARITABLE FUNDS



Last year, Community Foundation donors awarded **\$1.7M in grants** from their charitable funds to thousands of causes and organizations important to them.

Indicates a new fund established in 2020.

8 Paws Charitable Fund
AGAPE Benevolent Fund
AGAPE Legacy Fund
Dr. Masood and Shakila Ahmad
Scholarship Fund
AK Steel Charitable Fund
Dick & Patti Alderson Family Fund
Allen Park Fund
Angel Fund Endowment
Arter Legacy Fund
Ashley's Fund
AstraZeneca Charitable Fund
Atrium Medical Center Fund for
Community Health & Wellness
Kyle Babcock Scholarship Fund
BAE Systems, Inc. Fund
Sherry Baker Charitable Fund
Butler County Republican Women's
Club Scholarship Fund
Beckham Family Foundation
Janet Benhase Memorial Scholarship Fund
Boys & Girls Club of West Chester/Liberty
Bicycle Recycle Fund
Ann and Arthur W. Bidwell Fund
Douglas Brueshaber Memorial Fund
Brueshaber Family Fund
Julia Ellen Burnett Scholarship Fund
Edmund C. Carey Scholarship Fund
Carnahan Family Fund
Cephalofair Games Fund
RiskSOURCE Clark-Theders Insurance
Agency Fund
Community Grants Fund
Community Health Fund
Community Foundation Scholarship Fund

Davis-Wendell Family Fund
Jordan Day Scholarship Fund
Linda Marie Degenhart Forevermore Fund
Deluse Family Fund
Robert & Gretchen Dinerman Charitable Fund
George & Marion Dorin Fund for the Blind
Harold Draut Scholarship Fund
Dunaway Family Fund
Dunaway Family Scholarship Fund
Thomas Dunlap Scholarship Fund
Eastside Angels Fund
Julie A. & Robert W. Elberfeld Charitable Fund
Jeremy Eller Memorial Fund for
International Study
Fabian Family Charitable Fund
Family Promise of Butler County Fund
Ben Feazel Memorial Scholarship Fund
Flynn and Company Inc. Fund
Forever Fund Operating Endowment
Fund 6800 Surviving & Thriving Scholarship
Gilliam Family Fund
GIVE HOPE Pancreatic Cancer Research
& Awareness Fund
GMZ, Inc. Fund
Haglage Construction Fund
Susan C. Hendel Scholarship Fund
Heroes Fund Endowment
Hoody Memorial Scholarship Fund
Humphreys Family Fund
Huntington Bank Fund
Izaak Walton League Cincinnati Fund
Jag's Mise en Place Scholarship Fund
Jess's Fund
Craig Jones Memorial Scholarship Fund
Julia's Angel Fund

Kids2Kamp Fund
Ken Anderson Alliance Fund
Kleingers Group, Inc. Fund
Kromer-Pavlech-Hunt Family Fund
Warren & Patricia Lambeck
Charitable Fund
Alicia Esther Lang Memorial
Scholarship Fund
Lakota Athletic Participation Fee Fund
Bob & LewAnn Lawhorn Scholarship Fund
Marvin R. Lawson Scholarship Fund
Leadership 21 Simply Serves Fund
Greg Lemmel Scholarship Fund
Rob & Debbie Lemmons Charitable Fund
Leo Johnson Memorial Fund
Lakota F.I.E.L.D.S Fund
Lakota Fund
Liberty Center Foundation Fund
Dudley Memorial Park Fund
Liberty Township Charitable Fund
Liberty Township Parks Fund
LIFT Fund
Linkinnati Community Fund
Lakota Schools Foundation
McCloy Family Foundation
Mercedes Benz of West Chester Fund
Mital Family Fund
Karen Moeller Memorial Scholarship Fund
Greg & Janet Morgan Scholarship Fund
Mother Teresa Catholic Elementary
School Endowment Fund
Nixon-Peters Family Fund
One Way Farm Children's Home Fund
Harold and Glenda Painter Charitable Fund
PARACHUTE: Butler County CASA Fund

COMMUNITY FOUNDATION CHARITABLE FUNDS

Logan Pence Memorial Scholarship Fund
Pete's List of Excellence Scholarship Fund
Planes Moving and Storage Fund
Power of the Purse Fund
Kristin Renneker Scholarship Fund
William and Marilyn Richardson Charitable Fund
Reach Out Lakota Fund
Ron & Teresa Rosenbeck Family Fund
Rotary Club of West Chester Liberty Fund
Art & Dorothy Roth Family Fund
Patrick W. Ryan Fund
Sassy's Friends Fund
Schmidt Family Fund
Schramm Family Fund
Schumacher Dugan Fund
Supports to Encourage Low-Income Families (S.E.L.F) Fund
Shamrock Shuffle Fund
Shiver Security Systems, Inc. Fund
Jessica Ann Siegel Scholarship Fund
Rob & Maelyn Siegmann Fund
Skidmore Sales & Distributing Co. Fund
Shayna Smith Scholarship Fund
Zach Smith Memorial Fund
Sosna Family Fund
Dana Spangler Scholarship Fund
Square at Union Centre Fund
Howard & Judith Stalford Charitable Fund
Greg & Diane Stamp Family Fund
William A. & LaVerne R. Stautberg Endowment Fund
Greg and Diane Stevens Fund
Stock Family Fund
Matthew J. Stratman Scholarship Fund
3 little Halos Fund
Tide Cleaners Scholarship Fund
William & Lynn Trau Family Fund
Troy's Cafe Community Fund
Total Wealth Planning Charitable Fund
Union Centre Business Merchant Association Fund
United Group Services Fund
Butler County United Way Legacy Fund
Mark Vaccariello Memorial Scholarship Fund
Jennifer Verkamp Charitable Fund
Mark A. Valentine Memorial Dock Fund

National Voice of America Museum of Broadcasting Fund
Voice of America MetroPark Fund
Robert J. Walsh Exceptional Student Scholarship Fund
Robert C. Wasson Memorial Fund
West Chester Baseball Complex Fund
West Chester Citizen Police Academy Alumni Association Fund
West Chester Parks Fund
West Chester Township Senior Van Transportation Fund
West Chester-Union Township Historical Society Building Fund
Anita & V. Philip Weeda Foundation
Wellspring Community Foundation Fund
F & J White Charitable Fund
David & Dina Wilder Fund
Winterman Family Fund
Wipperman Family Fund
Woodmansee Cemetery Fund
Youth in Philanthropy Fund
Thomas & Kathryn Youket Fund
Ezekiel "Zeke" Stepaniak Memorial Scholarship Fund
Tom & Judy Zenge Fund



TIDE CLEANERS SCHOLARSHIP FUND

Local Tide Cleaners franchisees, Ray & Marilyn D'Alonzo, established the Tide Cleaners Scholarship Fund to support hardworking Butler County high school seniors who balance successful academics and part-time work.



LEADERSHIP 21 SIMPLY SERVES FUND

The West Chester Liberty Chamber Alliance Leadership 21 Class of 2020 created the *Leadership 21 Simply Serves Fund* for future Leadership classes to build and support local nonprofits. Their first grant was awarded to Lakota Local Schools.

HERE TO MAKE AN IMPACT

COMMUNITY FOUNDATION SCHOLARSHIP AWARDS

In 2020, Community Foundation scholarship funds awarded more than \$80,000 to students seeking to further their education.

Alicia Esther Lang Memorial Scholarship
Jessica Tachie - Lakota West

Bob & Lew Ann Lawhorn Education Fund
Sydney Ryan - Norwood

Community Foundation of West Chester/Liberty
Matthew Cummings - Moeller
Jessica Tachie - Lakota West

Dana Spangler Scholarship
Grace Honigford - Lakota East

Dr. Masood and Shakila Ahmad Scholarship
Ashka Shah - Mason

Dunaway Family Scholarship Fund
Isabel Reisbord - Mason

Ezekiel 'Zeke' Stepaniak Scholarship Fund
Jake Gerding - Lakota West

Fund 6800 Surviving & Thriving
Lyndsey Cornish - Lakota West
Gavin Myers - Lakota East
Jessica Tachie - Lakota West

Greg Lemmel Scholarship
Jake Yingling - St. Susanna

Harold Draut Scholarship
Lauren Rader - Lakota East

Hoody Memorial Scholarship
Gavin Myers - Lakota East

Jordan Day Scholarship
Brock Aten - Lakota East
Grace Honigford - Lakota East

Julia Ellen Burnett Scholarship
Lauren Rader - Lakota East

Karen Moeller Memorial Scholarship
Madelyn Barone - Lakota East
Olivia Beebe - Lakota West
Tate Fishman - Lakota West
Grace Honigford - Lakota East
Vincent Kornau - Lakota East
Regan Meyer - Lakota West
Abbey Sturgeon - Lakota West

Kristin Renneker Scholarship
Abby Beckham - Lakota East
Corey Weaver - Lakota West

Kyle Babcock Scholarship
Keenan Norton - Fenwick High School

Matthew J. Stratman Scholarship - Football
Ben Martin - Lakota West

Matthew J. Stratman Scholarship - Lacrosse
Ben Allen - Lakota West

Pete's List of Excellence Scholarship
Ellie Leisten - Lakota East
Abby Hines - Monroe

Robert J Walsh Exceptional Student Scholarship
Nailah Jackson - Lakota West



HERE TO MAKE AN IMPACT

COMMUNITY FOUNDATION GRANTS

The Community Foundation awards grants throughout the year from the *Community Grants Fund* in the areas of education, transportation, and workforce development to nonprofit organizations serving West Chester and Liberty Townships. Grants from our Power of the Purse Women's Giving Circle, Youth in Philanthropy Fund, and Christine Humphreys Fund are also awarded annually to support project and programs in our community.



COMMUNITY GRANTS FUND

EDGE Teen Center - \$20,000

Faith Alliance of SW Ohio - \$5,000

Junior Achievement of OKI Partners - \$5,000



POWER OF THE PURSE WOMEN'S GIVING CIRCLE

EDGE Teen Center - \$10,000

The Power of the Purse Fund is a women's giving circle dedicated to strengthening the community by providing grant funds to non-profit organizations serving the interests of women & children in West Chester and Liberty Townships. Members of POP work to educate and inspire others, and promote philanthropy among women in our community.



YOUTH IN PHILANTHROPY FUND

Reach Out Lakota - \$1,000

Big Brothers Big Sisters of Butler County - \$500

Youth in Philanthropy introduces local high school students to philanthropy by providing hands-on experience. Students work in the community to raise money, build endowment funds, and make grants to non-profit organizations



CHRISTINE HUMPHREYS IMPACT GRANT

Homeless Animal Rescue Team - \$15,000

The Christine Humphreys Impact Grant is awarded annually to parks, pets, and quality of life initiatives in West Chester and Liberty Township through a legacy gift left to the Foundation by Ms. Humphreys.

HERE FOR YOU

FOUNDATION STAFF



Erin Clemons
President & CEO



Nancy Fister
Vice President, Finance



Karen Gibbs
**Director of Programs
& Marketing**

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HOW TO REACH US



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Cuni, Ferguson and LeVay, Co., LPA is a boutique law firm conveniently located in Glendale / Woodlawn. The firm specializes in a variety of areas including Corporate, Closely Held Corporations, Limited Liability Companies, and Partnerships; Real Estate; Homeowner Association Law; Planned Unit Development Law; Family Wealth Preservation Planning; Gift Taxation Planning; Special Needs Trusts and Medicaid Planning; Estate and Trust Taxation; and Fiduciary Law. Partner, Helen Fanz LeVay, Esq., has nearly 36 years legal experience in Estate Planning, Probate and Trust Administration, Estate and Trust taxation, Real Estate, Philanthropy and Charitable Giving.



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RICHARD T. FLYNN, CPA
President & CEO

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Flynn & Company, Inc. is a local, certified public accounting and consulting firm that has been serving clients in the Greater Cincinnati, Northern Kentucky and Dayton region for over 25 years. Our Firm is committed to assisting small to mid-size, privately-held businesses, not for profits and individuals in achieving financial success. We specialize in providing the following services to our clients: audit, tax, accounting, outsourced CFO, business advisory, business valuation, mergers and acquisitions.

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BILL SCHUMACKER
Senior Vice President & Trust Officer

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wschumacker@parknationalbank.com
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Park National Bank is a family of community banking teams that deliver an exceptional breadth and depth of resources to individuals and businesses, with a hands-on, personalized approach to service and strong local leadership that invests deeply in the places we live and work. Talk to Bill to learn more about Park National Bank, where you mean more



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JON ANDRE, AND CHRIS ALLEN

513.984.6696
info@twpteam.com
www.twpteam.com

We're honored to serve the donors and the mission of the Community Foundation as a fund manager. Since 1989, we've also served hundreds of local families with objective guidance to reach their goals. We utilize a deep-comprehensive approach and treat clients as more than their portfolio. Our experienced team coordinates advice for: retirement and college plans, tax planning and projections, insurance analysis, and estate and philanthropic guidance.

COMMUNITY FOUNDATION PARTNERS

We are grateful to the following businesses who have supported the Foundation throughout the year as event and operating sponsors. Thank you for your partnership!

- Total Wealth Planning
- Mercy Health
- Tri-County Heating & Cooling
- Harvest Financial
- Park National Bank
- Performance Kings Honda
- Kingsgate Logistics

