CONNECTIONS

Connections make life meaningful; connections to our family, friends, community, and to the causes we care about. At the Community Foundation of West Chester/Liberty one of our fundamental roles is to connect people who care – people like you – to causes that make a difference and are important to you and to our community. We strive to be the best resource for local philanthropy and offer an unparalleled degree of individual service. At a time when nearly everything is done online, we still believe that a personal connection is vitally important.

In the following pages, you will read about connections in the West Chester/Liberty community that are making a positive impact. Our Community Needs Assessment, completed in 2017, was fully implemented last year with 100% of our Community Grants Fund dollars aligning with the identified priorities of education, transportation, and workforce development. The organizations who received grants are moving forward with programming that will enhance the quality of life in our community and connect people with necessary services and new opportunities. Also, in 2018, Community Foundation scholarship funds connected local students to more than $80,000 in funding to help with the rising costs of higher education; and one individual’s charitable legacy is helping provide local residents (and their four-legged friends) a refreshed outdoor space to enjoy.

These connections, and many others, bring life and meaning to the work of the Community Foundation. Thank you for your continued support! Together, we are making a lasting impact by connecting people who care with causes that matter.

IAN MURRAY
Board Chair, 2016-2018

ERIN CLEMONS
President & CEO

MISSION

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

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.

NATIONAL STANDARDS

This public symbol signifies that we follow the rigorous National Standards developed for community foundations in the United States and demonstrates our commitment to integrity and excellence.

2018 IMPACT

Community Foundation by the Numbers

$16 MILLION
In Assets

$182,000
Raised at Community Foundation Events

$1.4 MILLION
Granted out from Unrestricted and Donor Funds

$3 MILLION
Total Contributions for 2018

7 LOCAL ORGANIZATIONS
Received Community Grants Fund Support for Education, Transportation, & Workforce Development Initiatives

32 SCHOLARSHIPS
Awarded to Local Students Totaling More than $80,000

71% OF ASSETS ARE ENDOWED,
Building for Future Needs in the Community

BOARD OF DIRECTORS

Ian Murray - Chair
Bill Schumacker - Vice Chair
Tom Zenge - Treasurer
Chris Xeil Lyons - Secretary
Dan Benhase
Jeanne Brauns
Dave Bruno
Ray D’Alonzo
Tom Daskalakis
Nick Enger
Helen Fanz LeVay
Gail Jackson Miller
Tim Kelly
Dr. Chetna Mital
Ray Murray
Seth Priestle

STAFF

Erin Clemons
President & CEO

Nancy Fister
Vice President - Finance

Karen Gibbs
Director of Programs & Marketing

Kate Feldmann
Administrative Assistant
Building a Legacy: The Christine Humphreys Impact Grant

Christine Humphreys was a long-time West Chester resident and valued member of our community. Following her husband’s passing Christine established a Donor Advised Fund at the Community Foundation and began to build a source of charitable dollars that she could distribute over time, while receiving immediate tax benefits. In 2016 Christine approached the Community Foundation to discuss the goals she had for her fund and the impact she wanted to make, ultimately deciding to endow her fund to create a sustainable source of support for parks, pets, and quality of life initiatives in the community. A planned estate gift to her fund ensured her legacy would benefit the community for years to come. Unfortunately, Christine lost her battle with cancer early in 2017. We are honored to have been able to help Christine fulfill her charitable giving goals, and grateful to be able to carry out her legacy in support of the causes close to her heart.

The Christine Humphreys Impact Grant is awarded annually, in perpetuity, by the Foundation’s board of directors to support projects and programs in West Chester and Liberty Township that align with Christine’s philanthropic goals.

2018 CHRISTINE HUMPHREYS’S IMPACT GRANT

The first Christine Humphreys Impact Grant was awarded in 2018 to Friends of MetroParks for repairs and improvements to the Wiggly Field Dog Park at Voice of America MetroPark in West Chester. The $40,000 grant helped complete improvements to the space including repairs to drainage systems and fencing. Once complete, these improvements will enhance the overall experience for visitors, minimize the number of closures due to wet weather and ground conditions, and allow MetroParks to cycle usage of separate areas to allow for regeneration of turf after wear and tear.

Thank you for your generous donation to the ongoing enhancements at Wiggly Field Dog Park. The funds that you have graciously provided have helped all dog owners and park visitors with a better experience and expanded facilities.

– Friends of MetroParks

The families and businesses who have pledged support to the Forever Fund Operating Endowment believe in the mission of the Foundation and the positive impact of local philanthropy. Their donations helped launch the Community Foundation of West Chester/Liberty at a grass-roots level nearly 20 years ago, and continue to secure a sustainable future for the organization.

WHAT WILL YOUR LEGACY BE?

The Community Foundation of West Chester/Liberty can help you build a legacy tailored to meet your charitable giving goals. We will work with you, or your financial or legal advisor, to plan for the future by defining your areas of philanthropic interests and charting a path that maximizes both the impact of your gift and the financial benefit to you and your family. You may choose to give to an existing fund or establish a new fund to support a nonprofit organization or cause close to your heart. Regardless of how you give, your planned gift to the Community Foundation will make an impact for generations to come.
The Shayna Smith Scholarship Fund was established at the Community Foundation in 2015 by Brian and Tywana Smith in memory of their daughter, Shayna Elayne Smith, who passed away unexpectedly on June 24th of that year at just 15 years old. Shayna, whose name means “beautiful light”, was truly a light to those around her. She was a friend to everyone; smart, loving, considerate, athletic and compassionate. As a high honors student at Lakota West High School, she had already made plans to attend Ohio State University to become a veterinarian.

The Shayna Smith Scholarship will keep Shayna’s light shining for years to come by helping Lakota West graduates pursue their dreams. The scholarship is available to students committed to academics, extracurriculars, and community service who plan to pursue a degree in a science field after high school.

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The Community Foundation is proud to help the Smith family carry on Shayna’s legacy through this scholarship in her memory. Scholarship funds can be established for a variety of reasons, from honoring a loved one to promoting a specific field of study, and can benefit students in preschool through post-secondary. Foundation staff work with donors to establish criteria, formulate an application, and manage the process from start to finish.
Your Philanthropic Resource
Establishing a fund at the Community Foundation of West Chester/Liberty is a simple process, customized to meet your charitable giving goals. We provide flexibility, personal service, and administrative management so that you can pursue your philanthropic goals and make a positive impact, without the burden and expense of a private foundation.

PLAN
With the help of foundation staff, consider your charitable giving goals, the impact you want to have on the community, and your corporate or family values.

INVEST
Your charitable dollars are prudently invested for long-term growth, overseen by a professional investment advisory firm and a committee of local professionals.

GIVE
A business, organization, family, or individual makes a tax-deductible gift to the community foundation to establish a charitable fund dedicated to the causes they care about most.

ENGAGE
Foundation staff will help you identify nonprofit organizations and programs that align with your charitable giving goals, create a positive impact in the community, and establish your legacy of giving.

Organizations your fund supports help create…
A stronger, more vibrant community for everyone!

NEW DONOR FUNDS
3 little Halos Safety Town Fund
Robert J. Walsh Exceptional Student Scholarship Fund

Dunaway Family Fund
West Chester-Union Township Historical Society Building Fund

COMMUNITY FOUNDATION OF WEST CHESTER/LIBERTY FUNDS
3 little Halos Fund
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
Caring Like Angels and Heroes - Angel Fund Endowment
Anthony's Army Fund
Arter Legacy Fund
Ashley's Fund
AstraZeneca Charitable Fund
Atrium Medical Center Fund for Community Health & Wellness Fund
Kyle Babcock Scholarship Fund
BAE Systems, Inc. Fund
Butler County Republican Women's Club Scholarship Fund
Beckham Family Foundation
Janet Benhase Memorial Scholarship Fund
Boys & Girls Club of West Chester/Liberty Fund
Bicycle Recycle Fund
John Boehner Education Fund
Douglas Brueshaber Memorial Fund
Brueshaber Family Fund
Julia Ellen Burnett Scholarship Fund
Edmund C. Carey Scholarship Fund

GMZ, Inc. Fund
Haglage Construction Fund
Susan C. Hendel Scholarship Fund
Caring Like Angels and Heroes - Heroes’ Fund Endowment
Hoody Memorial Scholarship Fund
Humphreys Family Fund
Huntington Bank Fund
Izaak Walton League, Cincinnati Chapter Fund
Jag's Mis 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-Pavlich-Hunt Family Fund
Kyle's Fund to benefit St. Peter and Paul Academy of Reading, OH
Warren and Patricia Lambeck Charitable Fund
Alicia Esther Lang Memorial Scholarship Fund
Lakota Athletic Participation Fee Fund
Bob Lawhorn Education Fund
Marvin R. Lawson Scholarship Fund
Greg Lemmel Scholarship Fund
Rob and Debbie Lemmons Charitable Fund
Leo Johnson Memorial Fund
Lakota East Spark Fund
Lakota F.I.E.L.D.S Fund
Lakota Fund
Liberty Center Foundation Fund
Liberty Township Charitable Fund
Liberty Township Parks Fund
LIFT Fund
Lilian’s Legacy Fund
Linkinatti Community Fund
Lakota Robotics Fund
Lakota Schools Foundation
McCloy Family Foundation
Mercedes Benz of West Chester Fund
Leadership 21 Class of 2016 Fund
Mital Family Fund
Karen Moeller Memorial Scholarship Fund
Greg and 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
Logan Pence Memorial Scholarship Fund
Pete’s List of Excellence Scholarship Fund
Pets Helping People 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 and Teresa Rosenbeck Family Fund
Rotary Club of West Chester Liberty Fund
Art and Dorothy Roth Family Fund
Rotary Club Water Project Fund
Stanley D. Rullman Fund
Patrick W. Ryan Fund
Sassy’s Friends Fund
Schramm Family Fund
Schumacher Dugan Fund
Supports to Encourage Low-Income Families Fund
Shiver Security Systems, Inc. Fund
Jessica Ann Siegel Scholarship Fund
Rob and Maelyn Siegmund Fund
Skidmore Sales & Distributing Co. Inc. Fund
Shayna Smith Scholarship Fund
Zach Smith Memorial Fund
Vos Smith Family Fund
Dana Spangler Memorial Scholarship Fund
Square at Union Centre Fund
Howard and Judith Staford Charitable Fund
Greg and Diane Stamp Family Fund
William A. and LaVerne R. Stautberg Endowment
Greg and Diane Stevens Fund
Stock Family Fund
Total Wealth Planning Charitable Fund
Union Centre Business Merchant Association Fund
United Group Services Fund
Butler County United Way Legacy Fund
Mark Vaccanello Memorial Scholarship Fund
Jennifer Verkamp Charitable Fund
Voice of America MetroParks Program Fund
National Voice of America Museum of Broadcasting Fund
Robert C. Wasson Memorial Fund
WC Baseball Complex Sustaining Capital Real Property Fund
West Chester Citizen Police Academy Alumni Association Fund
West Chester Parks Fund
West Chester Rotary Foundation Fund
West Chester Township Senior Van Transportation Fund
Anita and V. Philip Weeda Foundation
F & J White Charitable Fund
Aaron Wietzel Fund
David and Dina Wilder Fund
Winterman Family Fund
Wipperman Family Fund
The Wishing Well Project Fund
Woodmansee Cemetery Fund
Roy H. Yelton Memorial Scholarship Fund
Youth in Philanthropy Fund
Thomas and Kathryn Youket Fund
Ezekiel “Zeke” Stepaniak Memorial Scholarship Fund
Tom and Judy Zenge Fund
Patricia F. Alderson Philanthropists of the Year

The Patricia F. Alderson Philanthropist of the Year Award – named in honor of the Community Foundation’s founder – is presented annually to local philanthropists who have shown exceptional dedication to improving the community through gifts of time, talent, and treasure.

LARRY & SANDY BRUESHABER

The Brueshabers have been champions of West Chester and Liberty Township, and the surrounding area, for many years. Their vision helped launch the Community Foundation nearly 20 years ago, and they have been consistent supporters since. Many local nonprofits, including Family Promise, the Boys & Girls Club of West Chester/Liberty, and Cincinnati Children’s Hospital, have benefited from the Brueshaber’s generosity.

TODD & REBECCA WILBER

Todd and Rebecca Wilber, owners of CTI Restaurants, have been steadfast supporters of the Foundation, and of West Chester and Liberty Township, for many years. As a Founding Business, they helped launch the Foundation in its early years, and have helped raise hundreds of thousands of dollars at The Shamrock Shuffle and The Key Event to fund grants to local nonprofits.

Corporate Philanthropists of the Year

The Corporate Philanthropist of the Year Award seeks to recognize an outstanding local business whose dedication to philanthropy is making a difference.

PARK NATIONAL BANK

Park National Bank is an active presence in West Chester/Liberty, supporting many local organizations. Their corporate culture is deeply rooted in the values of service and philanthropy, and Park National Bank associates are encouraged to volunteer locally. Park has been recognized by the Cincinnati USA Regional Chamber with the Community Involvement Award for their outstanding investment of time and resources in giving back to local communities.

KINGSGATE LOGISTICS

Kingsgate Logistics places a high value on community involvement. Their charitable initiative, Kingsgate Gives Back, has supported dozens of local organizations and encourages employees to contribute to the causes they care about. When the second generation took over the family business in 2008, founder Tom Beckham had this piece of advice, “Make sure the taxes are paid, and if you have anything left, give back.”

2018 Fundraising Events

Community Foundation of West Chester Liberty fundraising events – The Key Event and The Shamrock Shuffle – encourage, support, and facilitate philanthropy by providing an opportunity for people to come together in support of a common cause. These events offer avenues to charitable giving accessible to everyone in the community. Proceeds benefit the Foundation and our Community Grants Fund, providing grant support to nonprofit organizations serving West Chester and Liberty Township.

25TH ANNIVERSARY KEY EVENT
SEPTEMBER 8, 2018
TOTAL RAISED: $99,686

13TH ANNUAL SHAMROCK SHUFFLE
MARCH 9, 2018
TOTAL RAISED: $82,946
TOTAL GRANTED BACK TO CHARITY TEAMS: $14,580

Community Foundation events provide opportunities for people from all walks of life to give back to the West Chester/Liberty community.
Boys & Girls Club of West Chester/Liberty – Club Learning Center
$15,000

The Boys & Girls Club of West Chester/Liberty serves local students in grades 2 through 12 by offering tested, proven and nationally recognized after-school and summer programs that provide youth with the knowledge, skills and attributes they need to pursue their dreams and succeed in adulthood. The Club was awarded a grant from the Community Foundation to sustain the Club Learning Center and expand Learning Center offerings to serve more students. The Learning Center, staffed by highly qualified teachers, enables students to develop the competencies and skills necessary to be competitive academically, while empowering them to be confident that they can achieve their goals. Students receive individual attention, and Learning Center Staff work with Lakota teachers and families to develop strategies to help kids overcome specific academic challenges.

EDGE Teen Center – Community Service Van
$30,000

EDGE Teen Center provides high school students with a diverse, youth-driven teen center dedicated to creating mentoring relationships with caring adults through community service opportunities, social activities, tutoring, counseling, and life skills courses. A grant from the Community Foundation provided for the purchase of a new 15-passenger van for the EDGE Community Service Program, to replace an existing 20-year-old vehicle. The program offers service opportunities to 400 teens at 15+ area organizations. In 2017 they provided 1500 round trips that allowed students to perform more than 4,000 hours of service. Transportation to and from service sites is provided free of charge for students.

Supports to Encourage Low-Income Families – Employer Resource Network
$16,264

Supports to Encourage Low-income Families (SELF) is a Butler County nonprofit organization that helps low-income residents achieve and maintain self-sufficiency. The Community Foundation awarded SELF a grant to establish Butler County’s first Employer Resource Network (ERN). An ERN is a workforce retention and skills-building program which is driven by area employers. The employers “job share” a coach who works on-site at each employer’s location to work with their respective employees for skill-building, resource development and/or to assist employees in barrier removal. Employers receive company-specific feedback on employee issues on a regular basis as well as roll-up reports for all employers in the Network. The Network then meets on a regular basis to discuss employee progress, development topics and to share resources that are available.

In spring 2017 the Community Foundation of West Chester/Liberty completed a comprehensive, data driven Community Needs Assessment with Ignite Philanthropy. The 9-month long project included a Community Summit as well as interviews with representatives across a variety of sectors in the community. The report identified 3 key areas of focus where philanthropy can make a significant impact: education, transportation, and workforce development. Over the next 5-10 years, we plan to build initiatives around the results of the needs assessment, create collaborative partnerships with local nonprofit organizations, government, and businesses, and direct our grant-making to fund programming in these primary areas. 2018 was the first year the Foundation directed grant making from the Community Grants Fund around these areas of need.
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RICHARD T. FLYNN, CPA
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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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Cuni, Ferguson and LeVay, Co., LPA is a boutique law firm conveniently located in Glendale / Woodlawn. The firm specializes in Corporate, Closely Held Corporations, Limited Liability Companies, and Partnerships; Real Estate; Community, Homeowner Association and Condominium Association Law; Planned Unit Development Law; Estate Planning; Probate and Ancillary Probate Administration; Probate Avoidance Planning; Family Wealth Preservation Planning; Gift Taxation Planning; Special Needs Trusts and Medicaid Planning; Estate and Trust Taxation; Fiduciary Law; Philanthropy; and, Charitable Giving. Partner, Helen Fanz LeVay, Esq., has nearly 35 years legal experience focusing on Estate Planning, Probate and Trust Administration, Estate and Trust taxation, Real Estate, Philanthropy and Charitable Giving.

PARK NATIONAL BANK
BILL SCHUMACKER
Senior Vice President and Trust Officer
513.718.6053  |  wschumacker@parknationalbank.com
www.parknationalbank.com
Bill Schumacker is Senior Vice President and Trust Officer for Park National Bank. Bill’s knowledge and 40 years of banking experience make him a valuable advisor when investing for your retirement or planning your estate. Bill has a Bachelor’s Degree in Business Administration & Finance from Butler University, and is a graduate of the American Banker’s Association National Trust School. He has served as a member of the Community Foundation’s board of directors since 2012, and is currently serving as Board Chair. He also serves on the West Chester Township Development Council Board and is a past president of West Chester/Liberty Rotary Club where he received the Paul Harris Fellow and Patty Daughtery Service Awards.

FIRST FINANCIAL BANK
CHRIS MOTLEY
Market President – Butler/Warren Counties
www.bankatfirst.com
For over 150 years, First Financial Bank has successfully combined the expertise and services of a larger bank with the care and perspective of a neighborhood community bank. First Financial has grown from its roots in nearby Hamilton, Ohio to become the second largest bank holding company headquartered in Greater Cincinnati with assets of $7 billion.

Although the bank continues to experience exciting growth, the mission of the bank remains the same. First Financial has and always will be a client-centered and relationship-focused bank that builds strong partnerships with its clients, local business and the community. First Financial proudly supports the Community Foundation of West Chester/Liberty to help improve the quality of life in the region.

TOTAL WEALTH PLANNING
DAVE WILDER, JOEL MUSSER, ROB LEMMONS, ROB SIEGMANN, JON ANDRE, AND CHRIS ALLEN
513.984.6696  |  info@twpteam.com
www.twpteam.com
Since 1989, Total Wealth Planning has provided objective guidance and solutions to clients helping them reach their lifetime goals. We utilize a comprehensive wealth planning approach tailored to multi-generational families, business owners and corporate executives. Many financial firms limit relationships to investment advice or commissioned product sales. However, our experienced team of professionals provides value with coordinated planning services such as: retirement and college plans, tax planning and projections, insurance analysis, and estate and philanthropic guidance. We serve client interests first and embrace the fiduciary standard. We’re honored to be an approved charitable fund investment manager and serve the donors and the mission of the Community Foundation.

COMMUNITY FOUNDATION PARTNERS
We are grateful for the generosity and vision of the following sponsors who supported the Community Foundation throughout the year.

PLATINUM
Park National Bank
Total Wealth Planning

SILVER
AstraZeneca
Liberty Center
Tri County Heating & Cooling

BRONZE
Graydon Law
Phelan Insurance
Lifestyle Publications

SPONSORS
Power of the Purse Women’s Giving Circle

The Power of the Purse Women’s Giving Circle is dedicated to strengthening the community by providing grants to non-profit organizations serving the interests of women & girls in West Chester and Liberty Township. Members of Power of the Purse contribute a $100 annual donation and together make a $10,000 grant each year to a local organization. The women of Power of the Purse work to educate and inspire others and promote philanthropy among women in our community.

2018 POWER OF THE PURSE GRANT
PARACHUTE: Butler County CASA - $10,000

Youth in Philanthropy

Youth in Philanthropy (YIP) is a program designed to introduce local high school students to philanthropy and community development. The program provides hands-on experience that benefits both the participating students and local charities. Students work in the community to raise money, build endowment funds, and make grants to non-profit organizations improving the lives of youth in our community. Engaging youth in philanthropy is an opportunity to prepare young people to be active, lifelong community citizens.

2018 YOUTH IN PHILANTHROPY GRANTS
Bicycle Recycle - $3,000
EDGE Teen Center - $2,000