

Looking Ahead

Honoring the past. Celebrating the future.



2019 ANNUAL REPORT

Honoring the past. Celebrating the future.

Twenty years ago, driven by a passion to help others and a desire to improve their community, a small group of West Chester/Liberty residents established the Community Foundation. It was a grass-roots effort, born of their generosity of time, talent, and treasure, and grown through the proceeds from annual fundraisers and the support of local families and businesses. The Foundation reached its first milestone in 2003 when assets surpassed \$1M across 35 charitable funds. Since then our mission to encourage, support, and facilitate philanthropy has resulted in nearly \$18M in grants to nonprofit organizations serving West Chester and Liberty Townships, and to causes important to our donors.

The vision of those founding families twenty years ago laid the groundwork for the growth and impact of the Community Foundation today. During 2019, we saw a \$3M increase in assets to \$17.7M and while those numbers are important, they do not tell the deeper story of our work. That story, in part, is told in the pages of this report. From grants to nonprofit organizations focusing on education, transportation, and workforce development, to a scholarship endowment giving students a head-start, to donors seeking to leave a legacy of support for the community and causes they care about. Perhaps our most important work is what we are doing to build long-term, sustainable assets so that 20 years from now and beyond, the Community Foundation will be here to meet the changing needs in West Chester/Liberty.

Our future is bright, and we are looking forward to the next chapter, beginning with a new, permanent home for the Community Foundation in Olde West Chester. In November 2020, the Community Foundation of West Chester/Liberty will move into the former Harvest Financial building at 8897 Cincinnati Dayton Rd. We owe special thanks to Harvest Financial Advisors for helping ensure the Foundation could purchase the property without taking on the burden of debt, and to Park National Bank for their generosity in leasing us a beautiful office space, rent free, for the past six years.

As we honor the accomplishments of the past and celebrate the possibilities of the future, we remain focused on creating a positive impact in West Chester/Liberty by helping families and businesses share in the joy of philanthropy. Thank you – our donors, sponsors, community partners, and volunteers – for your continued support. We look forward to what we will accomplish together over the next 20 years.



Erin Clemons
President & CEO



Bill Schumacker
Board Chair, 2018-2020

1999

Celebrating 20 Years

2019



Early Community Foundation supporters gather for a Christmas celebration in 2000.



Community members and the West Chester/Liberty Chamber Alliance joined us to celebrate the Foundation's 20th anniversary with a ribbon cutting at our 2019 Annual Open House.



The Community Foundation will move into our new location at 8897 Cincinnati Dayton Rd. in November 2020.

MISSION

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

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.

Making an Impact in West Chester and Liberty Townships

The Community Foundation of West Chester/Liberty awards grants throughout the year in the areas of education, transportation, and workforce development to nonprofit organizations serving West Chester and Liberty Townships.

EDUCATION

JUNIOR ACHIEVEMENT OF OKI PARTNERS – \$10,000
Programming in Lakota Schools

CITY GOSPEL MISSION – \$13,500
Whiz Kids Tutoring & Mentoring

LAKOTA JUNIOR HIGH SCHOOLS – \$8,400
The ID Project

TRANSPORTATION

VOICE OF AMERICA MUSEUM OF BROADCASTING – \$24,000
Voice of America MetroPark Museum Connector

FAMILY PROMISE OF BUTLER COUNTRY – \$6,000
Family Transportation Needs

WORKFORCE DEVELOPMENT

BOYS & GIRLS CLUB OF WEST CHESTER/LIBERTY – \$19,600
Teen Leadership & Workforce Readiness

LAKOTA ROBOTICS – \$15,000
STEAM Jobs & Life Skills Programming



Plans for the Voice of America Museum Connector Path, funded by a Community Foundation Transportation Grant for walkability, show easy access for visitors of the VOA Museum and the VOA MetroPark Athletic Complex. The crushed stone path cuts an easy 650-foot walk between the sites, eliminating the once 2.5 mile drive.



City Gospel Mission's Whiz Kids is a literacy-based, one-to-one tutoring and mentoring program offered at 3 sites in West Chester/Liberty: Cherokee, Independence, and Woodland Elementary Schools.



Lakota Robotics Team 1038 is presented with a grant check by Foundation Vice Chair, Dave Bruno, to support their exploration of STEAM careers.



Family Promise of Butler County provides shelter, meals, and support services for homeless families in Butler County. Their program offers help with job searches, skills assessments, financial literacy, and transportation needs all critical elements to lifting a family out of poverty. (photo credit JournalNews)



Boys & Girls Club of West Chester/Liberty Teen Leadership & Workforce Readiness participants pause for a photo-op and grant presentation with Club Leadership, Dale Kozma and Patti Alderson, and Foundation CEO, Erin Clemons.

Paying it Forward

DAVE BRUNO AND MARGY CONDITT

When asked about their motivation to give back, Dave Bruno and his wife Margy Conditt answer, nearly simultaneously, “God has blessed us.”



Growing up in Eastern Ohio at the foothills of the Appalachian Mountains, Dave could scarcely have imagined the path his life would take. But his father’s advice to “strive for excellence in everything you do” propelled Dave to success as the first in his family to graduate college, and on to a career as an engineer at Procter & Gamble where he met Margy, a PhD Chemist. Their careers at Procter provided incredible opportunity and allowed Dave & Margy to build for their family’s future.

In 1989 they put down roots in Liberty Township and over the years became involved in the community as active parents, and by volunteering with local organizations and township government. Now in their retirement years, that commitment to helping out has not waned for Dave and Margy, but it looks a bit different.

“After so many years of being active in the community, the question became how do we continue to make an impact in this later phase of life?” says Dave. “We have been blessed financially; and it made sense to support the causes we care about by giving back in that way.”

Dave and Margy included a Legacy Gift to the Community Foundation of West Chester/Liberty in their estate plan to ensure their support for the community and the causes they care about would continue in perpetuity. Giving through the Community Foundation allowed them the opportunity to be diverse, flexible, and efficient with their philanthropy while taking advantage of the Foundation’s unique expertise of the local charitable landscape.

Dave Bruno and Margy Conditt hope their impact might be a catalyst for others to pay it forward and in so doing change the trajectory of a family tree, an organization, or even a community.

“If we can make an impact and change even one life through our giving, just think about the difference that can make for multiple 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. Joining the Legacy Society is a simple way to make a difference for future generations, and for the causes you care about.

LEGACY SOCIETY MEMBERS

Brent & Sara Arter	Marty Davis	Ken Rieser
Sherry Baker	Christine Humphreys*	Bill & Lynne Schumacker
Dan & Donna Benhase	Susan Kromer Hunt	Julie Shaw
Chad & Erin Clemons	Kurt Jacobsen	William Shepherd
David Bruno & Margaret Conditt	Margo Moats	Bill & Tanya Zerkle
	Bill & Marilyn Richardson	<i>*Deceased</i>

LEGACY GIFT CREATES ANNUAL IMPACT GRANT

Christine Humphrey's Legacy Gift is making an impact in West Chester and Liberty Townships for parks, pets, and quality of life initiatives – the causes she cared about most during her lifetime. In 2019, the Community Foundation awarded the Christine Humphreys Impact Grant to Cancer Family Care for their Coping Connections program serving cancer patients and their families. The first Christine Humphreys Impact Grant, awarded in 2018 to Friends of MetroParks of Butler County, funded improvements to the Wiggly Field Dog Park at Voice of America MetroPark.



Cancer Family Care client, Beth Steur, and her husband shared their experience with the Coping Connections Hotline at CFC's Annual Gala in November.



Community Foundation Board Chair, Bill Schumacker, represented the Foundation at the ribbon-cutting ceremony for Wiggly Field Dog Park in 2019.



PHILANTHROPIST AWARDS

The 2019 Patricia F. Alderson Philanthropist of the Year Award was presented to Mr. and Mrs. Red & Jo Deluse. The Deluses have been champions of the West Chester/Liberty community, and the surrounding area, for many years. As a

Founding Family, their support helped launch the Community Foundation 20 years ago and they have generously, and quietly, provided for many impactful programs since. Kids2Kamp, funded almost entirely by Mr. & Mrs. Deluse, has granted more than \$320,000 since 2004 to send 2300 local kids to summer camp. The Lakota Athletic Participation Fee Assistance Fund, established by the Deluses in 2011, has helped hundreds of families afford to have their children participate in school sports granting nearly \$70,000 in athletic participation fee scholarships.

The 2019 Corporate Philanthropist of the Year Award was presented to Andy French of Performance Auto Group (subsidiaries, Performance Toyota and Performance Kings Honda). Performance has been a significant supporter of the Community Foundation through annual event sponsorships. Their generosity has helped us raise nearly \$200,000 each year to support community grants and the overall mission of the Community Foundation to encourage, support, and facilitate philanthropy.



POWER OF THE PURSE WOMEN'S GIVING CIRCLE

Power of the Purse Women's Giving Circle members awarded their annual \$10,000 grant to Sleep in Heavenly Peace, a national nonprofit organization with local chapters whose mission is to ensure all children have a safe, comfortable place to lay their head at night. Since its establishment in 2005, Power of the Purse has granted more than \$133,000 to organizations serving the interests of women and children in West Chester & Liberty Townships.



YOUTH IN PHILANTHROPY

Youth in Philanthropy (YIP) is a program designed to introduce high school students to local philanthropy. Throughout the year YIP teens create and manage fundraising campaigns and events, volunteer in the community, and learn about the local nonprofit landscape. Each spring, they evaluate funding applications and make grants from the money they have raised to organizations serving youth in the community.



2019 YOUTH IN PHILANTHROPY GRANTS:

Focus on Youth – \$1500

Lakota Hills Baptist Church Kids Club – \$1500

Mojo Endurance Sports Youth Tri Club – \$1500

Reach Out Lakota – \$2000

Underground Zone Ministries – \$500

LAKOTA EDUCATOR OF EXCELLENCE

The Lakota Educator of Excellence Award recognizes educators in the Lakota School District who demonstrate consistency and high commitment to students. These individuals motivate, share ideas, inspire, support, create, and go above and beyond to make a difference in the community. Each award is accompanied by a \$1000 grant for the recipient to use and their school for a special project or program.

2019 LAKOTA EDUCATORS OF EXCELLENCE:

Audrey Young – Freedom Elementary School

Jennifer Dietsch – Ridge Junior School

Andrea Blevins – Endeavor Elementary



SHAMROCK SHUFFLE 5K/10K

The 13th Annual Shamrock Shuffle 5k/10k & Community Block Party raised nearly \$80,000 through the generosity of business sponsors and more than 4,000 event participants. Proceeds benefit the Foundation's Community Grants Fund, as well as 25 Charity Teams registered through the Shuffle Gives Back program.

Investing in the Education of Local Students

**Alicia Ester Lang
Memorial Scholarship**
Trey Saunders

**Dr. Masood & Shakila
Ahmad Scholarship**
Yusuf Shareef

**Bob Lawhorn Education
Fund Scholarship**
Sophie Isaacs

**Community Foundation of West
Chester/Liberty Scholarship**
Courtney Poweless
Kelsey Eck

Dana Spangler Scholarship
Julia Finley

Dunaway Family Scholarship
Sophia Johnson
Hyein Cho

Greg Lemmel Scholarship
Max Plumley

Harold Draut Scholarship
Logan Grimes

Hoody Memorial Scholarship
Samantha Mascara

Jessica Ann Siegel Scholarship
Lisa Biehle

Jordan Day Scholarship
Bree Wilson
Stone Shields
Kyle Schmidt

Julia Ellen Burnett Scholarship
Courtney Poweless

Karen Moeller Scholarship
Lindsey Kluesener
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History & Government Scholarship**
Alex Strack
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Megan Shaffer
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**Robert J Walsh Exceptional
Student Scholarship**
Dylan Newman
Victoria Frank

**Matthew J Stratman
MS6 Scholarship**
Ladonnis Griffin

**Matthew J Stratman
MS27 Scholarship**
Anthony Amsbaugh



Shane Lewis, Bob Lawhorn Education Fund Scholarship recipient

The Bob Lawhorn Education Endowment

“Thank you, I won’t let you down.” That was Shane Lewis’ simple promise to the Lawhorn family as he accepted the Bob Lawhorn Education Fund Scholarship, a four year full-tuition scholarship to the University of Cincinnati awarded annually to a graduate of Bob’s alma mater, Norwood High School. Two years later, Shane has kept that promise. As a first-generation college student, he has defied the odds and finished semester after semester on the Dean’s List while he pursues a business degree at UC’s Lindner College of Business. Shane hopes one day to be a successful business owner, showcasing to others that with hard work and dedication you can achieve anything. Thanks to the Bob Lawhorn Scholarship, Shane will have a head start when he enters the workforce.

“To know that I will graduate with no debt is not only a blessing to me but my family as well,” says Shane. “This will allow me to focus entirely on my new career without the lingering fear of not being able to repay student loans.”

The Bob Lawhorn Education Fund was one of the first scholarship funds established at the Community Foundation in 2005 and remains one of the most impactful. Bob truly valued education and knew the struggle students face in paying for a college education – he had lived it himself, and he experienced it daily at his successful business in the student loan debt industry. Mr. Lawhorn’s legacy and belief in the power of education lives on in the 14 students who have benefited from the scholarship that bears his name. By endowing the fund, Bob’s wife and his family have ensured that his legacy will continue for generations to come.

Financials

The Community Foundation of West Chester/Liberty
Statements of Financial Position
December 31, 2019 and 2018

ASSETS	2019	2018
Cash and cash equivalents	\$ 177,156	\$ 228,681
Pledges receivable, net	56,211	66,110
Contributed rent receivable, net	–	66,000
Investments	17,514,649	14,280,878
Total Assets	\$ 17,748,016	\$ 14,641,669

LIABILITIES AND NET ASSETS

NET ASSETS

Without donor restrictions		
Undesignated	\$ 177,156	\$ 228,681
Board designated endowments	17,514,649	14,280,878
	<u>\$ 17,691,805</u>	<u>\$ 14,509,559</u>
With donor restrictions	56,211	132,110
	<u>17,748,016</u>	<u>14,641,669</u>
	\$ 17,748,016	\$ 14,641,669

2019 Independent Audit performed by MCM CPAs & Advisors.

For full audit information, please contact the Foundation office at 513.874.5450. The Community Foundation of West Chester/Liberty is pleased to work with our Investment Managers: Park National Bank, First Financial Bank, Total Wealth Planning, PNC Bank, and Fifth Third Bank.

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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.



FOUNDATION PARTNERS

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

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



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2019 COMMUNITY FOUNDATION BY THE NUMBERS



**\$17.7
MILLION**
In Total Assets



**\$2.5
MILLION**
In Charitable Contributions



39
SCHOLARSHIPS
Awarded Totaling
\$66,000



**10
NEW
DONOR
FUNDS**
Established



\$1.4 MILLION
Granted from Community
and Donor Funds