



# FOUNDATION FOR APPALACHIAN OHIO

2016  
ANNUAL  
REPORT



FOUNDATION FOR  
APPALACHIAN OHIO

Give. Grow. Create.

January 20, 2017

Dear Friends,

2016 was a momentous year! Because of your gifts, FAO gave more grants in 2016 than in any previous year, investing a record-breaking \$1.5 million in nonprofits, schools, and students. Twenty-one new funds were created and our local philanthropy-building initiatives expanded substantially. This all resulted in a tremendous number of new opportunities for the citizens and communities of Appalachian Ohio.

As we reflect, we realize much of the story about 2016 will be told in future years – not only as endowments grow to give more, but as we all rise to the challenge extended to us in September when Jeff Chaddock and Mark Morrow pledged to leave 97% of their estate to charities within Appalachian Ohio. With their pledge, Jeff and Mark encouraged us all to make a plan for our estate giving now, urging us to be as intentional with our planned gifts as we are with our ongoing gifts.

As you consider your giving, we want you to know that what is most special to us at FAO is learning what you are passionate about and helping you to make a difference in it. That's why we always ask **"What's Closest to Your Heart?"** As a community foundation, we are a one-stop shop for giving to many causes and ensuring your intentions are stewarded forever. It is amazing to see the impact your gifts are making.

Again and again this year, we at FAO felt like we had front row seats to some of the greatest acts of generosity and vision occurring today. We thank you and pledge to continue to be your partner in achieving the charitable dreams closest to your heart.

In gratitude,

**Ronald Strickmaker**  
Chair, Board of Trustees



**Cara Dingus Brook**  
President & CEO





WHAT'S  
CLOSEST TO  
YOUR **HEART?**

# NEW FUNDS

## FAO welcomed 20 new funds in 2016.

### DESIGNATED & ORGANIZATIONAL FUNDS

**William M. and Janet P. Betcher Memorial Endowment for Library Services** to honor the legacies of librarians William and Janet Betcher through annual support to the public library systems in Athens, Meigs, and Vinton counties.

**Margaret and Frances Channel Fund** to support the Athens County Humane Society in spaying and neutering cats in the Athens, Ohio area.

**Field of Hope Community Campus Fund** to support the work of the Field of Hope Community Campus, a faith-based community and outreach center in Gallia County.

**John Glenn Astronomy Park Fund** to support construction and operation of an astronomy education and recreation center in Hocking County's Hocking Hills State Park.

**iBELIEVE in Student Leadership Endowment Fund** to provide opportunities for Appalachian youth to develop leadership, communication, and problem-solving skills.

**Nada Kerr Fund to Support Books for Kids in Athens** to provide books to kindergarten through third grade students at East, West, The Plains, and Morrison-Gordon Elementary Schools in Athens County to encourage summer reading.

**Landrum Endowment Fund** to support the Ross County Board of Developmental Disabilities, known locally as The Pioneer Center, in its work to improve the lives of citizens with developmental disabilities.

### DONOR-ADVISED FUNDS

**Cara and Dominick Brook Family Fund** to provide donor-advised grants.

**Christine Knisely Fund** to provide donor-advised grants.

**Thelma Grace Smith Family Fund** to provide donor-advised grants focused on creating opportunities in Monroe County.

### FIELD OF INTEREST FUNDS

**Nelsonville Foundation Fund** to create opportunities for the citizens of Nelsonville, in Athens County, through grantmaking and by supporting and inspiring philanthropy in the community.

### FUNDS THROUGH PLANNED GIFTS

**The Chaddock Legacy Fund** will support the Dairy Barn Cultural Arts Center, the Southeast Ohio History Center, the Jeff Chaddock Scholarship for Appalachia at Ohio University, the Kennedy Museum of Art at Ohio University, the Ohio University Press, animal welfare in Athens County, and the Foundation for Appalachian Ohio in stewarding the Zenner House as a resource for nonprofits and the creation of the annual Chaddock Award for Philanthropy.

**The Michelle Hart Legacy Fund** will provide educational support to youth through student scholarships.

## SCHOLARSHIP FUNDS

**Crooksville Arts Council and Community Bank Scholarship Fund** to provide scholarships to students from Crooksville, in Perry County, in their pursuit of post-secondary education.

**Myron Fishel Scholarship Fund** to support educational scholarships for Guernsey County residents pursuing post-secondary education.

**Guernsey County Board of Developmental Disabilities Scholarship Fund** to provide post-secondary education scholarships to students who are Guernsey County residents and eligible for services of the Guernsey County Board of Developmental Disabilities.

**James R. Milligan Legacy Fund** to provide scholarships to members of the National Honor Society at Cambridge High School in Guernsey County to honor the memory of James R. Milligan, a former Cambridge High School student.

**The Weissinger Family Memorial Scholarship Fund** to provide an annual scholarship to a graduating senior of Lakota High School who is an active member of Future Farmers of America.

## SCHOOL ENDOWMENT FUNDS

**Goshen Education Foundation Fund** to support and enhance the educational experience, including extracurricular and academic activities, of Goshen Local School District students and staff in Clermont County.

**River High School Alumni and Friends Fund** to support the students and teachers of River High School in Monroe County annually through classroom mini-grants and scholarships.

## FUND SPOTLIGHT: Librarians Inspire a Gift to Communities

We all think of our libraries as centers of learning and imagination. They are where we first read about adventures on the high seas, explored mysterious caves, blasted off into space, and slayed dragons with our fellow princesses. It's where we share the magic of storytime with our children. Longstanding community partners, libraries can be the lifeblood of our towns and counties and serve as a refuge, friend, and community servant.

When an anonymous donor decided to open a fund to support library services in Athens, Meigs, and Vinton counties, it was to not only honor the vital role our libraries play, but to celebrate the legacies of two librarians, William "Bill" and Janet Betcher.

Bill and Janet were dedicated librarians, working at the collegiate and elementary levels in our region, and even at the Library of Congress! Though their library careers took them to many places, including Washington, D.C., Janet's Appalachian Ohio roots brought them back home.



Janet and Bill Betcher

Through annual grants, the Fund will give library directors the chance to support the library services they believe will best fit, inspire, and engage their citizens and communities. Now, their legacies will live on in libraries throughout Athens, Meigs, and Vinton counties, as patrons of all ages experience new worlds and opportunities through the magic of the library.

**CELEBRATING**  
**\$1.5 MILLION**  
**IN GRANTS IN 2016!**



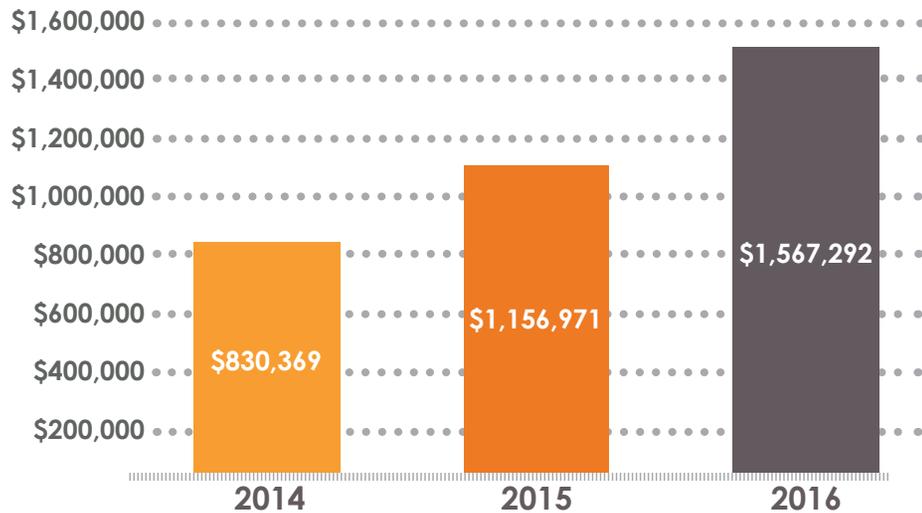
# GIVING GRANTS

Thanks to your gifts, students, schools, nonprofits, and communities throughout the region benefitted from nearly 500 grants in 2016. While we can't share all of these stories in these pages, we hope this story from Perry County will give you a sense of the difference each grant is making.

With a grant from FAO's Community Foundation for Perry County, students in the New Lexington City School District accessed dental care. **Because of this grant, New Lexington students who do not regularly visit a dentist received a dental exam**, including x-rays, a cleaning, sealants, fluoride treatments, fillings, and, when necessary, extractions. Perhaps the best part of the program is that it developed a public-private partnership to ensure the dental care is continued in future school years.

Now, that is something to smile about!

## THANK YOU FOR GROWING OUR GRANTMAKING!



## FAO GRANTS AND SCHOLARSHIPS IN 2016

\$58,685	29 Arts and Culture Grants
\$74,511	24 Community and Economic Development Grants
\$677,654	72 Education Grants
\$75,027	44 Environmental Stewardship Grants
\$366,500	62 Health and Human Services Grants
\$314,915	268 Scholarships

**TOTAL**  
**\$1,567,292 499 GRANTS AND SCHOLARSHIPS**

# OUR BLUEPRINT

## Five areas of investment are essential to growing and sustaining abundant opportunities in Appalachian Ohio – areas we call the *Pillars of Prosperity*.

They are the five areas that enliven our communities, uplift our spirits, and spark our passions. Each one is essential, but it is only when all five of these areas have the resources to work in harmony in a sustainable, long-term way that we can begin to overcome complex problems like generational poverty. Our greatest impact will come when we grow these five Pillars together by giving to the area we are each most passionate about.



FAO created endowment funds in these five areas to grow flexible resources FAO can use to expand opportunities to more citizens and communities. FAO will use the interest and earnings from these endowment funds to expand the impact of successful initiatives. Much like how FAO has taken the model of one county-focused fund in Guernsey and helped ten other communities to create their own funds, the Pillars will help more citizens benefit from proven initiatives.

Fortunately, the funds already under FAO's management and the donors who partner with us on them are powerful collaborators for identifying these efforts. On pages 11 and 12 of this report, you will find a list of more than 175 funds that donors have created within FAO to advance opportunities in one or more of the Pillars areas.

In 2016 alone, these funds invested more than \$1.5 million in grants and scholarships throughout Appalachian Ohio. As we grow the Pillar funds, we can invest in what we've learned from these grants.

The grant from a community-focused fund highlighted on the previous page is a perfect example. It provided children in a Perry County school district with access to dental care and seeded the development of a public-private partnership to sustain the initiative into future school years. It not only helped children access dental care, but revealed a model from which other communities can benefit. As we build our Health and Human Services Pillar, we will use the resources generated to investigate and develop ways to grow this program and others to reach more students.

When we look to the future, we see the Pillar endowments as central to how good work and ideas can grow for the benefit of our citizens. We're excited that this vision for the future is already beginning with our first grants awarded in 2016 in the Arts & Culture and Education Pillars (the sidebar on the page to the right highlights one Education Pillar grant). These grants are growing FAO's efforts to reach more citizens and they are just the start.

But for FAO to grow them further and to identify additional efforts worthy of grants, we need two things. We need to grow the endowment funds that will generate grants for many future generations, and we need to grow funds that can be invested in today's most promising efforts and address pressing needs.



Mary Kaufmann and Jason Braddock of *Easy as Pi* celebrate being one of FAO's first Education Pillar grantees with FAO's Cara Dingus Brook. (Photo Courtesy of Kellogg Photography)

FAO's Pillar funds present donors with unparalleled opportunities to ensure their gifts accomplish the most good possible. When you give to an FAO Pillar endowment, your gift:

- Enables the expansion of proven initiatives to help more people;
- Is matched dollar-for-dollar up to \$100,000 per Pillar through a generous matching gift from Ohio CAT (the Education Pillar has already met its match!);
- Combines with other gifts to produce the large investments necessary for transformational change; and
- Builds permanent capacity to sustain results.

FAO is at the beginning stages of building the endowment needed to support our **Pillars of Prosperity** grantmaking. That means gifts to the Pillars have the opportunity to grow the Pillars permanently, but it also means an annual gift to FAO will be an investment in the very first Pillar initiatives. *Turn the page to learn how your annual gift makes a difference.*

### DID YOU KNOW?

Because of a special matching gift FAO received from Ohio CAT, donors can create **their own named endowment** to support one of the Pillars for \$5,000 instead of the typical \$10,000, while the match lasts!

## OUR FIRST PILLAR GRANTS

As a result of your annual gifts, FAO was able to award a number of inaugural Pillar grants in 2016.

One such grant is supporting an innovative math program, *Easy as Pi*, to expand its reach, growing from serving schools in four counties to reach schools in neighboring counties, possibly even doubling school participation. *Easy as Pi* was developed by a community leader who remembers her own struggles to be confident in math. With a mission to make math fun and approachable for middle school students, the program forms math teams, drumming up the same excitement and engagement for math as is often found among sports teams.

*Easy as Pi* provides support to teachers in leading the teams and in helping students gain comfort using a free, online tutoring tool, The Khan Academy ([www.khanacademy.com](http://www.khanacademy.com)), that can continue to be a resource and guide for students as they advance in math through their high school and college years. *Easy as Pi* has been integral to helping more than 100 middle school students build their confidence in math at a crucial stage in their educational development, and with this year's grant will expand to serve many more students.



*Easy as Pi* Math Team (Photo: Mary Kaufmann)

# YOUR DREAM INSPIRES OTHERS

Whatever your dream, **FAO** can help you match your gift with your passion.

At FAO, we always start with one question: **What's Closest To Your Heart?** It's an important question that leads our discussions with our donors and partners. It's what's at the center of a gift and serves as our guide to helping you make a difference. While everyone's answer to this question is different, the common thread is that each answer inspires others.

We all remember the story of Hazel Syphers from last year's report. Hazel was a Morgan County woman who had a very big idea. She wanted to make sure that every child celebrating Christmas across the county could open a present on Christmas morning. This was no simple goal, but through Hazel's will she was able to create a fund at the Morgan County Community Fund at FAO to make it happen. The fund created through Hazel's estate has now given over 700 gifts to children over its first two years and perhaps even more remarkably, it has expanded the number of volunteers involved in the project from four volunteers in its first year to 70 this second year. Hazel's wish to bring Christmas joy to children through her estate has brought a community together.

We've seen this time and again. The first fund created for a community at FAO was in Guernsey County. The start of this effort inspired over 30 funds to open for the benefit of Guernsey County citizens, totaling \$7 million for the county. Last year, these funds gave nearly \$500,000 back to nonprofits, schools, and students in Guernsey County. One person or one idea often sparks a fire in others when they see how they can be a part of creating change.

FAO was created to help you make a difference in the ways that are most important to you. Whether you dream of supporting a specific community, nonprofit, or school or want to give broadly

to education, FAO can help you match your gift with your passion. No matter what you imagine doing, we're sure your vision and generosity will inspire others to join you in creating opportunities for Appalachian Ohio's citizens and communities.

And that's why having so many different answers to "**What's Closest to Your Heart?**" is so important. Because it's when all of our different gifts combine that we can grow a region abundant in possibility.

## THE DIFFERENCE YOUR ANNUAL GIFT CAN MAKE

With an annual gift to FAO, your answer to **What's Closest to Your Heart?** can simply be creating opportunities in Appalachian Ohio. We are using your annual gifts prudently to launch our **Pillars of Prosperity** grantmaking and to provide the support necessary to help transformational initiatives expand to reach more people.

Interested in becoming a shareholder in FAO and its **Pillars of Prosperity** efforts? Some donors make gifts over a period of a few years to more deeply invest in the grantmaking programs of the **Pillars of Prosperity** while the endowments grow. To become a part of this donor movement, contact FAO at 740.753.1111 to learn more.

# MAPPING OUR IMPACT

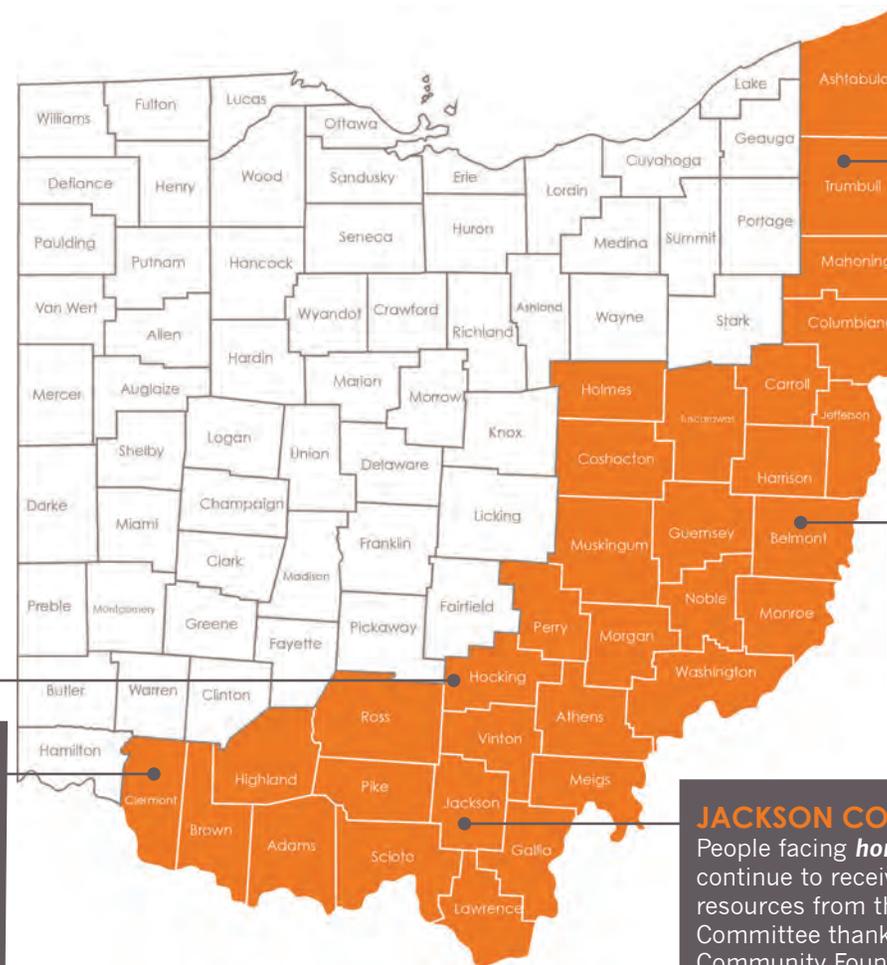
FAO partners with donors and communities throughout the 32 counties we serve to help them give to what's closest to their hearts. Thanks to donors like you, FAO gave nearly 500 grants and scholarships in 2016, totaling over \$1.5 million in support to our communities and citizens. We've highlighted just five grant stories here.

## HOCKING COUNTY:

Logan High School students will know first-hand what it really takes to power **electronics** in our homes by measuring energy used and visiting a power plant where that energy is created, thanks to a grant from the AEP Access to Environmental Education Endowment Fund, a **field of interest** fund at FAO.

## CLERMONT COUNTY:

Students in the Batavia Local School District had the opportunity to become artists themselves and perform under the bright lights of the stage in **Seussical the Musical** thanks to a grant from the Batavia School Foundation Fund, one of FAO's **school endowment** funds.



## TRUMBULL COUNTY:

Daniel Bancroft is passionate about environmental stewardship. Thanks to a **scholarship** from the Ora E. Anderson Scholarship Fund, one of FAO's many donor-established **scholarship** funds, he is studying to pursue a career in ecological conservation.

## BELMONT COUNTY:

All ninth-graders across seven high schools in Belmont County will receive American Red Cross **CPR training** thanks to a grant from the Gulfport Energy Fund, one of FAO's corporate **donor-advised** funds.

## JACKSON COUNTY:

People facing **homelessness** in Jackson County will continue to receive transitional housing and other resources from the Jackson County Homelessness Committee thanks to a grant from the Jackson County Community Foundation, one of FAO's **community** funds.

# FUNDS

as of December 31, 2016

## Pillars of Prosperity Funds for FAO grantmaking



Arts &  
Culture  
Fund



Community  
& Economic  
Development  
Fund



Education  
Fund



Environmental  
Stewardship  
Fund



Health &  
Human  
Services Fund

### COMMUNITY FUNDS

Community Foundation for Perry County  
Gallia Community Foundation  
Guernsey County Foundation  
Harrison County Community Foundation  
Highland County Community Foundation  
Jackson County Community Foundation  
Meigs County Community Fund  
Monroe County Community Foundation  
Morgan County Community Fund

### UNRESTRICTED FUNDS

Bill C. Campbell Memorial Endowment  
Tom and Joyce Johnson Discretionary Endowment

### DESIGNATED FUNDS

**William M. and Janet P. Betcher Memorial Endowment for Library Services\***  
**Margaret and Frances Channel Fund\***  
Connect Appalachia Broadband Initiative (CABI) Fund  
Gallia County Fair Relocation Fund  
Leadership Guernsey Fund

### Nada Kerr Fund to Support Books for Kids in Athens County\*

Tessa Logan Legacy Fund  
Perry County Historical and Cultural Arts Society Fund  
William L. Phillips Fund  
Southeastern Ohio Symphony Orchestra Endowment  
Clovis and Ada Strausbaugh Fund

### DONOR-ADVISED FUNDS

Anonymous Fund of the Guernsey County Foundation Family of Funds  
**Cara and Dominick Brook Family Fund\***  
Chad Clay Memorial Fund  
Gallipolis/Gallia County Bicentennial Fund  
Grandma's Gifts Fund  
Huffman Family Fund  
**Christine Knisely Fund\***  
John and Char Kopchick Legacy Fund  
Ed and Carla Lowry Family Fund  
McClelland Fund  
Virgie Lee McLaughlin Fund  
JM Morgan Fund  
Frank and Esther Ricketts Memorial Fund  
Kevin Ritz Family Foundation  
The Saint Dymphna Fund

The Scholl Family Foundation  
**Thelma Grace Smith Family Fund\***  
Southeastern Ohio Hunger Fund  
Sara Lee Stevens-Youngs Family Memorial Fund  
Stockmeister Family Fund  
Loran and Shirley Stutz Fund  
Supporting Families Fund  
Supporting Student Success Fund  
Tostenson Family Foundation  
The Charlie Wilson Family Education Fund

### CORPORATE DONOR-ADVISED FUNDS

Bellisio Foods Foundation  
Chevron Community Fund  
Gulfport Energy Fund  
Ohio Valley Bank Foundation  
Statoil Monroe County Energy Fund

### FIELD OF INTEREST FUNDS

AEP Access to Environmental Education Endowment  
Ora E. Anderson Conservation Fund for Appalachian Ohio  
Blake and Underwood Student Learning Grant Fund  
Children, Youth, and Families Fund

Economic and Community Development Fund  
Emergency Needs Fund  
Entrepreneurship Development Fund  
Hazel Post Fisher Community Fund  
Gallia County Arts and Culture Fund  
Gallia County Downtown Revitalization Project Fund  
Helen Grettler "Got Music" Endowment Fund  
Dale Hileman Legacy Fund  
Bob and Ruth Holland Community Fund  
Hoops for Heart VFD Fund  
David Hostetler Legacy Fund  
iBELIEVE Foundation  
ICAN! Classroom Enrichment Fund  
*I'm a Child of Appalachia* Contest Fund  
The Jenco Foundation Fund  
Leadership Fund  
Longaberger Fund  
Robbie and Jack Lyttle Fund to Support Classroom Teachers

FAO welcomed 20 new funds this year, including three future funds created through estate gifts.

**\*Indicates new fund opened between January 1, 2016 and December 31, 2016.**

# FUNDS

as of December 31, 2016

## **James R. Milligan Legacy Fund\***

Morgan County Youth Development Fund  
Morgan Foundation Christmas Wish for Kids Fund  
Donald R. Myers Legacy Fund to Support Partnership in Appalachian Ohio

## **Nelsonville Foundation\***

John and Mary Lee Ong Scholarship for Appalachian Ohio Teachers  
Outreach Emergency Disaster Shelter Fund  
Partners for Your Health Fund  
Perry County Hunger Fund  
September 11 Fund  
Somerset Community Fund  
Supporting Community Philanthropy in Appalachian Ohio Fund  
The Yellow Root Fund for Arts, Heritage, and Culture

## **ORGANIZATIONAL FUNDS**

Appalachian Community Visiting Nurses Association Fund  
The Athens Conservancy Fund  
Byesville Rotary Fund  
Chester-Shade Historical Association Fund  
The Clay Center of Ohio Endowment  
COAD Appalachian Development Fund  
Earthtouch-Lou DeWein Conservation Stewardship Fund  
**Field of Hope Community Campus Fund\***  
Friends of the Hocking Hills State Park Fund  
The Fund for Appalachian Ohio Resilience  
**John Glenn Astronomy Park Fund\***  
Guernsey County Senior Citizen Center Fund

HAVAR Funds  
Haven of Hope Endowment  
Miriam Hawes Legacy Endowment Fund for the Rolling Hills School District  
Hocking Area End of Life Care Fund  
**iBELIEVE in Student Leadership Endowment\***

Jewett United Methodist Church Endowment  
Kiwanis Coats for Kids Fund  
Paul Knoop Conservation Education Fund for the Appalachia Ohio Alliance  
**Landrum Endowment\***  
Lewisville & Community Volunteer Fire Department Fund  
Living Word Outdoor Drama Endowment  
Ohio Appalachian Collaborative 2.0 Fund  
Perry County Sportsman Club Endowment  
Rural Action Fund for a Sustainable Future  
Southeast Ohio Regional Medical Center – Guernsey Health Foundation  
Stafford Cemetery Endowment  
Stuart's Opera House Endowment  
United Appeal for Athens County Endowment  
United Seniors of Athens County

## **SCHOLARSHIP FUNDS**

The AK Steel Foundation Scholarship  
Ora E. Anderson Scholarship  
Forrest Bachtel Scholarship  
Lee Beckett Legacy Scholarship  
Bellisio Foods Scholarship  
Catherine Blankenship Scholarship  
Briggs Family Scholarship  
Murray and Lulu Brown Scholarship  
Cambridge High School Class of 1957 Scholarship

Cambridge Singers Scholarship  
Jenny Cornelius-Woltz Memorial Scholarship  
Don Coss Memorial Scholarship  
Jeff Cox and Jane Schumacher Cox Scholarship  
**Crooksville Arts Council and Community Bank Scholarship\***  
Jesse, Olema, and Ralph Drake Scholarship  
William and Frances Dunlap Scholarship  
Lester D. and Thelma I. Ellwood Scholarship  
Bob Evans and Wayne F. White Legacy Scholarship  
John and Elsie Exenkemper Scholarship  
**Myron Fishel Scholarship\***  
Jennifer Garrison Public Service Scholarship  
Zelma Gray Medical School Scholarship  
**Guernsey County Board of Developmental Disabilities Scholarship\***  
Guernsey County Education Assistance Grant Fund  
Bruce and Dolores Hannah Scholarship  
Paul and Charlotte Hope Scholarship  
Vincent and Gene Hope Scholarship  
Inspiring and Supporting Philanthropy Award Fund  
Susan K. Ipacs Nursing Legacy Scholarship  
Susan K. Ipacs PN2RN Nursing Legacy Scholarship  
Charlene Joseph Scholarship  
Mary Kackley-Brill Scholarship  
Commander Lambert Scholarship  
Joseph and Marie Lichtenstein Scholarship  
Madison High School Alumni Scholarship

Donald and Catherine Palmer Scholarship  
Jack and Clara Reho Scholarship  
Paul Sayanek Scholarship  
Winnie Mae Sharpe Education Scholarship  
Ben and Alyce Shaver Scholarship  
Shawnee Alumni Association Scholarship  
Dr. Allen Smith Memorial Scholarship  
Doug Steele Memorial Scholarship  
Ariana R. Ulloa Scholarship  
Janet Hursey Koehler Wade Scholarship  
**The Weissinger Family Memorial Scholarship\***  
Robert Woodruff and Charles and Elizabeth Woodruff Scholarship

## **SCHOOL FUNDS**

Batavia School Foundation  
Cambridge City Schools Alumni and Friends Educational Fund  
Citizens for Rolling Hills School Fund  
Friends of East Guernsey Education Fund  
**Goshen Education Foundation\***  
Husky Education Fund  
New Haven School Fund  
**River High School Alumni and Friends Fund\***  
Southern Perry County Academic Endowment Fund  
West Union Schools Alumni and Friends Educational Fund

You can learn more about these funds by visiting [www.AppalachianOhio.org/Funds](http://www.AppalachianOhio.org/Funds).

# GIVING WITH INTENTION

## A Visionary Gift and Challenge

“What do we want those who love and know us to say about us when we’re gone?” This is the question Jeff Chaddock, a financial advisor, asks his clients and others as they navigate big decisions and plan for legacies beyond their lives. He calls it the ‘Eulogy Test.’



Friends of FAO gathered at the Zenner House in September for the announcement of Jeff Chaddock and Mark Morrow’s gift. (Photo Courtesy of Kellogg Photography)

“A eulogy should reflect your passion, your obsession, your drive,” says Jeff. “By planning for your gifts through your will, trust, or other assets, the integrity of your life is not broken by death. Your life’s work and passion don’t have to stop. I want people to know that it’s okay to plan for their death early.”

As Jeff worked with nonprofits in Appalachian Ohio and beyond, he knew that his own Eulogy Test would lead him to forever support those organizations and missions he is passionately supporting today.

A son of Appalachia, Jeff grew up in Belpre in Washington County and his heart never left the region. His commitment to Appalachian Ohio led him to FAO and it was in FAO that he discovered a philanthropic partner to make his vision of supporting many nonprofits and causes a reality.

On September 22, Jeff and his partner, Mark Morrow, announced they will give 97% of their estate to benefit Appalachian Ohio nonprofits. **They were inspired to publicly announce the planned gift because they hope it will embolden others to join them in planning intentional gifts beyond their lifetimes.**

“I don’t care how large or small the amount, to orchestrate your estate planning and your giving is critical,” shares Jeff. “Without planning, you’re in essence negating or reducing your life’s work to not being important. Why wouldn’t we take the same care of our death as we do everything else in our life?”

For a variety of reasons, most Americans have not made plans for their estates or feel the plan they have made is incomplete. The Eulogy Test is a simple way Jeff helps his clients begin the planning process. As Jeff will attest, when it is combined with FAO’s ability to partner as a backbone organization in their planned giving, the stress can be removed from the process and a sense of peace can take over.

"From my own experience and from working with my clients, I know the feeling of relief that comes when everything is in order," said Jeff. "It feels like you've entered vacation mode. The house is taken care of, nothing is lingering, and now you're free to relax and enjoy."

For Jeff, FAO was a perfect partner for his planning. Through FAO, Jeff could plan to leave gifts to multiple organizations. With the tools and expertise to coordinate Jeff's gift as well as honor his wishes far into the future, FAO brought ease, peace of mind, and maximized tax benefits. Working with FAO also provides the flexibility to change your plan as life changes.

Through the announcement of this gift, Jeff challenged FAO to raise the profile of planned giving and encourage more donors to leave legacies. "FAO offers all of us a kaleidoscope of unlimited opportunities and ways to give. FAO is the perfect one-stop partner to reduce stress about giving and support all of our passions with one plan."



## ILLUSTRATING THE GIFT



Thanks to the artistic talents of Kevin Smalley, you can see a visual of Jeff Chaddock and Mark Morrow's gift to support Appalachian Ohio nonprofits when you turn the page. This illustration shows how easily you can give to all things closest to your heart through FAO.

(Photo Courtesy of Tim Fitzwater Photography)



Jeff Chaddock and Mark Morrow (Photo Courtesy of Kellogg Photography)

## BENEFITTING APPALACHIAN OHIO NONPROFITS

Through a single planned gift to FAO and FAO's one-stop approach to planning, Jeff and Mark will continue to support the causes and organizations they are passionate about for generations to come, including:

- The Dairy Barn Arts Center;
- The Southeast Ohio History Center;
- The Jeff Chaddock Scholarship for Appalachia at Ohio University;
- The Kennedy Museum of Art at Ohio University;
- The Ohio University Press; and
- Animal welfare in Athens County.

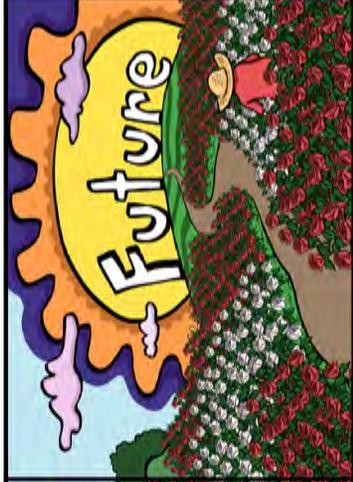
Through the estate, FAO will also receive the historic Zenner House in Athens to serve the nonprofit community of southeastern Ohio as a center for retreats, events, and meetings as well as honoring philanthropists and emerging leaders in the region, in part through the creation of the Chaddock Award for Philanthropist of the Year.



**We work hard during our lives, growing assets and advancing careers.**



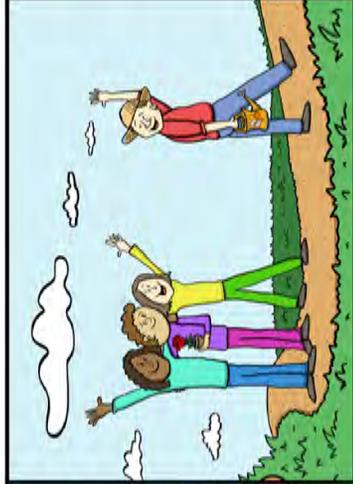
**And we give our time and our resources to make a difference.**



**But how often do we think about how our life's passions and values will carry on?**



**Whether big gifts or small, each of us has a way to continue making a difference forever with FAO.**



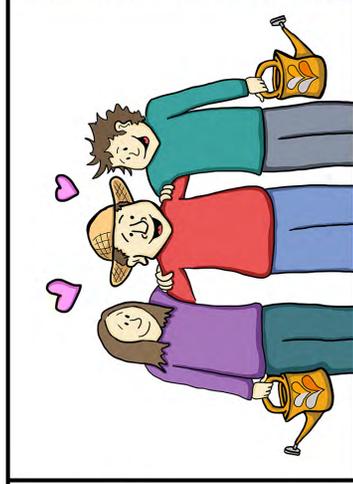
**When it's time to leave, your gifts can forever support the causes that were dear to you in your lifetime.**



**With your plan and FAO's partnership, you can make a difference forever.**



**Each of our gifts will create opportunities for individuals and communities.**



**But it is only when we join together that we will see transformation.**



**Together, we can grow an Appalachian Ohio abundant in possibility.**

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1st Artist Awards  
Service more Counties

Free Admission  
More Children Programs

3x in size

The Dairy Barn

Reinforced Foundation

More Art Teachers

Southwest Ohio History Center

Internship Programs

- space
- exhibits
- educational programming

More Service  
More regions

Zehner House

offices  
events  
retreats

Expand  
Collection

OU PRES

A building for the press!

Support Authors

Help Succeed

Scholarships for Appalachia for App at OU

Access

Up to 20 students a year

OU Kennedy Museum of Art

Enhance Culture

Guest Curator Program

Engage Community

Renovate Ballroom

# A HEART FOR SCHOLARS

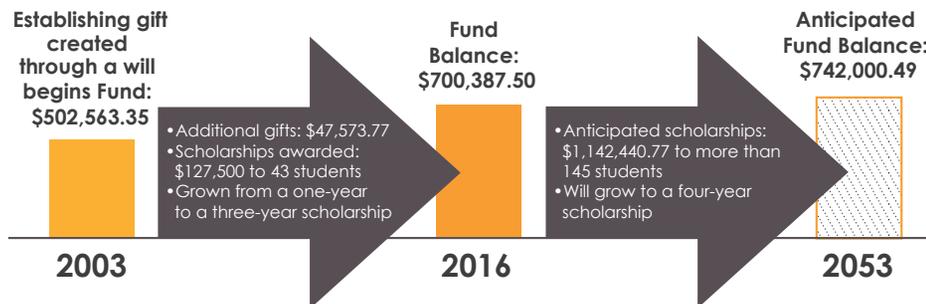
## The Power of Endowment: The Forrest Bachtel Scholarship Fund

Even from the distance of Omaha, Nebraska, Dr. Harry Keig held a place in his heart for his hometown of Middleport, Ohio in Meigs County. He always remembered the impact the teachers in his town had on his life, and none more significantly than Forrest Bachtel, a longtime teacher and coach at Middleport High School. With all Coach Bachtel had meant to him, Dr. Keig wanted to find a way to honor his legacy in the community and to help future generations of students pursue their education.

When Dr. Keig died in 2003, he left a gift in his will of \$500,000 to start an endowment at the Foundation for Appalachian Ohio. The idea was for the Fund to continue Coach Bachtel's legacy of serving students forever through a scholarship.

The Bachtel Scholarship recognizes academic achievement and athletic excellence with awards to a young man and a young woman in each category. In its earliest days, the Fund awarded one-year scholarships of \$2,500, but because of the growth of the endowment at FAO over time, it now awards four students scholarships of \$7,500 to be used for up to three years, and will one day grow to four years. The goal is to see the Fund continue to grow in perpetuity, supporting future generations of Meigs High School students.

### ENDOWMENT WILL GROW WHILE GIVING \$1 MILLION IN SCHOLARSHIPS



*Haiden English and Kelsie Powell are both 2016 graduates who credit the Bachtel Scholarship for making their post-secondary education possible.*

**Haiden English** has always been interested in creating something new. This led her to major in entrepreneurship at Ohio University. "The idea of creating a business is exciting – there are so many things you can create," explained Haiden. She appreciates that people like Dr. Harry Keig created scholarships for Appalachian Ohio students, recognizing their hard work, often with limited resources.



**Kelsie Powell** discovered her chosen medical field – diagnostic medical sonography – through job shadowing. As part of the allied health program at the University of Rio Grande, Kelsie will learn how to use ultrasounds to examine body organs, from a general and cardiovascular perspective. "I want to work at a hospital in the region to provide quality healthcare to the people here," explained Kelsie.



# SCHOLARSHIPS

Together, we gave **268 scholarships in 2016**. FAO is honored to support 48 donor-established scholarship funds in creating educational opportunities.

## **AK STEEL FOUNDATION STEM SCHOLASTIC AWARD**

### **Columbiana County:**

Katie Cook

### **Gallia County:**

Johnny Lively

### **Guernsey County:**

John Barba, II

Tyler Burris

### **Highland County:**

Madison Snyder

### **Jackson County:**

Kyle Turner

### **Jefferson County:**

Jayllex Mills

### **Mahoning County:**

Matthew Heffinger

### **Muskingum County:**

Braden Potts

### **Scioto County:**

Morgan Thornsberry

### **Washington County:**

Adelaide Hirschi

Matthew Neehouse

Kaitlyn Seevers

## **THE ORA E. ANDERSON SCHOLARSHIP**

### **Muskingum County:**

Don Ingold

### **Trumbull County:**

Daniel Bancroft

### **Tuscarawas County:**

Johnathan King

## **BACHTEL SCHOLARSHIP**

### **Academic Award**

#### **Meigs County:**

Jaxon Meadows

Kelsie Powell

### **Athletic Award**

#### **Meigs County:**

Haiden English

Tyler Fields

## **LEE BECKETT LEGACY**

### **SCHOLARSHIP**

#### **Athens County:**

Alisa Kelley

Emily McCulloch

## **BELLISIO FOODS SCHOLARSHIP**

### **Jackson County:**

Kerrigan Hoover

Peyton Miller

Shaw Newsom

Hailee Shover

#### **State of Minnesota:**

Zachary Koop

Jordan Mack

## **CAMBRIDGE HIGH SCHOOL CLASS OF 1957 SCHOLARSHIP**

### **Guernsey County:**

Tessa Foraker

## **CAMBRIDGE SINGERS SCHOLARSHIP**

### **Guernsey County:**

Levi Masters

## **JENNY CORNELIUS-WOLTZ MEMORIAL SCHOLARSHIP**

### **Muskingum County:**

Danae Fields

## **DON COSS**

### **MEMORIAL SCHOLARSHIP**

#### **Guernsey County:**

James Antalis

Maurice Lathan, Jr.

Zavin Orr

Robert Warne

#### **Muskingum County:**

Luke Klinehoffer

Cole Larson

Luke Larson

Ryan Long

Benjamin Van Wey

#### **Noble County:**

Caleb Heller

Ryan Lovette

## **JEFF COX AND JANE**

### **SCHUMACHER COX SCHOLARSHIP**

#### **Guernsey County:**

Jenny Larrick

#### **Monroe County:**

Brooke Jones

Kylie Milhoan

Clay Weckbacher

## **LESTER D. AND THELMA I. ELLWOOD SCHOLARSHIP**

### **Guernsey County:**

Britt Adams

John Barba II

Alyssa Bartlett

Kristi Bates

Nickolas Bates

Robin Bodner

Reanna Frabel

Logan Helmick

Sondra Jones

Makayla LoChiatto

Anna Mallett

Miranda Miser

Anna Jonét Mitchell

Brady Neuhart

Samantha Perkins

Olivia Rhodes

Samantha Roe

Ryan St. Clair

Trislyn Treherne

Randall Tucker

Alyssa Williams

Samantha Workman

## **BOB EVANS AND WAYNE F. WHITE LEGACY SCHOLARSHIP**

### **Adams County:**

Christopher Meade

Colton Meade

Tyler Ryan

### **Athens County:**

Winter Wilson

### **Belmont County:**

Donald Falbo

### **Columbiana County:**

Alexandria Smith

### **Highland County:**

Hannah Burns

Vanessa McGinnis

# SCHOLARSHIPS

## BOB EVANS AND WAYNE F. WHITE LEGACY SCHOLARSHIP CONT.

### **Hocking County:**

Morgan Cottrill

### **Jackson County:**

Kyle Turner

Abigail Waugh

Logan Woodyard

### **Jefferson County:**

Rachel Dziewatkoski

### **Lawrence County:**

Bailie Brownstead

Cody Rawlins

### **Mahoning County:**

Matthew Heffinger

Noor Khalaylah

Victoria Stratton

### **Morgan County:**

Sarah Beam

### **Muskingum County:**

April Bartenschlag

Quinci Jones

Braden Potts

Sydney Prince

Kassandra Settles

Noah Townsend

### **Noble County:**

Molly Scheich

### **Perry County:**

Sanae Dutiell

Shelby Garey

Travis Kunkler

### **Ross County:**

Mackenzie Brown

Charles Skaggs

### **Scioto County:**

Lena Harvey

### **Trumbull County:**

Daniel Bancroft

Lindsey Barto

### **Tuscarawas County:**

Johnathan King

### **Washington County:**

Ashton Amos

Lydia Beardsley

Danielle Darling

Cady Lenington

Kaylen Morrison

Kaitlyn SeEVERS

## JENNIFER GARRISON PUBLIC SERVICE SCHOLARSHIP

### **Noble County:**

Molly Scheich

### **Washington County:**

Alivia Frazier

Brandon Larsen

Cady Lenington

Kaylen Morrison

## GUERNSEY COUNTY EDUCATION ASSISTANCE GRANT FUND SCHOLARSHIP

### **Guernsey County:**

Cole Bennett

Trey Bennett

Zachery Beres

Eric Black

Robin Bodner

Laura Bourne

Samantha Brown

Reid Bugglin

Manny Burch

Kaylie Callihan

Anthony Carpenetti

Matthew Dalton

Dana Davis

Nicholas Dunlap

Victoria Dunlap

Jena Dye

Hunter Dyer

Danae Fields

Lauren Finnegan

Alexandria Fraley

Brittany Fraunfelter

Serra Googins

Sarah Gotschall

Kaleb Graham

Blake Hardesty

Colin Harshbarger

Megan Heady

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Kevin Lapp

Maurice Lathan, Jr.

Elijah LePage

William LePage

Sawyer Leppla

Makayla LoChiatto

Amelia Lucas

Tracy Lyons

Trent Lyons

Anna Mallett

Levi Masters

Clay McCauley

Miranda Miser

Dylan Moore



## HOW DO SCHOLARSHIPS AT FAO WORK?

## DONORS GIVE

- A minimum of \$50,000 to establish a new scholarship,
- \$10,000 to create a fund that will lend support to existing, needs-based FAO scholarships, or
- Any amount to an existing scholarship.

## STUDENTS APPLY

At [www.AppalachianOhio.org](http://www.AppalachianOhio.org) for the scholarships they are eligible for.

**GUERNSEY COUNTY  
EDUCATION ASSISTANCE GRANT  
FUND SCHOLARSHIP CONT.**

William Nelson  
Brady Neuhart  
Emily Orr  
Samantha Perkins  
Diana Price  
Katelyn Regula  
Kelli Reineccins  
Olivia Rhodes  
Kaitlynn Roberts  
Heather Robertson  
Aaron Ruby  
Kevin Scruders  
Courtney Smith  
Kennedy Smith  
Erica Snyder  
Christopher Starr  
Nathanael Steele  
Abigail Tatgenhorst  
Kiersten Taylor  
Kohl Taylor  
Nathan Thompson  
Sarah Thompson  
Noah Townsend  
Trislyn Treherne  
Eric Valentine  
Katelyn Waggoner  
Megan Warne  
Alexis Weaver

Lacey West  
Kristin Taylor  
Amelia Wickham  
Austin Wilkinson  
Trevor Wilkinson  
Alyssa Williams  
Emily Yanico  
Hallie Zimmer  
Samuel Zimmer

**SUSAN K. IPACS NURSING  
LEGACY SCHOLARSHIP**

**Washington County:**  
Morgan Smith

**MARY E. KACKLEY-BRILL  
SCHOLARSHIP**

**Guernsey County:**  
Abigail Stratton

**MADISON HIGH SCHOOL ALUMNI  
SCHOLARSHIP**

**Guernsey County:**  
Kyle Wells

**JAMES R. MILLIGAN LEGACY  
SCHOLARSHIP**

**Guernsey County:**  
Ian Kerr  
Jessica Lucero

**WINNIE MAE SHARPE  
SCHOLARSHIP**

**Guernsey County:**  
Reanna Frabel

**DR. ALLEN SMITH MEMORIAL  
SCHOLARSHIP**

**Scholastic Award  
Jackson County:**

Katelyn Exline  
Peyton Miller  
Logan Woodyard

**Community Service Award**

**Jackson County:**  
Peyton Miller  
Abigail Van Allen  
Logan Woodyard

**DOUG STEELE MEMORIAL  
SCHOLARSHIP**

**Guernsey County:**  
Samantha Brown  
Caryn Hodges

**SOUTHERN PERRY COUNTY  
ACADEMIC ENDOWMENT FUND  
SCHOLARSHIP**

**Perry County:**  
Makayla Alexander  
Garrett Bartley  
Korrie Block

Clinton Boring  
Austin Collins  
Hannah Dishon  
Sanae Dutiel  
Autumn Garbline  
Aubrey Hand  
Haley Hurst  
Andrew Jeffers  
Stephan McGrath  
Chelsea Spergin  
Traven Wood

**ARIANA R. ULLOA SCHOLARSHIP**

**Meigs County:**

Charlea Grant

**WEISSINGER FAMILY MEMORIAL  
SCHOLARSHIP**

**Seneca County:**  
Samantha Miller

## VOLUNTEERS

Review applications and recommend the students who best represent the donors' intentions.

## SCHOLARSHIPS ARE SENT DIRECTLY TO THE ACADEMIC INSTITUTION

## FAO

- Helps donors decide on scholarship criteria
- Preserves donor wishes in perpetuity
- Recruits community volunteers
- Promotes scholarship availability
- Manages scholarship funds



### **FAO'S PILLARS OF PROSPERITY FUNDS**

Endowment funds to support FAO's grantmaking in areas fundamental to a vibrant Appalachian Ohio: Arts & Culture, Community & Economic Development, Education, Environmental Stewardship, and Health & Human Services.

### **ANNUAL GIFTS, UNRESTRICTED FUNDS, & SHARES**

Funds FAO will use to advance programmatic initiatives in the *Pillars of Prosperity* areas while FAO is building the permanent endowment described above. The first focus will be to projects that are transformative, sustainable, and likely to help many communities and citizens. Gifts of all sizes make a difference. Donors pledging \$32,000 or more are recognized as shareholders.

### **COMMUNITY AND FIELD OF INTEREST FUNDS**

Funds FAO or a local committee will designate for the benefit of a specific geographic community or charitable purpose.

### **DESIGNATED, ORGANIZATIONAL, & SCHOOL SYSTEM FUNDS**

Funds established to provide support to a specific nonprofit, public organization, school, or classroom. The leadership of these organizations will advise FAO on the use of grant dollars.

### **SCHOLARSHIP FUNDS**

Funds to support students in post-secondary education. Donors have a choice to recommend their own volunteer scholarship selection committee or to assign this task to FAO's Scholarship Review Committee.

### **DONOR-ADVISED FUNDS**

Funds donors create within FAO that function similar to a private or family foundation. Donors can make a gift or gifts to FAO, receive an immediate tax deduction, and then use the fund to support charitable causes they care about far into the future.

# OUR CALL TO ACTION

## Appalachian Ohio's Philanthropy Gap

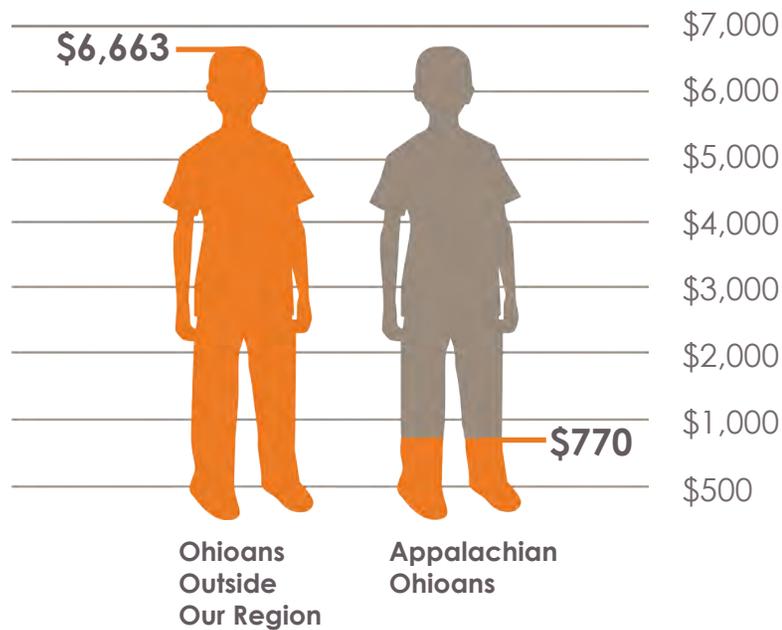
Appalachian Ohio is in the midst of a battle with generational poverty. A great many of our citizens face barriers to educational, economic, and essential quality of life opportunities. At the root of these many challenges, we find an under-capitalization in philanthropic support thwarts efforts to solve deeply-rooted challenges.

If we look at the availability of philanthropic assets statewide, we find our citizens have access to \$770 in per capita philanthropic support while Ohioans outside of our region have access to \$6,663. This means fewer scholarships available to our graduating seniors, fewer programs to help struggling families, less support for public safety concerns, and less investment in and exposure to the arts in all forms.

**Closing the philanthropy gap in our region will unleash the potential of our region's changemakers.** When we, as donors, choose to invest in the areas closest to our hearts, our philanthropic actions will combine to have the effect of improving every aspect of the region's quality of life.

As we close the philanthropy gap, our region's communities and citizens will have the support necessary for solving generational challenges.

Philanthropic Dollars Per Capita



Source: Foundation Center 2016

### MEASURING RESULTS

Follow our region's progress in the **Regional Opportunity Scorecard** and look for the newly-released 2017 edition March 1, on our website at [www.AppalachianOhio.org](http://www.AppalachianOhio.org).

# I'M A CHILD OF APPALACHIA® NETWORK MEMBERS

January 1 through December 31, 2016

Thank you to all those who made unrestricted gifts to the Foundation for Appalachian Ohio.  
Please see page 9 for more information about how your unrestricted dollars are used at FAO!

## INDIVIDUALS

Greg and Eileen Adams\*  
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Bagel Street Deli  
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Ohio Arts Council\*  
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The Staley Fund  
TS Training Solutions  
US Bank\*

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Jeff Chaddock  
Ron Strickmaker

## IN-KIND

Christa Myers  
The Magic of Eric Myers  
Markay Cultural Arts Center  
Stuart's Opera House  
Southeast Beverage Company

\* Indicates Shareholder.  
**BOLD** indicates Cornerstone  
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# THANK YOU to all who made a difference by giving to a fund at the Foundation!

January 1 through December 31, 2016

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Kathie and David Hoffman  
Dorothea Hoffner  
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Alma and Ron Hoopes

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Phyllis and Keith Moody  
Christopher Mooney

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John Morgan  
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Joseph and Valorie Myers  
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Richard Nash  
Wilma Nelms and Mary Smith  
Maloy Nelson, Jr.  
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Phalarope Fund of the Community Foundation of Sonoma County  
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Safe Auto Employees  
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John Atzberger  
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The Dog Studio  
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Helen Grettler  
Becky Hart  
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Tessa Logan  
Sue Lewis  
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FAO was founded on the belief that we can all create greater opportunities for the citizens and communities of Appalachian Ohio when we work together. There are many partners across and beyond our region who are instrumental to FAO's mission.

We would like to thank our Professional Partners who are an essential part of connecting their clients with the philanthropic services of the Foundation for Appalachian Ohio. These partners include financial advisors, attorneys, accountants, and insurance agents. We are honored to help all donors make a difference in what is closest to their hearts and are here to help our Professional Partners serve their clients with philanthropic expertise to aid personal planning and positively impact Appalachian Ohio.

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Contact the Foundation for Appalachian Ohio at 740.753.1111 to become a part of our Professional Partners group and visit [www.AppalachianOhio.org](http://www.AppalachianOhio.org) to learn more about the services available for Professional Partners and their clients.

## Did you know?

Donors establishing a fund over a certain threshold may recommend FAO use their preferred investment advisor to manage the fund. This is one of the ways FAO's circle of Professional Partners grows.

# THANK YOU

to all who volunteered their time and talent in 2016:

Deborah Adam  
Ada Adams  
Jean Andrews  
Darnita Bradley  
Tom Bork  
Jenni Bovyak-Lewis  
Jessica Branner  
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Melanie Baldwin  
Quincy Robe  
John Wells  
Kelsey Wells  
Dick Wetzel  
Mike Workman



STATEMENTS OF FINANCIAL POSITION  
HISTORICAL COMPARISON

	December 31, 2016 Unaudited	December 31, 2015 Audited	December 31, 2014 Audited	December 31, 2013 Audited	December 31, 2012 Audited
<b>ASSETS</b>					
Cash and Cash Equivalents	\$ 3,159,484	\$ 2,163,415	\$ 1,901,421	\$ 1,665,382	\$ 1,033,958
Investments	20,801,999	17,388,478	16,756,856	13,028,613	10,193,890
Pledges Receivable and Other Assets	1,131,395	1,398,104	1,533,290	166,734	249,609
Property and Equipment, net	502,588	535,166	559,309	589,234	663,210
<b>TOTAL ASSETS</b>	<b>\$ 25,595,466</b>	<b>\$ 21,485,163</b>	<b>\$ 20,750,876</b>	<b>\$ 15,449,963</b>	<b>\$ 12,140,667</b>
<b>LIABILITIES AND NET ASSETS</b>					
<b>LIABILITIES</b>					
Liabilities	\$ 213,993	\$ 85,656	\$ 124,058	\$ 50,679	\$ 45,888
Organizational Funds Held for Others	3,243,532	2,035,545	1,852,481	1,815,798	1,579,998
<b>TOTAL LIABILITIES</b>	<b>3,457,525</b>	<b>2,121,201</b>	<b>1,976,539</b>	<b>1,866,477</b>	<b>1,625,886</b>
<b>NET ASSETS</b>					
<b>Current</b>					
Operating	2,718,474	2,901,641	3,183,641	2,434,474	2,428,546
Donor-Advised and Designated	2,448,495	2,660,298	3,304,735	2,810,133	2,259,408
<b>Board Designated</b>					
Operating Reserve	1,432,628	1,389,512	1,333,208	-	-
Operating Endowment	767,481	794,831	801,990	748,752	649,608
<b>Endowments</b>					
Pillars of Prosperity	299,204	115,989	14,923	-	-
Scholarships	5,410,467	5,132,133	5,188,840	4,214,575	2,520,703
Donor-Advised and Field of Interest	5,608,044	4,136,644	3,045,977	1,701,836	1,278,586
FAO Discretionary Grantmaking Funds	1,173,552	1,157,592	1,098,431	1,076,958	994,348
Other	2,279,596	1,075,322	802,592	596,758	383,582
<b>TOTAL NET ASSETS</b>	<b>22,137,941</b>	<b>19,363,962</b>	<b>18,774,337</b>	<b>13,583,486</b>	<b>10,514,781</b>
<b>TOTAL LIABILITIES AND NET ASSETS</b>	<b>\$ 25,595,466</b>	<b>\$ 21,485,163</b>	<b>\$ 20,750,876</b>	<b>\$ 15,449,963</b>	<b>\$ 12,140,667</b>

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“I chose FAO because they had the unique combination of competence and kindness.”

– Joe Ipacs, Susan K. Ipacs Nursing Legacy Scholarship Fund Founder

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Email: info@ffao.org

[www.AppalachianOhio.org](http://www.AppalachianOhio.org)

# FOUNDATION FOR APPALACHIAN OHIO

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## VISION

For the citizens of Appalachian Ohio to live  
in a region abundant with possibilities.

## MISSION

To create opportunities for Appalachian  
Ohio's citizens and communities by  
inspiring and supporting philanthropy.

