

FOUNDATION FOR APPALACHIAN OHIO

ANNUAL REPORT - 2013 --CELEBRATING 15 YEARS

Dear Friends,

It is hard to believe the Foundation for Appalachian Ohio is celebrating its fifteenth year of service to our region... until we reflect on all that has been accomplished.

The creation of the Foundation in 1998 represented a turning point in Appalachian Ohio's history. For the first time, the region's citizens and communities had a regional champion to help develop philanthropy.

Over the last fifteen years, the Foundation has teamed with citizens to demonstrate the power of philanthropy to create opportunities. More than 100 charitable funds have been established and more than \$3.3 million in grants and scholarships have been awarded, with each of the thirty-two counties receiving funding.

The Foundation has worked with a longterm view, initiating efforts to build a lasting culture of philanthropic investment. The *Child of Appalachia* initiative has especially been effective in de-bunking stereotypes that only the wealthy can make a difference through philanthropy, and our *Growing Home* initiatives have attracted gifts that the region would otherwise have lost.

With each year of investment, the Foundation has built the charitable dollars available to our citizens and communities. Within the last five years, the Foundation has tripled its asset size to \$15 million, while also generating over \$10 million in additional support to philanthropic, educational, and economic development initiatives.

As we look toward the Foundation's next fifteen years, the timing could not be better for bringing permanent closure to the "philanthropy gap" holding the region back.

Our results and future potential belong to the people of Appalachian Ohio. Our region's people understand human need in a very personal way, and they repeatedly rise to give generously of time, talent, and treasure. We thank you for all you are investing and for the difference you are making. We look forward to continuing our work together in the coming years.

Sincerely,



Joy Padgett

Joy Padgett, Board Chair On behalf of FAO's Board of Trustees



Cara Wingus Brook

Cara Dingus Brook, President & CEO On behalf of FAO's staff team

In celebration of 15 years, we've updated our logo to better capture the Spirit of Philanthropy at the heart of what we do. Instead of simply showing where we work, we wanted our logo to inspire others to see how we work.

We've also launched a new website at *www.appalachianohio.org* to make it easier for you to make a difference in Appalachian Ohio. Please visit us online! *****



Fund Spotlight: Guernsey County Foundation Fund Guernsey County Foundation Fund Making a Difference by Growing Home

As the Foundation for Appalachian Ohio's first local partnership to build community-based funding, the Guernsey County Foundation Fund is an example of what a community can achieve through philanthropy.

The goal of the Guernsey County Foundation Fund is to improve the quality of life for its community, both now and for generations to come. In partnership with FAO, the Guernsey County Foundation Fund has made tremendous progress toward that goal, establishing 25 separate funds totaling \$3 million in assets.

"This partnership with FAO is a structure that allows donors to meet their charitable giving goals and creates endowment for future funding," explained Maribeth Wright of the Guernsey County Foundation Fund Board.

The Guernsey Family of Funds includes a wide range of resources, such as the Guernsey County Senior Citizen Center Fund, the Southeast Ohio Regional Medical Center-Guernsey Health Foundation Fund, and a number of scholarship funds. A full list of funds to benefit Guernsey County can be found on FAO's website - www.appalachianohio.org.

"We felt that we needed direction on how to build community assets," said Wright. "The FAO staff was instrumental in providing guidance and mentorship to make this happen."

The Guernsey County Foundation Fund focuses on fundraising and grant recommendations, knowing FAO will handle administrative tasks, investments, IRS requirements, and support to development.

"The trustees of the Guernsey County Foundation Fund are all community leaders with professional jobs and our time is limited, so we need the help of an organization like FAO to help us meet our goals of community asset development," continued Wright. "A lot of gifts come from people who have grown up in their community, but live somewhere else," shared FAO's President and CEO Cara Dingus Brook. "While they can't go home, they can **grow home.**"

FAO is working with other communities to Grow Home as well:

ୡ Gallia Community Foundation Fund

- 🏶 Harrison County Community Foundation Fund
- ✤ The Highland County Community Foundation Fund
- ✤ Jackson County Community Foundation Fund
- ✤ Foundation for Meigs County's Future Fund
- ✤ Morgan County Foundation Fund
- Community Foundation for Perry County Fund



The Guernsey County Family of Funds' Cambridge Alumni and Friends Education Fund made it possible for students at Central Elementary School to experience COSI On Wheels' hands-on science exploration.

Photos courtesy of guernseycountyfoundation.org

Donor Spotlight: Ohio CAT Ohio CAT celebrates five-year investment in philanthropy

FAO found a special partner in Ohio CAT when Ohio CAT made a five-year pledge of \$250,000 to the Foundation. With this commitment, Ohio CAT led the way for businesses to make community philanthropy a priority. Over our five years of partnership, Ohio CAT has been a part of significant change for our region.

"Investing in Appalachian Ohio with FAO has been a meaningful way to be supportive of what philanthropy can do in the area," said Ken Taylor, president of Ohio CAT. "It's an opportunity to do good."

Ohio CAT, headquartered in Broadview Heights, is the exclusive, authorized dealer for Caterpillar equipment and engines throughout Ohio, northern Kentucky, and southeastern Indiana.

With its business reaching across many communities in Appalachian Ohio, Taylor felt it was a natural decision to give through a regional organization. "I have an attachment to the area. I have a relationship with the citizens in these communities."

Ohio CAT has made many projects possible for Appalachian Ohio through support of FAO's *I'm a Child of Appalachia* Campaign, including the writing contest and awards, as well as the launch of the Regional Opportunity Scorecard (read more on page 5).

Of the many opportunities Ohio CAT's gift has funded, Taylor remembers his time learning about science with local students best. "COSI on Wheels is the project with which I've been the most involved. I found it rewarding to speak at their assemblies and interact with children in a school environment."

For any company looking for a way to provide enrichment opportunities to Appalachian communities, Taylor recommends FAO as a way to give. "It's nice to know there's a foundation with which people can work to philanthropically invest in the future," said Ken Taylor, president of Ohio CAT. "If a person wants to be connected with a professional and philanthropic agency, this is one with long-term sustainable development in the region."



Ohio CAT and FAO bring COSI on Wheels to Harrison East Elementary School in Hopedale, Ohio. Ken Taylor and Cara Dingus Brook have a little fun with the student participants.



GROWING ECONOMIC OPPORTUNITY

Three years ago, Appalachian Ohio did not have a regional entity to give our development leaders voice and a way to work together across communities. Without this centralized group, our region was missing out on economic and community development opportunities.

FAO made a decision to form an organization to serve Appalachian Ohio in this way. Through the Foundation's leadership, significant time from Greg Adams to serve as a volunteer director in the organization's earliest days, and the collaboration of economic development leaders in our region, the Foundation for Appalachian Ohio incubated and launched the Appalachian Partnership for Economic Growth (APEG), with a mission of creating jobs in Appalachian Ohio.

We will continue to work together to ensure our citizens and communities have access to the resources and opportunities needed to grow stronger.

Measuring Progress Together

We've all heard the saying, "You get what you measure." The Foundation for Appalachian Ohio hopes this is true because the newly released Regional Opportunity Scorecard outlines eight goals for our region in the areas of philanthropy, education, the economy, and community development. These quality-of-life goals have been proposed as a pathway to a more prosperous region.

CHASE 🗘









With a grant from the JPMorgan Chase Foundation, FAO worked with partners across the region to release the first Scorecard at our December 6th *Child of Appalachia* Celebration. Designed to be a dynamic tool that will change over time, this first edition is meant to give us a starting point for discussion and action.

Visit our website • **www.appalachianohio.org** • to learn more.

With the Partnership at work under the direction of John Molinaro, APEG has already helped create **3,250 jobs** for citizens in our region – a sure sign the Foundation's investment in growing this organization was an investment in the future of Appalachian Ohio.



I'M A CHILD OF APPALACHIA® NETWORK MEMBERS

October 30, 2012 – November 30, 2013

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Celebrating the 2013 Child of Appalachia Honoree



Every year, the Foundation honors an individual who embodies its mission of creating opportunities for the citizens and communities of Appalachian Ohio by inspiring and supporting philanthropy. In December, over 160 people came together to recognize Greg Adams as the Foundation's 2013 Child of Appalachia Honoree.

Greg embodies a Child of Appalachia an outstanding citizen of Appalachian Ohio, making a difference in the lives of others. As a full-time volunteer director for the Ohio Appalachian Business Council, Greg supported the Foundation in leading the incubation of the Appalachian Partnership for Economic Growth, a regional economic development organization.

A successful entrepreneur, Greg launched and built Resource Systems, which was recently acquired by Cerner, with fellow Muskingum University graduate and business partner Larry Triplett. In addition to service on a variety of boards, church, and civic groups, Greg is the CEO of TDPI Ventures and has served as the Mayor of New Concord since 1986.

"Greg is an inspiration to us," said Cara Dingus Brook. "He has been a champion for Appalachian Ohio and his dedication to the region is clear in his professional, community, and personal work."

This year's celebration was supported by the Greg and Eileen Adams Family; the Appalachian Partnership for Economic Growth: AT&T: Mike Bennett: Bricker and Eckler; Cramer and Associates; Guernsey-Muskingum Electric Cooperative; Joel Guth: John Gerlach and Co.: Thomas Johnson; Kegler Brown Hill + Ritter; Muskingum County Community Foundation; Muskingum University; Ohio CAT; Origo Branding Company; Larry Triplett; U.S. Bank; and the Foundation's Board of Trustees.

Read more about our past honorees on FAO's website – appalachianohio.org



Photos courtesy of Rod Lang



the foreseeable future so we can celebrate the power of giving near

National Philanthropy Day.

THANK YOU TO OUR CORPORATE MEMBERS FOR THEIR COMMITMENT TO PHILANTHROPY.







CHASE 🗅











Walmart 🔀

FUNDS As of November 30, 2013

I'M A CHILD OF APPALACHIA® NETWORK FUND

COMMUNITY FUNDS

Gallia Community Foundation Fund

The Guernsey County Foundation Fund

Harrison County Community Foundation Fund

The Highland County Community Foundation Fund

Jackson County Community Foundation Fund

Foundation for Meigs County's Future Fund

Morgan County Foundation Fund

Community Foundation for Perry County Fund

DESIGNATED FUNDS

- Connect Appalachia Broadband Initiative (CABI) Fund
- Sclovis and Ada Strausbaugh Legacy Fund
- Sallia County Fair Relocation Fund

Leadership Guernsey Fund

New Haven School Fund

- Southeastern Ohio Symphony Orchestra Endowment Fund
 - Indicates new funds opened from November 1, 2012 - November 30, 2013

DONOR-ADVISED FUNDS

Cara and Dominick Brook Family Fund Chad Clay Memorial Fund Gallipolis/Gallia County Bicentennial Fund Grandma's Gifts Fund Huffman Family Fund

iBELIEVE Foundation Fund

Virgie Lee McLaughlin Fund

JM Morgan Fund

💸 John and Char Kopchick Legacy Fund

Kevin Ritz Family Foundation Fund McClelland Fund

Frank and Esther Ricketts Memorial Fund

The Saint Dymphna Fund The Scholl Family Foundation Fund The Southeast Ohio Hunger Fund Sara Lee Stevens-Youngs Memorial Fund Stockmeister Family Fund Loran & Shirley Stutz Fund Supporting Student Success Fund Supporting Families Fund

REGIONAL FIELD OF INTEREST FUNDS

AEP Access to Environmental Education Endowment Fund

Arts, Heritage, and Culture –The Yellow Root Fund

Children Youth & Families Fund

Economic & Community Development Fund

Education Fund

ICAN! Classroom Enrichment Fund

Robbie and Jack Lyttle Fund to Support Classroom Teachers

John and Mary Lee Ong Scholarship for Appalachian Ohio Teachers

Emergency Needs Fund

September 11 Fund

Entrepreneurship Development Fund

I'm a Child of Appalachia Contest Fund

Leadership Fund

Supporting Community Philanthropy in Appalachian Ohio Fund

DONOR ESTABLISHED FIELD OF INTEREST FUNDS

Ora E. Anderson Conservation Fund for Appalachian Ohio

Helen Grettler "Got Music" Endowment Fund

Gallia County Arts and Culture Fund

Gallia Digital River Project Fund

The Jenco Foundation Fund

Donald R. Myers Legacy Fund to Support Partnership in Appalachian Ohio

Northers For Your Health Fund

🍣 Somerset Community Fund

The Southeast Ohio Emergency Hunger Relief Fund

FOUNDATION FOR APPALACHIAN OHIO ENDOWMENT FUNDS

Bill C. Campbell Memorial Endowment Fund

Foundation for Appalachian Ohio Fund

ORGANIZATIONAL FUNDS

Appalachia Ohio Alliance Paul Knoop Conservation Education Fund

Appalachian Community Visiting Nurses Association Fund

The Athens Conservancy Fund

Byesville Rotary Fund

Chester-Shade Historical Association Fund

COAD Appalachian Development Fund

Friends of the Hocking Hills State Park Fund

Earthtouch – Lou DeWein Conservation Stewardship Fund

HAVAR Funds

Haven of Hope Endowment Fund

Hocking Area End of Life Care Fund

Guernsey County Senior Citizen Center Fund

Miriam Hawes Legacy Endowment Fund for the Rolling Hills Schools District

Southeast Ohio Regional Medical Center-Guernsey Health Foundation Fund

The Living Word Outdoor Drama Endowment Fund

United Seniors of Athens County Fund





SCHOLARSHIP FUNDS

The AK Steel Foundation Scholarship Fund

Ora E. Anderson Scholarship Fund

Forest Bachtel Scholarship Fund

Lee Beckett Legacy Scholarship Fund

Bellisio Foods Scholarship Fund

Cambridge High School Class of 1957 Scholarship Fund

Cambridge Singers Scholarship Fund

Jenny Cornelius-Woltz Memorial Scholarship Fund

Don Coss Memorial Scholarship Fund

Jeff Cox and Jane Schumacher Cox Scholarship Fund

Lester D. and Thelma I. Ellwood Scholarship Fund

Jennifer Garrison Public Service Scholarship Fund

Zelma Grav Medical School Scholarship Fund

Susan K. Ipacs Nursing Legacy Scholarship Fund

Mary Kackley-Brill Scholarship Fund

Janet Hursey Koehler Wade Scholarship Fund

Madison High School Alumni Scholarship Fund

Winnie Mae Sharpe Education Scholarship Fund

Indicates new funds opened from November 1, 2012 - November 30, 2013 **Ben and Alyce Shaver** Scholarship Fund

Dr. Allen Smith Memorial Scholarship Fund

Doug Steele Memorial Scholarship Fund

Ariana R. Ulloa Scholarship Fund

Wayne F. White and Bob Evans Scholarship Fund

SCHOOL SYSTEM FUNDS

Cambridge City Schools Alumni and Friends Educational Fund

Citizens for Rolling Hills School Fund

Harrison Hills City School District Fund

West Union Schools Alumni and Friends Educational Fund

The Foundation grows endowments to enrich quality of life across Appalachian Ohio by creating opportunities. There are pressing needs across our region and we want to make it simple for you to support the efforts you care about most.

-THE PILLARS OF -**OPPORTUNITY**







EDUCATION ECONOMIC AND

COMMUNITY DEVELOPMENT

HEALTH AND HUMAN SERVICES

ARTS AND CULTURE

ENVIRONMENTAL STEWARDSHIP

Each pillar represents an essential piece of a rich quality of life in Appalachian Ohio. Gifts to these pillars will be used on the region's most pressing needs in these five areas so you can be sure that in giving to your passion, you're growing opportunities for the region.

GRANTS

Grant Spotlight: Mini-grant Makes Creative Biology Adventure Possible

High school students learn while engaging elementary students

Kip Brady's students were working on insect collections when he launched into a story about a large wasp. "The students were enthralled. This gave me the idea of having them develop children's stories about the interesting life histories of local forest species. I started preparing my grant proposal that evening."

Kip Brady's biology class at New Philadelphia High School is a recipient of an AEP Access to Environmental Education Mini-Grant to benefit both high school and elementary students.

Grant in hand, Brady and his students are now delving into their project, known as Forest Stories. "I'm developing a list of local forest species. My biology students have organized into small groups and will select species to research. They'll develop a slideshow, share these with their class, and receive input on what their peers find most interesting. From there, they will develop story lines."

It may surprise some that writing non-fiction books would play a central role in a science project. On the contrary, Brady sees this as an important opportunity. "One of the key content statements in the new [state education] standards for kindergarten is that students explore 'gradeappropriate, non-fiction books that accurately describe the characteristics of living things found in Ohio'," said Brady.

"For our district's kindergarten students, this project means they get to learn about local species through a combination of books and direct experience. By interacting with high school students, this project will broaden these young students' concept of community."

The AEP Access to Environmental Education Fund, a permanent grantmaking endowment for the purpose of supporting environmental education efforts benefiting youth who live in the 32 counties of Appalachian Ohio, is essential for projects like this one. "This is a very powerful educational experience, but it would probably not be possible without grant funding," said Brady.



New Philadelphia High School biology teacher Kip Brady is taking his students, as well as elementary students, on a learning adventure courtesy of an AEP Access to Environmental Education Mini-Grant.



Kip Brady and his students discuss their findings during an outdoor classroom experience.

Photos courtesy of Kip Brady

FAO AWARDS OVER \$500,000 IN GRANTS IN 2013

\$20,999.00	18 AEP Access to Environmental Education Mini-Grants
\$107,950.00	72 Scholarships
\$26,894.50	21 Duke Energy ICAN! Classroom Enrichment Grants
\$55,500.00	106 Writing Contest Grants
\$27,697.97	22 Field of Interest Grants
\$62,052.50	16 Geographic, Organizational, and School Grants
\$218,529.95	70 Donor Advised Fund Grants
TOTAL: \$519,623.92	325 Grant Awards

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SCHOLARSHIP AWARDS

AK Steel Foundation Scholastic Award:

Mahoning County Derek Janek Pike County Brenon Hines

The Ariana R. Ulloa Scholarship:

Athens County Ndeye Penda Leye

Bachtel Scholarship Academic Award:

Meigs County Thaddaeus Ellis Madelyn Thomas Athletic Award:

Meigs County Matthew Casci Alyssa Cremeans

Bellisio Foods Scholarship:

Jackson County Jaclyn Lowe MaKenna Tilley

Cambridge High School Class of 1957 Scholarship: Guernsey County

Elizabeth Nelson

Don Coss Memorial Scholarship:

Guernsey County James Antalis Charles Beaver Quintin Fettes James Luyster Zachary Roe Benjamin Standiford Dillon Sunnafrank Ian Wildes

Doug Steele Memorial Scholarship:

Guernsey County Austin Douglas Sarah Thompson

Dr. Allen Smith Memorial Scholarship – Community: Jackson County

Mariah Stepp Scholastic: Jackson County Ayron Lord Jessica Howell

Jeff Cox and Jane Schumacher Cox Scholarship: Guernsey County T'anna Thurston

Monroe County
Chelsie Tewanger

Lester D. and Thelma I. Ellwood Scholarship:

Guernsey County Britt Adams Alissa Bodner Joseph Galloway Kody Gann Miranda Miser Kristin Oliver Abbie Orr Alicia Swain Trislyn Treherne Mahaley Vargo Breann Voytko Angelia Werner

Lee Beckett Legacy Scholarship:

Athens County Christopher Breeze Alicia Carter

Madison High School Alumni Scholarship: Guernsey County Courtney Poland

Mary Kackley-Brill Scholarship:

Guernsey County Brett Shipman

Ora E. Anderson Scholarship:

Athens County
Catherine Blyth

Susan K. Ipacs Nursing Legacy Scholarship:

Athens County Tabitha Cox

Wayne White and Bob Evans Scholarship:

Belmont County Kaitlyn Fleming Juliana Madzia Kerri Rogers Brown County McKenna Koewler Niya Royal Clermont County Travis Bee Columbiana County Victoria Drago Collin Dunlap Coshocton County Anna Powell

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Jefferson County

Kara Detty Scioto County Cassie Edwards Mitchell Richardson Tuscarawas County Madison Montgomery

Winnie Mae Sharpe Education Scholarship:

Guernsey County **Tyler Dingus**

Zelma Gray Medical School Scholarship:

Guernsey County Kaci Cunningham



Mitchell Richardson,

has always had a passion for music. While in high school in Scioto County, Mitchell, a percussionist, had the opportunity to perform twice in the Macy's Thanksgiving Day Parade in New York City, and marched in the pre-game and half-time shows of the **BCS Orange Bowl National** Football Championship in Miami, Florida, Mitchell is enrolled at Morehead State University, where he is pursuing a major in music education. These opportunities are available because of scholarship funds. With the support of businesses, like AT&T, and individuals this year. FAO awarded more scholarships to students like Mitchell.

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THANK YOU

to all those who designated aifts to specific funds at the Foundation. We're honored to help you make a difference.

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Karen & Carl Waller

Michael & Lisa Zehnal Jasmine Zellner

In Honor Of:

Justus and Captla Alderman George W. Kincaid Mary E. (Kincaid) Hiatt Clara B. (Kincaid) Nichols B. Louise (Kincaid) Randolph-Brown

In Memory Of:

Eilene Blake John Wallace Gillogly Rev. Ivan Grooms Beverly, Eddie, & Jim Bob Hattan George Kincaid & Mary Kincaid Hiatt Peggy Kirk Timothy W. Meredith Clara Kincaid Nichols Mary Puskarich Christy Wolfe Brant & Danny Wolfe

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Thank you to everyone who volunteered their time and talent this year to make

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Susan Urano Lauren Worley Rebecca Zurava

Kent State University **Tuscarawas Campus** Washington State **Community College** Zane State University

GIVE. GROW. CREATE.

Foundation for Appalachian Ohio Summary Financial Information (Unaudited)*

ASSETS		
FAO Cash and Investments	\$2,210,498	
Donor and Program Cash and Investments	12,479,532	
Pledges Receivable	169,540	
Net Fixed Assets	664,280	
Other Assets	3,669	
Total Assets	\$15,527,519	

LIABILITIES AND NET ASSETS		
Total Liabilities	\$48,605	
Total Net Assets	15,478,914	
Total Liabilities and Net Assets	\$15,527,519	

* Check appalachianohio.org for our most recent audited financials.

15 YEARS AS THE REGION'S COMMUNITY FOUNDATION

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.



PO Box 456 35 Public Square Nelsonville, Ohio 45764 740.753.1111 **appalachianohio.org**