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?
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 storytelling 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.

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!
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!

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**THANK YOU FOR GROWING OUR GRANTMAKING!**

<table>
<thead>
<tr>
<th>Year</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>$830,369</td>
</tr>
<tr>
<td>2015</td>
<td>$1,156,971</td>
</tr>
<tr>
<td>2016</td>
<td>$1,567,292</td>
</tr>
</tbody>
</table>

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**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
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.

**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), 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.

**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!
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.

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**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.
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.

**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.

**HOCKING COUNTY:** Logan High School students will know firsthand 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.

**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.

**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.

**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.
FUNDS
as of December 31, 2016

Pillars of Prosperity Funds for FAO grantmaking

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.
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

Funds as of December 31, 2016

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 Senior citizens 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
Selma 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. Ixach 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.
“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.’

“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.

(Bio Courtesy of Tim Fitzwater 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.

© 2016 Kevin Smalley
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.

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.
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:* Matthew Neehouse

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*

JENNY CORNELIUS-WOLTZ MEMORIAL SCHOLARSHIP
*Muskingum County:* Danae Fields

DON COSS MEMORIAL SCHOLARSHIP
*Guernsey County:* James Antalis
*Maurice Lathan, Jr.*
*Robert Warne*

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Morgan Cottrill
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Trey Bennett
Zachery Beres
Eric Black
Robin Bodner
Laura Bourne
Samantha Brown
Reid Bugglin
Manny Burn
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
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Levi Masters
Clay McCauley
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**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.
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Kyle Wells

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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.
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.

Source: Foundation Center 2016
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!

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Christa Myers
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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

Kyger Dental Associates
L&L Scrap Metals Recycling
Lecrone Sanitation
Lee Industries
Leslie E. Small Trucking
LS 2 Printing
M&G Polymers USA
Marietta Welfare League
Mark Porter Ford
Mark Porter GM Superstore
Marsh & McLennan Agency
Maysville Local School District
McLain, Hill, Rugg & Associates
Micheli, Baldwin, Northrup, LLP
Milliron Clinic
Montgomery Trucking Company
Morgan Stanley
Mount Tree Service
MRM Construction
MS Consultants
Muskingum County Community Foundation
National Bank of Adams County
Nationwide Children’s Hospital
Nelsonville Restoration Foundation
New Life Church Benevolence Missions
Nikken Foods USA
Noe and Saunders
North Valley Bank
Norris Northup Dodge
Ohio Credit Union League
Ohio Regional Development Corporation
Ohio University Credit Union
Ohio Valley Supermarkets
OhioHealth
Old Mill Craft Beer
One Source Food Solutions
Optimist Club of South Columbus
Osteopathic Heritage Foundation of Nelsonville
Passion Play Morgan County
Peoples Bank
Phalarope Fund of the Community Foundation of Sonoma County
Pleasant Valley Hospital
PNC Foundation

Precision Signs & Graphics
Prime, Inc.
Princeton-Bell Company
Pythian Sisters
Reliable Staffing Services
RESA 5
Riceland Foods
Riesbeck’s Food Market
River High School Alumni Association
Riverbend Animal Clinic
Rocky Brands
Ron Rothenbuhler Trucking
Ross County Board of Developmental Disabilities
Rotary Club of Belpre
Roundtree Rentals
RVC Architects
Safe Auto Employees
St. Paul's Trail Run Ladies Aid Society
Sardis Community Welfare Club
Save-A-Lot Bidwell
Servpro of Jackson and Gallia Counties
Settlers Bank
Shake Shoppe
Sharefax Credit Union
Shawnee Alumni Association
Shipman Heating and Cooling
Smith Chevrolet
Smith Financial Advisors of Hilliard Lyons
Southern Local School District
State Farm Insurance Agency
State Farm Mutual Insurance Company
Statoil Energy
Super 8
Swiss Valley Farms
The Community Bank
The Homan Foundation
The Ohio State University
The Ohio Valley Bank
Thompson Insurance
Thrivent Financial
Time Warner Cable
TLW: Transportation Leasing and Warehousing
Tommy Time Productions

Total Quality Logistics
Tri State Fireworks
Tri-County Career Center
Tri-Valley Local Schools
Trinity United Church of Christ (Lewisville)
Triple T Transport
Tuscany Italian Restaurant
United Healthcare Systems
Unique Auto Care
U.S. Durum Milling
Village Bakery Cafe
Vorys, Sater, Seymour and Peese
Welsh Electric
WesBanco Bank – Southeast Ohio Region
WesBanco Bank – Wheeling
West Union High School Alumni Association
WestRock
Wiseman Agency
Wood County Board of Education
Woodland Centers
Woodfield Kiwanis Club
Woodfield True Value Home Center
WSA Studio
Zane Foodmart
Zion United Church of Christ

IN MEMORY OF

David Altizer
Ora Anderson
Fred Baker
Nola Baker
Bernice Bolyard
John H. Brodt
Janice Bryant
Hazel Burkhart
Bill Campbell
Fred Cady
Charles DeLawder
Elizabeth Reber Dunkel
Ralph E. Dunkel
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Nancy Groom
Becky Hart

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David Hostetler
Regina Kettler
Betty Kissel
John Kissel
Mary Knauer
Dr. Quentin Knauer
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Anne Louiso
Ben Lowder
Katie Massie
Joyce Ellis McClanahan
Robert Miller, MD
Donald R. Myers
Patrick Rose
Marjorie Speidel
Tommy Joe Stewart
Elaine West
Jack Workman

IN HONOR OF

Lizzie Atzberger
John Atzberger
Janet Campbell
Marianne Campbell
Jeff Chaddock
The Dog Studio
William (Bill) Dunlap
Helen Gretler
Becky Hart
David Hostetler
Judy Johnson
Miriam Keith
Dick Kendall
Linda (Springer) Kendall
Nada Kerr
Mary Knauer
Dr. Quentin Knauer
Tessa Logan
Sue Lewis
Ron Strickmaker
HELPING YOU WITH YOUR CLIENTS

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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Daniel Engard, Wells Fargo Advisors
Tyler Hawk, Edward Jones
Greg Hossman, Peoples Bank
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Brent Markley, Stratos Wealth Advisors
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Management Group of Wells Fargo Advisors
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PROFESSIONAL PARTNERS
Bricker & Eckler LLP

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.

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

THANK YOU

to all who volunteered their time and talent in 2016:

Deborah Adam
Ada Adams
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Sarah Webb
Lauren Worley
Jack Wright
Rebecca Zurava

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Janine Conrad
Judge Luann
Cooperrider
Jeff Dennis
Tony Fiore
G. Courtney Haning
Deb Hutmire
Mayor Tom Johnson
John McGaughey
Tim McLain
Chris Mooney
John Winneneberg
Kevin Wood

Gallia Community Foundation Fund
Shayna Chapman
Melissa Clark
Matt Johnson
Jodie McCalla Penrod
Robbie Pugh
Brynn Saunders
Patrick Saunders
Scott Saunders
Jimmy Wiseman

Guernsey County Foundation Fund
William Black
Cindy Bond

Harrison County Community Foundation Fund
Allison Anderson
Lori Milleson
Scott Pendleton
Bob Positano
Matthew Puskarich
John Tabacchi

Jackson County Community Foundation Fund
Sandy Borden
John Jones
Cindy Kidd
Susan Stockmeister
Carol Wright

Monroe County Community Foundation Fund
Nikki Baker-Lude
Ryan Moyer
Karena Reusser
Gwynn Stewart

Morgan County Community Fund
Melanie Baldwin
Quincy Robe
John Wells
Kelsey Wells
Dick Wetzel
Mike Workman

Dave Caldwell
Andrew S. Dix
Jeff East
Judge David A. Ellwood
Miguel Genel
Daniel Padden
David Wilson
Maribeth Wright

William Black
Cindy Bond
## FINANCIAL SUMMARY

### STATEMENTS OF FINANCIAL POSITION
#### HISTORICAL COMPARISON

<table>
<thead>
<tr>
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<tbody>
<tr>
<td><strong>ASSETS</strong></td>
<td></td>
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<tr>
<td>Cash and Cash Equivalents</td>
<td>$3,159,484</td>
<td>$2,163,415</td>
<td>$1,901,421</td>
<td>$1,665,382</td>
<td>$1,033,958</td>
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<td>Investments</td>
<td>$20,801,999</td>
<td>$17,388,478</td>
<td>$16,756,856</td>
<td>$13,028,613</td>
<td>$10,193,890</td>
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<tr>
<td>Pledges Receivable and Other Assets</td>
<td>$1,131,395</td>
<td>$1,398,104</td>
<td>$1,533,290</td>
<td>$166,734</td>
<td>$249,609</td>
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<tr>
<td>Property and Equipment, net</td>
<td>$502,588</td>
<td>$535,166</td>
<td>$559,309</td>
<td>$589,234</td>
<td>$663,210</td>
</tr>
<tr>
<td><strong>TOTAL ASSETS</strong></td>
<td>$25,595,466</td>
<td>$21,485,163</td>
<td>$20,750,876</td>
<td>$15,449,963</td>
<td>$12,140,667</td>
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<td><strong>LIABILITIES</strong></td>
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<tr>
<td>Liabilities</td>
<td>$213,993</td>
<td>$85,656</td>
<td>$124,058</td>
<td>$50,679</td>
<td>$45,888</td>
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<tr>
<td>Organizational Funds Held for Others</td>
<td>$3,243,532</td>
<td>$2,035,545</td>
<td>$1,852,481</td>
<td>$1,815,798</td>
<td>$1,579,998</td>
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<tr>
<td><strong>TOTAL LIABILITIES</strong></td>
<td>$3,457,525</td>
<td>$2,121,201</td>
<td>$1,976,539</td>
<td>$1,866,477</td>
<td>$1,625,886</td>
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<tr>
<td><strong>NET ASSETS</strong></td>
<td></td>
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<tr>
<td>Current</td>
<td></td>
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<tr>
<td>Operating</td>
<td>$2,718,474</td>
<td>$2,901,641</td>
<td>$3,183,641</td>
<td>$2,434,474</td>
<td>$2,428,546</td>
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<tr>
<td>Donor-Advised and Designated</td>
<td>$2,448,495</td>
<td>$2,660,298</td>
<td>$3,304,735</td>
<td>$2,810,133</td>
<td>$2,259,408</td>
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<tr>
<td>Board Designated</td>
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<tr>
<td>Operating Reserve</td>
<td>$1,432,628</td>
<td>$1,389,512</td>
<td>$1,333,208</td>
<td>-</td>
<td>-</td>
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<tr>
<td>Operating Endowment</td>
<td>$767,481</td>
<td>$794,831</td>
<td>$801,990</td>
<td>$748,752</td>
<td>$649,608</td>
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<tr>
<td>Endowments</td>
<td></td>
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<tr>
<td>Pillars of Prosperity</td>
<td>$299,204</td>
<td>$115,989</td>
<td>$14,923</td>
<td>-</td>
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<tr>
<td>Scholarships</td>
<td>$5,410,467</td>
<td>$5,132,133</td>
<td>$5,188,840</td>
<td>$4,214,575</td>
<td>$2,520,703</td>
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<tr>
<td>Donor-Advised and Field of Interest</td>
<td>$5,680,044</td>
<td>$4,136,644</td>
<td>$3,045,977</td>
<td>$1,701,836</td>
<td>$1,278,586</td>
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<tr>
<td>FAO Discretionary Grantmaking Funds</td>
<td>$1,173,552</td>
<td>$1,157,592</td>
<td>$1,098,431</td>
<td>$1,076,958</td>
<td>$994,348</td>
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<tr>
<td>Other</td>
<td>$2,279,596</td>
<td>$1,075,322</td>
<td>$802,592</td>
<td>$596,758</td>
<td>$383,582</td>
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<tr>
<td><strong>TOTAL NET ASSETS</strong></td>
<td>$22,137,941</td>
<td>$19,363,962</td>
<td>$18,774,337</td>
<td>$13,583,486</td>
<td>$10,514,781</td>
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Kelly Morman
Communications & Programs Coordinator

CONTACT US

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Nelsonville, OH 45764

Phone: 740.753.1111
Fax: 740.753.3333
Email: info@ffao.org

www.AppalachianOhio.org

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

– Joe Ipacs, Susan K. Ipacs Nursing Legacy Scholarship Fund Founder
FOUNDATION FOR
APPALACHIAN OHIO

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.