

THANK YOU



FOUNDATION FOR APPALACHIAN OHIO

2017
ANNUAL
REPORT



FOUNDATION FOR APPALACHIAN OHIO

January 20, 2018

Dear Friends,

We chose the photo of a child writing “thank you” for this year’s cover because it perfectly captured how we feel about all of your investments in FAO – thankful!

It’s hard to believe, but 2018 will mark FAO’s 20th year. As we prepare for this special birthday, it seems fitting to pause for a quick celebration of how far we have come by working together.

- Our movement began in 1998 with \$1 million from the State of Ohio to create a foundation for our region and has grown to nearly \$30 million in philanthropic assets, with an estimated additional \$50 million in planned gifts expected.
- We have grown from our first fund to now represent a family of nearly 190 separate charitable funds. (See the full list on pages 11-12)
- Our grantmaking has reached an all-time high, tripling over the last three years, totaling more than \$2.4 million this year. (Read more on page 4)

Our goals for 2017 centered around expanding the impact and reach of our programs while also building capacity to better serve you and our region. This year, we:

- Launched two programmatic initiatives now poised for regional impact: one to combat substance abuse and another to strengthen nonprofits (read more on pages 8 and 9);

- Increased planned giving while developing tools for you to use in your own planning, including a website you can read about on page 6; and
- Expanded partnerships by growing local community foundation funds and increasing the diversity of FAO’s networks for change.

We’ve made a big difference working together, but we aren’t done yet. The philanthropy gap remains a barrier for the children of Appalachia (see page 3), and we need your help. As each of us gives, we will together transform Appalachian Ohio into a region abundant in possibilities.

In 2018, FAO will begin a process of visioning and planning for the future. We hope you will join us in this journey, and specifically, we hope you will give yourself the gift of time to celebrate what you have accomplished with your giving and to dream about what is next.

With a simple and heartfelt thank you,

Cara Dingus Brook
President and CEO

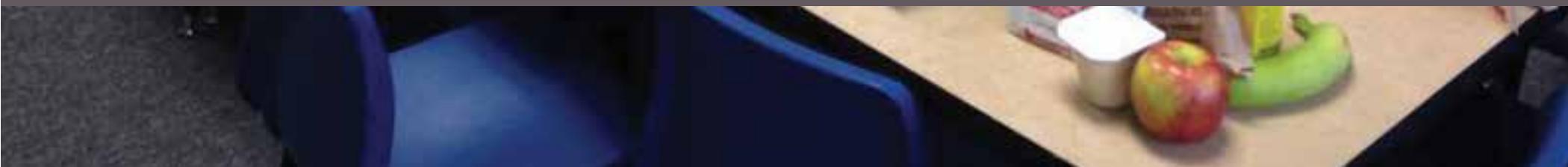


Ronald Strickmaker
Chair of the Board of Trustees





For children who receive meals at school, the weekends can leave them hungry and waiting for Monday's return to the cafeteria. This year alone, FAO awarded more than 500 grants in the areas Arts & Culture, Community & Economic Development, Education, Environmental Stewardship, and Health and Human Services, including support to backpack programs that make sure students have food to eat on the weekends.



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,

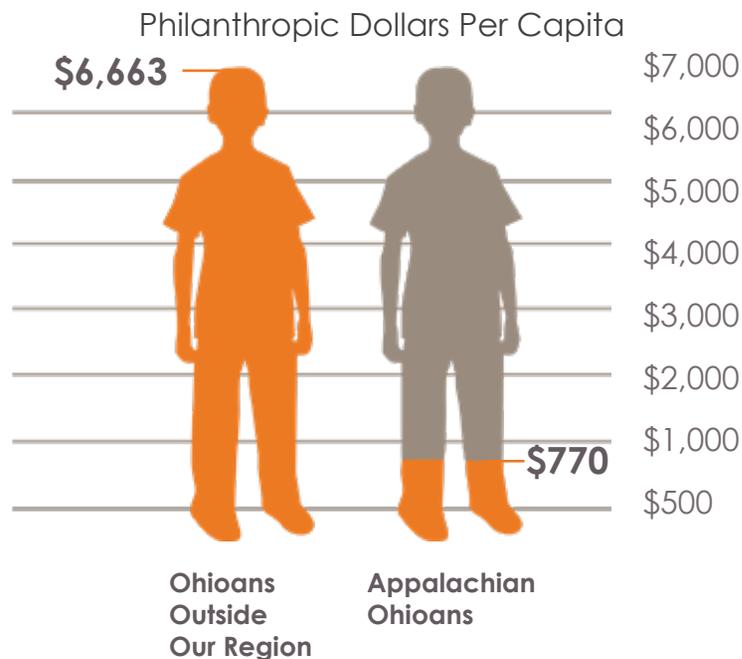
fewer programs to help struggling families, less support for public safety concerns, and less investment in and exposure to the arts in all forms.

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. And there are so many ways to be a part of this work with the Foundation:

- Give an unrestricted gift so the Foundation can guide it toward the region's greatest needs;
- Choose to designate your gift to the area of need *closest to your heart* by selecting from the five *Pillars of Prosperity* grantmaking funds detailed on page 7;
- Create your own legacy plan, borrowing inspiration from those profiled on pages 5 and 6;
- Open your own fund or support an existing fund such as those listed on pages 11 and 12; and
- Invest your time as a volunteer like those on page 24 or by introducing FAO to others who are likely to join in our mission through gifts of time, talent, or treasure.

With each of these gifts, you will be changing the course of philanthropy's history in Appalachian Ohio.



Source: Foundation Center 2016

GROWING GRANTMAKING

Chase Watts, a member of the Ohio State Highway Patrol, understands that for youth to build trust and have a positive relationship with law enforcement and other emergency responders, they need to know them. He also recognizes kids of all ages need caring adults to read with them. That's why he created **Books with Badges**, a community outreach program based in Belmont County that connects local law enforcement and emergency responders with students at local elementary schools through storytelling sessions.

Thanks to a grant from the **Gulfport Energy Fund**, Books with Badges will reach more students in 2018. This grant will support a new Mobile Library, a customized Ford Transit Connect van that will travel to 14 partner schools and beyond.

THANK YOU FOR GROWING OUR GRANTMAKING!

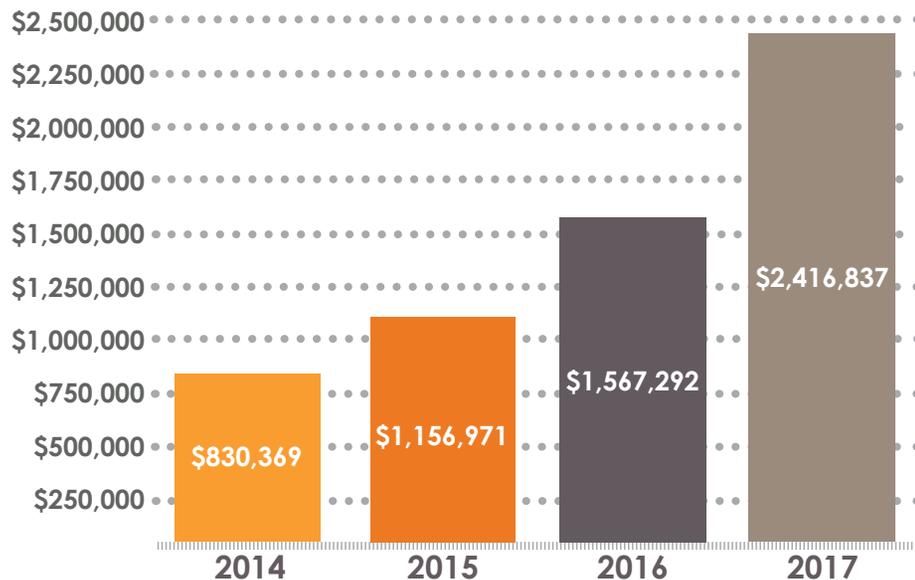


Photo courtesy Books With Badges

2017 GRANTS, SCHOLARSHIPS, AND PROGRAM SUPPORT

\$27,550	24 Arts and Culture Grants
\$106,366	36 Community and Economic Development Grants
\$249,825	70 Education Grants
\$737,485	28 Environmental Stewardship Grants
\$606,168	80 Health and Human Services Grants
\$320,008	277 Scholarships
\$369,435	iBELIEVE Program Support

TOTAL
\$2,416,837 **515 GRANTS AND SCHOLARSHIPS**

CELEBRATING A LEGACY

“It’s not about money. It’s about people. They’re the most important asset a community has. Everything I do comes back to that single thought.”

Guided by his long-held love for Morgan County, Mike Workman shares his time and passion with his community in many ways, including his commitment to the mission of the Morgan Community Fund. Mike has always been a strong believer that children are the next generation of entrepreneurs, leaders, and workers and are vital to the community's growth, prosperity, and well-being. Because of that, he is part of the local fund committee focused on helping more people give back to Morgan. And now, he and his wife, Pam, have found a new way to make a big difference, by leaving their home as a gift in their wills.

Mike and Pam wanted to give back in a way that would last, would bring the community together, and would “give people a place to go for experiences they wouldn't normally have.” So,



they decided to make a plan to leave their historic home to the Morgan Community Fund.

Mike and Pam's home was built in 1883 and they are only the second family to live in it. They have restored and maintained their home in the middle of McConnelsville in a way they believe can serve many beyond themselves.

Each and every aspect of their vision for the home is focused on bringing the community together and making a difference in the lives of Morgan County's citizens – from young to old. The first priority will be providing office space for the Morgan Community Fund so it can invest in the children of the community and continue to grow in its service to all those who want to make a difference by giving back. Their vision also includes creating a place for a community art and learning space. The needs of the community will determine if that might include art exhibitions, music recitals or classes, or continued learning opportunities for retired citizens.

A local fund that invests in a wide range of programs to put Morgan's children on a path to success, the Morgan Community Fund is designed to partner with donors to tailor their gifts to fit their wishes. The Morgan Community Fund is already experienced with making planned gifts a reality with their development of the Morgan Foundation Christmas Wish for Kids Fund, created through a gift in Hazel Syphers's will to ensure all children open a present Christmas morning.

Transforming a donor's wishes into community support is really what the Morgan Community Fund is all about and its ability to handle a more complex gift, like real estate, made it the perfect

partner for Mike and Pam. They have made plans for their home, as well as planned for the creation of a trust that will be used for maintenance over time. The structure of the gifts means they can still enjoy their home during their lifetimes. They feel confident that when the time comes, their home and the values of putting the people of Morgan County first will be carried out by the Morgan Community Fund far into the future.

"I think people would like to know they can decide right now what they want someone else to have and share, or the community to have and share, and still use it for as long as they live. Anyone can give back this way, it's easy to set up with your estate advisor and will be a great benefit to your community for many years in the future."

FAO'S NEW WEBSITE CAN HELP YOU PLAN YOUR LEGACY

This year, FAO launched a new website designed to help you find the best way to leave a gift that will make a lasting difference. When you visit this website focused on planned giving, you can read donor stories, find the right language for a bequest, learn more about gift annuities, or download a guide to help you start or update your will.



Visit us at www.AppalachianOhio.org and click "Give Tomorrow" in the upper right corner to visit the website, or call us at 740.753.1111. We're here to answer any questions you have as you think about what's closest to your heart and how you can support it.



MIKE AND PAM'S STORY IS ONE OF MANY. HERE IS A GLIMPSE AT WHAT OTHER LEGACY PLANS MADE AT FAO WILL DO.

- Fund the Ohio Department of Natural Resources Division of Wildlife's K9 Program and its work to promote and protect Ohio's fish and wildlife resources
- Childcare tuition to help Harrison County parents further their own education
- Increased support for library services in Athens, Meigs, and Vinton counties
- Support to a number of favorite Guernsey County nonprofits
- The future development of a bike path in Southeast Ohio
- Support to the Perry County community with the gift of a home
- Help to families in need with young children in Perry and Hocking counties
- Create opportunities for children through a gift to the Morgan Community Fund
- A family fund so the next generation can continue a tradition of philanthropy in Appalachian Ohio to serve many more students
- Investments in education, art, and community nonprofits in Athens

Have you planned a gift to FAO or one of our funds? We'd love to hear from you. Call us at 740.753.1111 or email us at legacy@ffao.org.

THE PILLARS

Investing in *What's Closest To Your Heart*

The philanthropy gap tells us we need more grantmaking resources across Appalachian Ohio, and at FAO, we know the dollars that will make the biggest difference are those that are nimble enough to respond to urgent needs, expand the reach of effective programs to more people, and inspire innovative problem-solving.

While FAO invested more than \$2.4 million through grants and scholarships in 2017, more than 90% of this grantmaking was restricted by the boundaries of a specific geography, program, or scholarship. The next two stories highlight how FAO used the small amount of flexible funds at our discretion in 2017 to begin transformative initiatives.

FAO is proud of the way we have maximized modest dollars to facilitate groundbreaking change; however, our report would not be complete without also sharing that throughout 2017, FAO encountered worthy, promising, and highly impactful grant ideas every week that were not able to benefit from our investment because FAO lacked the funding to support them.

We are building the *Pillars of Prosperity* funds to change this. The Pillars are endowments to support region-wide grantmaking in five areas of need: Arts & Culture, Community & Economic

Development, Education, Environmental Stewardship, and Health & Human Services. As we build the Pillar funds, we are significantly increasing FAO's ability to respond to urgent needs, expand the reach of effective programs to more citizens, and inspire innovative problem-solving.

What most drives us to build the Pillar funds is the ingenuity, compassion, and talent of our region's changemakers and nonprofits. We also know the Pillar funds will serve as a great complement to the incredible work of other funds at FAO.

To encourage investment in FAO's Pillars, Ohio CAT is matching every gift dollar-for-dollar up to \$100,000 per Pillar. While this match lasts, donors have the unique opportunity of establishing a named fund within one of the five Pillar areas for half of what is usually required – a named fund can be established with a gift or multi-year pledge of \$5,000.

As we each give to the area we are most passionate about, our gifts will reinforce each other, combine with good work on the ground, and ultimately accelerate the pace of positive change within our region. So, *which Pillar is closest to your heart?*



Arts &
Culture



Community
& Economic
Development



Education



Environmental
Stewardship



Health &
Human
Services

BUILDING NONPROFIT CAPACITY THROUGH SOCIAL ENTERPRISE

During the Great Recession, the Meigs Council on Aging (COA) needed to find funding to keep its doors open. As the senior services provider for Meigs County, the Meigs COA had long provided meals to seniors at their senior center and through Meals on Wheels. To address their funding challenges, they decided to try selling homemade baked goods, an effort that soon grew into a catering service for area businesses and school personnel. Meanwhile, Meigs COA opened its Pomeroy cafeteria to serve the general public in addition to seniors.

Thanks to their leaders' novel approach and creativity, the Meigs COA did more than weather the Great Recession. Today, the catering services and public lunch options support the operations of the senior meals program and have helped the COA grow their services.

Throughout Appalachian Ohio, vital organizations like the Meigs Council on Aging frequently struggle to find the funding necessary for their mission. This is why in 2017 FAO launched a new social enterprise initiative from its Community & Economic Development *Pillar of Prosperity* Fund. This initiative aims to increase the capacity of nonprofits in our region through creative social enterprise activities like those of the Meigs Council on Aging.

Social enterprises are organizations using earned revenue reminiscent of business ventures to support the mission-driven work of the organization. Through this effort, FAO is working with others to help creative nonprofits receive the technical assistance they need to successfully bring their business ventures to fruition.

Through this effort, the Meigs Council on Aging is receiving coaching and assistance to plan for the expansion of its catering services, and even a restaurant, as it moves into its new location in the former Middleport High School building.



The Meigs COA now caters events, such as this Valentine themed event, to bring in revenue to support their mission.

STRONG PARTNERSHIPS AT THE HEART

FAO is piloting this work with partners to strengthen our region's nonprofits in their missions. Each partner brings its expertise to serve our nonprofits in the first five pilot counties – Athens, Gallia, Meigs, Perry, and Vinton:

- Voinovich School of Leadership and Public Affairs at Ohio University to provide technical assistance to social enterprises;
- Rural Action to provide first-hand knowledge of launching successful social enterprises and entrepreneurs;
- Parkersburg Area Community Foundation to provide foundation support in West Virginia; and
- Funding through the Appalachian Regional Commission's POWER Grant initiative.

DO YOU KNOW A POTENTIAL SOCIAL ENTERPRISE?
FAO is always looking for these creative organizations. Point us toward one you've heard about at 740.753.1111 or listening@ffao.org.



Students trained through Youth-Led Prevention meet with their representatives at the Ohio Statehouse.

TACKLING THE OPIOID EPIDEMIC WITH THE NEXT GENERATION OF LEADERS

It is no secret that our nation is struggling with an epidemic of unprecedented scale when it comes to opioid addiction and that Appalachian Ohio is in many ways the epicenter. This led FAO to give serious consideration to what role we could play in turning the tide and learned we are not alone. A number of partners have approached us to find out how they can work with FAO to help.

Over the past year, FAO has been working to identify what efforts are making a difference in our communities, what approaches work best for our young people, and where the biggest difference can be made, and discovered Youth-Led Prevention.

FAO will be working this year with a number of partners to expand the reach of Youth-Led Prevention efforts in our communities. Youth-Led Prevention empowers young people to not only be good decision makers themselves, but to lead prevention efforts. Working with data and guided by trained adult allies, the young people develop campaigns using evidence-based strategies designed for their local communities.

Through Youth-Led Prevention, we can not only empower our children of Appalachia to make community change themselves right now, but also to save lives.

RURAL AND URBAN TOGETHER

Generational poverty is an enormous barrier creating challenges across all five Pillars. And while we recognize the hurdles it creates for those living in Appalachian Ohio's 32 counties, we know well that our region is not alone. Generational poverty is generational poverty and whether you are living in rural poverty or urban poverty, you run into many of the same challenges trying to access opportunities.

In November, FAO and the Columbus Urban League announced a new and emerging partnership to identify the areas where working together might make a greater difference for those we serve. While there are clearly differences based on our distinct geographies and environments, we believe there is more in common and much to be gained from exploring how we can learn from each other and tackle large issues together.

Over the course of 2018, we will convene partners from our regions who can uncover shared areas of concern and help find the ways we might work together to address them.



Author J.D. Vance, FAO's Cara Dingus Brook, Columbus Urban League President and CEO Stephanie Hightower, FAO Board Member Jeffery Chaddock, and Franklin County Commissioner Kevin Boyce at Columbus Urban League's Empowerment Day luncheon. *Photo courtesy of Columbus Urban League.*



The Morgan County Community of the Arts helps children experience the thrill of music, art, and theater. Through a grant from FAO, they supported a range of art activities, including a summer production of *Annie*.

FUNDS

as of December 31, 2017

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
 The Morgan Community Fund

UNRESTRICTED FUNDS

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

DESIGNATED FUNDS

Kevin F. Arnold Memorial Fund*
 William M. and Janet P. Betcher Memorial Endowment for Library Services
The Chaddock Legacy Fund
 Margaret and Frances Channel Fund
 Connect Appalachia Broadband Initiative (CABI) Fund
 Gallia County Fair Relocation Fund
Holy Trinity School Endowment Fund*
 Leadership Guernsey Fund
Karr-Aanestad K9 Foundation Fund*

Nada Kerr Fund to Support Books for Kids in Athens County
Logan Kiwanis Club Endowment Fund*
 Tessa Logan Legacy Fund
 Perry County Historical and Cultural Arts Society Fund
William L. Phillips Fund
Rolling Hills Foundation Scholarship Program Fund*
 Southeastern Ohio Symphony Orchestra Endowment Fund
 Clovis and Ada Strausbaugh Fund

DONOR-ADVISED FUNDS

Cara and Dominick Brook Family Fund
 Chad Clay Memorial Fund
Families in Need – Opioid Crisis Fund*
 Gallipolis/Gallia County Bicentennial Fund
 Grandma's Gifts Fund
 Huffman Family Fund
 Christine Knisely Fund
 John and Char Kopchick Legacy Fund
Liggett Family Charitable 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 Fund
 The Saint Dymphna Fund
 The Scholl Family Foundation Fund

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

CORPORATE DONOR-ADVISED FUNDS

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

FIELD OF INTEREST FUNDS

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

Early Childhood Education Fund for Appalachian Ohio* East Guernsey Fine and Performing Arts 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
Guernsey County Drug Coalition Fund – CHOICES*
 Michele L. Hart Legacy Fund
 Dale Hileman Legacy Fund
 Bob and Ruth Holland Community Fund
 Hoops for Heart VFD Fund
 David Hostetler Legacy Fund
 iBELIEVE Foundation Fund
 iBELIEVE in Student Leadership Endowment Fund
 ICAN! Classroom Enrichment Fund

**Indicates the 20 new funds opened between January 1, 2017 and December 31, 2017. Italicized fund names indicate future funds to be created through planned gifts.*

FUNDS

as of December 31, 2017

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
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 Fund
Nicolozakes Trucking & Construction, Inc. Fund*
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 Fund
COAD Appalachian Development Fund
Earthtouch-Lou DeWein Conservation Stewardship 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
Habitat for Humanity of Southeast Ohio Endowment Fund*
HARP Mission Endowment Fund*
HAVAR Funds
Haven of Hope Endowment Fund
Miriam Hawes Legacy Endowment Fund for the Rolling Hills School District
Hocking Area End of Life Care Fund
Jewett United Methodist Church Endowment Fund
Kiwanis Coats for Kids Fund
Paul Knoop Conservation Education Fund for the Appalachia Ohio Alliance
Landrum Endowment Fund
Lewisville & Community Volunteer Fire Department Fund
Living Word Outdoor Drama Endowment Fund
Ohio Appalachian Collaborative 2.0 Fund
Perry County Sportsman Club Endowment Fund
Rural Action Fund for a Sustainable Future
Southeast Ohio Regional Medical Center – Guernsey Health Foundation
Stafford Cemetery Endowment Fund
Stuart's Opera House Endowment Fund
United Appeal for Athens County Endowment Fund
United Seniors of Athens County
United Way of Guernsey, Monroe, and Noble Endowment Fund*

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 '57 Scholarship
Cambridge Singers Scholarship
Jenny Cornelius-Woltz Memorial Scholarship
Corning Alumni Association 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 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
Loran and Shirley Stutz Scholarship*
Ariana R. Ulloa Scholarship
Janet Hursey Koehler Wade Scholarship
The Weissinger Family Memorial Scholarship
Jimmy Wood Memorial Scholarship*
Charles, Elizabeth, and Robert Woodruff Scholarship

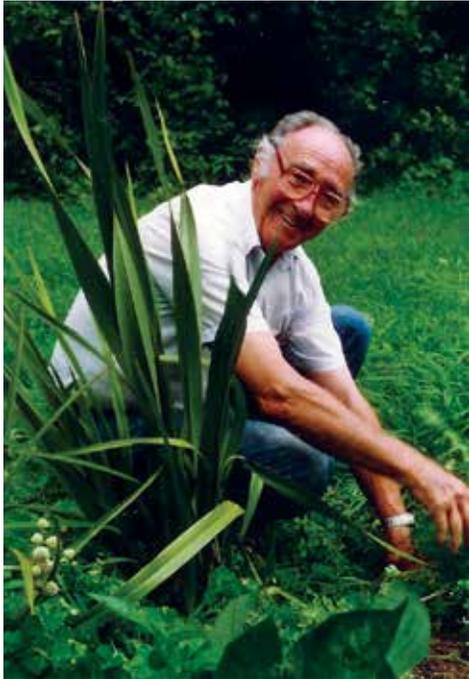
SCHOOL FUNDS

Batavia School Foundation Fund
Cambridge City Schools Alumni and Friends Educational Fund
Citizens for Rolling Hills School Fund
Friends of East Guernsey Education Fund
Goshen Education Foundation Fund
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.

Supporting Appalachian Ohio's Next Environment

In Appalachian Ohio, the name Ora Anderson is synonymous with protecting our natural environment. Ora is perhaps best known for his efforts to steward the recovery of vast areas of woodlands in southeast Ohio that became the Wayne National Forest. As a young reporter in Jackson County, Ora wrote about the creation of the forest during the Great Depression.



Over his 94 years, Ora planted tens of thousands of trees, promoted conservation education, and pursued his love of nature and the arts as an essayist, with his bird carvings, and as an advocate, working to spread a love of nature and the importance of conservation.

All of this passion is carried on through the Ora E. Anderson Scholarship Fund.

Created in 2007 by an anonymous donor, the Ora E. Anderson Scholarship

assists graduating seniors from among the 32 Appalachian Ohio counties who plan to pursue post-secondary studies associated with the natural sciences. Student majors and interests have

included forest and wildlife management, environmental restoration, natural and historical interpretation, ecotourism, and subjects associated with the protection of plants, animals, and the environment.

Since the Fund was created, it has awarded \$45,000 to students throughout Appalachian Ohio with plans to pursue careers associated with stewardship of the natural world. The Fund has awarded these scholarships while also growing from an initial gift of \$125,050 to nearly \$160,000.



Ora Anderson's legacy lives on every day through the scholarships awarded through this Fund – What legacies do you want to live on through future Appalachian Ohio students?

al Stewards – The Ora E. Anderson Scholarship Fund

Jacob Cruse and Samantha Wilson are first-year college students who credit the Ora E. Anderson Scholarship Fund for making their post-secondary education possible.

Jacob Cruse's love for the environment and the outdoors, combined with a desire to pursue a career that will bring him back to the region, led him to the field of environmental engineering. As an environmental engineer, Jacob will work to prevent, control, or remediate any hazards to the environment using engineering expertise and environmental science. A 2017 graduate of Eastern Local High School in Pike County, Jacob is currently studying environmental engineering at Shawnee State University.



Samantha Wilson has always felt most at home in the outdoors. Through hikes and other outdoor activities with her dad, she developed a passion for protecting our lands. That led her to pursue studies in biochemistry and soon environmental geoscience at West Virginia University. A 2017 graduate of Salem High School in Columbiana County, Samantha has already started working at the wildlife conservation lab at WVU with plans to do wildlife research for a governmental agency.



**FAO'S 2017
SCHOLARSHIPS
AT A GLANCE**

52
DONOR-ESTABLISHED
SCHOLARSHIP FUNDS

56 POST-SECONDARY INSTITUTIONS
ATTENDED BY FAO
SCHOLARSHIP RECIPIENTS

OVER **\$320,000** IN
SCHOLARSHIPS AWARDED

277 SCHOLARSHIPS AWARDED
TO APPALACHIAN OHIO
STUDENTS

SCHOOL ENDOWMENTS

Enriching Classroom Experiences through School Endowment Funds

What if high schools and elementary schools could benefit from the gifts of individuals like colleges and universities? What if alumni and people who love these schools could support the students and teachers through gifts?

That's exactly what school endowment funds at FAO are designed to do: support K-12 institutions with grants and scholarships for the students and teachers inside those buildings.

BATAVIA SCHOOL ENDOWMENT FUND

When the Batavia Local School District in Clermont County received a gift, they knew they wanted it to make a significant difference for a long time. The school district wanted to honor the donor's passion for supporting academics and the kinds of enriching opportunities that the district's students might not otherwise have. Through the creation of the Batavia School



Endowment Fund, the Batavia Local School District honors the donor's legacy while stewarding the dollars in a meaningful and lasting way.

In the few short years since the Fund was established in 2015, it has created opportunities and enrichment activities that would not have been possible through the normal school budget.

Already, the Batavia School Endowment Fund has:

- Sponsored a district-wide production of *Seussical the Musical*;
- Supported a field trip to the National Underground Railroad Freedom Center in Cincinnati;
- Invested in multiple programs rewarding positive student behaviors;
- Emphasized the power of reading and mentorship by supporting programs encouraging these activities; and
- Provided opportunities to engage in specific subjects like engineering and electronics.

Through these grants, students and teachers have benefitted from the innovation encouraged and supported by the Fund.

"These grants have added to the academic and social environment for the students in the district," said Jennifer Stewart, fund representative for the Batavia School Endowment Fund as well as a parent, community member, and staff member in the Batavia Local School District.

The partnership between the Batavia Local School District's Fund Committee and FAO allows both to focus on what they are best at. "The biggest advantage for us has been having FAO manage the Fund and take that burden off our plate. They have the experience to manage the fund while we focus on the grantmaking process and how and where the dollars are going in the district," added Stewart.

By working with FAO, the Batavia School Endowment Fund gives everyone who cares about Batavia schools the chance to lift up students with new opportunities to learn.

WEST UNION SCHOOLS ALUMNI & FRIENDS EDUCATIONAL FUND

Bill Riffle was stunned when a friend shared that over half of Adams County citizens used some sort of government assistance. As a 1953 graduate of West Union High School who had spent his boyhood in the community, he wanted to find a way to invest in West Union students to show them that their dreams are achievable. When he was writing a check to his college alumni association, an idea struck him – what if there was a way to write a check for students in his old school district too?

That's how the West Union Schools Alumni & Friends Educational Fund started. Created in 2008, Bill and others passionate about the Fund reached out to West Union alumni in the community, alumni who had moved away, and friends to support the Fund through gifts and pledges to invest in West Union students. Through face-to-face meetings with alumni, the Fund has grown to over \$100,000.

While it's been growing, the Fund's earnings have awarded nearly \$10,000 in grants and scholarships to support West Union students. All of these grants and scholarships have done one thing: help students in West Union succeed.



"If you can help one student in your lifetime succeed and then that student does that for someone else, you have had success," shared Bill. "Alumni can help and foster that success in their lives. We've made it. We can provide access to resources and opportunities to challenge and encourage their pursuit of big dreams for life success."

Are you interested in creating a school endowment fund to support the school or district closest to your heart? Please contact FAO at 740.753.1111 or email legacy@ffao.org to discuss how to invest in the dreams of current and future students. A complete list of the school endowment funds FAO works with can be found on page 11.

STARTING EARLY

How Our Youngest Children of Appalachia Can Make the Greatest Difference

Early childhood education is not simply a feel-good choice. It doesn't just warm our hearts to know children are better able to learn and become friends. It's one of the smartest economic decisions we can make because when our future workforce isn't ready to learn in kindergarten, then they, and their community are always trying to catch up.

That's why our children, especially those who are economically disadvantaged, need quality learning environments rich in language, encouragement, and exploration.



"We often hear that our children under five don't need to be in school," shared Maureen Boggs, the Early Childhood Education Division Director at the Corporation for Ohio Appalachian Development (COAD). "With today's understanding of brain development we know that school for our youngest children is hands-on. It's strategic, intentional play that takes their natural curiosity and turns it into the building blocks of learning for life."

Quality early childhood education has long-term effects on children's education, health, and future. Maureen has been a tireless advocate for our region's children and through a new

fund at FAO, she and COAD are bringing community partners together so we can all invest in our youngest children of Appalachia.

In a partnership between child-serving agencies across the region and Maureen's family, who have been supporting early childhood in honor of their parents, Walter J. and Marjorie G. McCarthy, in Washington County for many years, the Early Childhood Education Fund for Appalachian Ohio was created. Designed to serve the greatest early childhood education needs across the region, the Fund will make grants to programs that ensure a successful transition to kindergarten, support teachers and staff, and create greater access for children.



The promise of these grants is big. The return on investment in Ohio for every dollar spent on early childhood education has been found to be at least \$8.60 with some studies showing even greater returns. Federal Reserve studies have found there are fewer dollars spent on crime and greater future tax revenue from the earnings of children who had access to quality early childhood education.

At FAO, we believe in the children of Appalachia and their dreams. Our dreamers start small and we're grateful to Maureen and her partners who helped us all find a way to invest in their potential early.

NONPROFITS BUILD FOR THE FUTURE

Habitat for Humanity of Southeast Ohio Lays a Foundation of Sustainability

Habitat for Humanity of Southeast Ohio's business is community improvement through building and repairing houses for families in need. As a leading rural Habitat affiliate, the organization prides itself on being innovative. That flair for innovation was central as Habitat launched its capital campaign to not only build new headquarters today, but to plan for the future.

Habitat's campaign will lead to a new headquarters in Chauncey to help the organization serve citizens and communities in Athens, Hocking, Meigs, Morgan, Muskingum, Noble, and Perry counties through expanded office space, a construction warehouse, a storage space for equipment and donations, and a volunteer and family training center. But Habitat's vision of service is far-reaching, which is why the campaign also includes the development of a more than \$1 million Habitat for Humanity of Southeast Ohio Endowment Fund at FAO to provide sustainable dollars to maintain its new headquarters and mission for years to come.

"By working with FAO, we can rely on their expertise and experience managing funds and working with donors to make more complicated gifts, allowing Habitat to focus on our mission and what we are best at," said Kenneth Oehlers, executive director of Habitat for Humanity of Southeast Ohio.

Habitat understood FAO's role in supporting Appalachian Ohio's nonprofits. With an endowment fund at FAO, nonprofits can rely on the Foundation to manage and invest the funds for long-term growth and sustainability, while the nonprofit can concentrate on its mission and also offer donors an additional option to make a difference.

"Nonprofits should incorporate endowment into their long-term funding plans. While a nonprofit might not be able to fully fund an endowment immediately, it's great to start one to provide that option to your donors and continue to build those resources over time," said Ken.



FAO works with nonprofits on funds that support sustainability and grow permanent funds for their missions while providing investment expertise and the capacity to receive more complex donor gifts, like annuities.

To learn more about how the nonprofit closest to your heart and FAO might be able to partner, please contact FAO at 740.753.1111 or legacy@ffao.org.

MAPPING OUR IMPACT

Thanks to donors throughout Appalachian Ohio and beyond, FAO has nearly tripled the dollars it has awarded in grants and scholarships since 2014. In 2017, FAO awarded more than 500 grants totaling over \$2.4 million.

Here are just five stories highlighting our continued growth in grantmaking in 2017.



ROSS COUNTY:

Nature has become the classroom for students at Bishop Flaget School in Chillicothe. With the development of an outdoor classroom, the students are studying birds and growing a sustainable habitat for Appalachian Ohio wildlife.

SCIOTO COUNTY:

Tyler McCormick dreams of becoming a math and science teacher in his home county of Scioto. With a Bob Evans and Wayne White Legacy scholarship, he's studying to do just that at Marshall University.

COLUMBIANA COUNTY:

Columbiana County is looking to its own young people to serve as leaders. Through a county-wide leadership program, high school students are learning leadership skills while giving back through community service.

NOBLE COUNTY:

Incarcerated individuals at the Noble Correctional Institution foster and train abandoned dogs to better prepare them for loving families through the Cell Dog program.

PERRY COUNTY:

Shawnee is building a healthier community with health and wellness classes designed for all ages. Ranging from healthy snacks and nutrition to exercise options, the classes have the future of the community and its citizens in mind.



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 address the region's greatest needs and advance programmatic initiatives in the *Pillars of Prosperity* areas while FAO is building the permanent endowments 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.

NEW FUNDS

FAO welcomed 20 new funds in 2017.

DESIGNATED & ORGANIZATIONAL FUNDS TO SUPPORT SPECIFIC NONPROFITS

The **Kevin F. Arnold Memorial Fund** will support the Washington County OSU Extension Office and its work to provide leadership and learning opportunities for youth, with priority to supporting student participation in summer leadership camp.

The **Habitat for Humanity of Southeast Ohio Endowment Fund** supports Habitat for Humanity of Southeast Ohio and its mission to build strong and stable communities across Southeastern Ohio, including general operations, equipment purchases, and staff and program development.

The **HARP Mission Endowment Fund** supports HARP Mission and its work to provide spiritual and physical assistance to people in need, including families who are victims of natural disasters, poverty, domestic violence and child abuse, and other traumas such as unemployment that negatively impact daily living.

The **Holy Trinity School Endowment Fund** will support the Holy Trinity School in Somerset, including programs and activities that promote and/or maintain the school.

The **Karr-Aanestad K9 Foundation Fund** supports the unique purpose of the Ohio

Department of Natural Resources Division of Wildlife's K9 program and its work to promote and protect Ohio's fish and wildlife resources.

The **Logan Kiwanis Club Endowment Fund** supports the Logan Kiwanis Club and its charitable activities to benefit the Logan, Ohio area.

The **Rolling Hills Foundation Scholarship Program Fund** supports the Rolling Hills School District and its scholarship program.

The **United Way of Guernsey, Monroe, and Noble Endowment Fund** will support the United Way of Guernsey, Monroe, and Noble Counties and its mission to improve the quality of life for those in need by focusing on impact areas of education, health, and financial stability.

DONOR-ADVISED FUNDS TO ASSIST DONORS IN CONTINUED CHARITABLE GIVING

The **Families in Need – Opioid Crisis Fund** will show a preference for those organizations supporting Appalachian Ohio families and child support services working in relation to the opioid crisis.

The **Liggett Family Charitable Fund** will assist the Liggett Family in partnering with FAO to

create opportunities through grants.

The **Strickmaker Family Fund** will assist the Strickmaker Family in partnering with FAO to create opportunities through grants.

The **Susan Fund**, an endowed donor-advised fund created through a future planned gift.

FIELD OF INTEREST FUNDS FOR A SPECIFIC CHARITABLE PURPOSE

The **Antrim Community Cemetery Association Endowment Fund** will provide funds to maintain, repair, and restore semipublic areas, abandoned or deteriorating graves, and headstones of historical or architectural significance to the community.

The **Early Childhood Education Fund for Appalachian Ohio** is designed to support the healthy development and future success of Appalachian Ohio's youngest children through early childhood education.

The **East Guernsey Fine and Performing Arts Fund** will support teachers in the East Guernsey Local School District in implementing fine and performing arts activities and programs.



The Karr-Aanestad K9 Foundation Fund will support Ohio Department of Natural Resources Division of Wildlife K9 officers like Mattis and his handler Chris Gilkey. Photo courtesy of ODNR.

The **Guernsey County Drug Coalition Fund – CHOICES** will support the Guernsey County Drug Coalition through the CHOICES (Community, Hope, Opportunity, Independence, Change, Empowerment, and Success) program.

The **Nicolozakes Trucking & Construction, Inc. Fund** is a part of the Environmental Stewardship *Pillar of Prosperity*.

SCHOLARSHIP FUNDS TO CREATE OPPORTUNITIES FOR STUDENTS

The **Corning Alumni Scholarship Fund** will provide scholarships to graduates of Miller High School in Perry County pursuing post-secondary education through trade programs and certificates, associate degree programs, and four-year institutions of higher learning.

The **Loran and Shirley Stutz Scholarship Fund** provides scholarships to graduating seniors, including homeschooled students, from the East Guernsey Local School District in Guernsey County to pursue post-secondary education.

The **Jimmy Wood Memorial Scholarship Fund** provides scholarships to graduating New Lexington High School students who have participated for at least three years in FFA, 4-H, or athletics to pursue post-secondary education.



HARP Mission volunteers build a wheelchair ramp for a homebound senior citizen.

FUND SPOTLIGHT: Help When Appalachians Need It Most

More than once, HARP Mission has heard the story of someone who can't get in and out of their own home because of their wheelchair. That's when HARP, which stands for Helping Appalachian Rural People, launches into action, marshaling volunteers and materials to build a home wheelchair ramp. And that's just one of the many things this organization does to help low-income senior citizens, disabled veterans, and impoverished children throughout Appalachian Ohio.

With programs ranging from job training and basic needs to disaster response, HARP reaches families when they need help most. In 2017 alone, they assisted over 90 local families and provided 15 supply trucks to those affected by Hurricanes Harvey and Irma.

Through the new HARP Mission Endowment Fund, HARP's staff and volunteers will be able to grow the funds essential for their work to continue and to expand. By partnering with FAO, their donors will also have new ways to give more complex gifts like stock, bequests, and property.

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Clyde Gosnell, Robert H. "Tad" Jeffrey, Tom and
Joyce Johnson, Jennifer and David Simon, and
Louise "Omie" Warner

Shareholders have given unrestricted gifts
of \$32,000 or more to FAO's mission.
* Denotes a gift of more than one share.

We are grateful for your gifts every day and so are our grantees and scholarship recipients, whose notes you can read here!

Foundation for Appalachian Ohio,

Thank you so much for selecting me to receive the Jennifer Garrison Public Service scholarship. I am honored that I was chosen out of the many applicants. This award will help my family and I fund my education at the University of Akron, at which I will major in Marketing Management. Once I graduate, I'll have my Bachelor's of Business Administration, and I plan to eventually earn my Master's.

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... give back and
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Sincerely,

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... assistance. I am looking
... beginning a new chapter
... greatly reduced some of my borders and has a
... focus on this next adventure with more confid
... ease of mind.

Because I don't accept this scholarship lightly from you, I plan on working hard, doing my best, and enjoying every moment at YSU! Again, I greatly appreciate this generous award.

Dear Scholarship Committee:
Thank you for selecting me as an award winner for the Lester + Theima Ellwood and the Guernsey County Educational Assistance Grant. These scholarships will help me achieve my goal of becoming a nurse. The Foundation for Appalachian Ohio has been such a great support throughout my college years. Thank you all for your kindness and God Bless all of you!

Dear Foundation for Appalachian Ohio,
I was a scholarship recipient in 2015. I just wanted to write and say that college is going great! I am currently in my 4th Semester at the University of Mount Union's Nursing Program. So far I have made the Dean's List twice and hopefully again this Semester. I have recently been thinking about applying for the Honor's Program and adding a minor in biology. I am in a microbiology course this Semester and I LOVE IT! Since starting this class I have been looking into specializing in Infectious Disease. I am also in the process of applying for a Nurse Internship at a local hospital. Thanks again for selecting me as a recipient back in 2015.

... underground Railroad
... all trip for April 30, 2018.
... this would not have been
... possible without the grant
... provided us. ☺

August 24, 2017
Dear Foundation for Appalachian Ohio and Southern Perry County Academic Endowment Fund,
I would like to personally thank you for selecting me as a recipient of the Jesse, Glenn, & Ralph Drake Scholarship and the Paul & Charlotte Hope Scholarship. Your generosity continues to amaze me as you have provided me with various scholarships over the past several years. With these scholarships, I have been able to obtain my Bachelor's of Science of Environmental Health Sciences from Ohio University. Now as I am starting graduate school at The Ohio State University, tuition and living expenses are a major burden for me. But once again, your Foundation has graciously given me more scholarships to help me along my pursuit. Without organizations like the Foundation for Appalachian Ohio and the Southern Perry County Academic Endowment Fund, my career ambitions are simply not possible. Thank you again.

... The Live Today. Show
... tomorrow grant for
... less show will
... wide so many students
... need with warm and
... dry shoes!

THANK YOU to all who volunteered their time and talent in 2017:

- Debbie Adam
- Ada Adams
- Jean Andrews
- Darnita Bradley
- Karey Boals
- Tom Bork
- Jessica Branner
- Colleen Bullett
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STATEMENTS OF FINANCIAL POSITION
HISTORICAL COMPARISON

	December 31, 2017 Unaudited	December 31, 2016 Audited	December 31, 2015 Audited	December 31, 2014 Audited	December 31, 2013 Audited
ASSETS					
Cash and Cash Equivalents	\$ 3,286,637	\$ 3,064,214	\$ 2,163,415	\$ 1,901,421	\$ 1,665,382
Investments	23,838,942	20,902,196	17,388,478	16,756,856	13,028,613
Pledges Receivable and Other Assets	801,205	1,120,141	1,398,104	1,533,290	166,734
Property and Equipment, net	982,895	501,824	535,166	559,309	589,234
TOTAL ASSETS	\$ 28,909,679	\$ 25,588,375	\$ 21,485,163	\$ 20,750,876	\$ 15,449,963
LIABILITIES AND NET ASSETS					
LIABILITIES					
Liabilities	\$ 165,901	\$ 286,199	\$ 85,656	\$ 124,058	\$ 50,679
Organizational Funds Held for Others	3,438,999	3,330,185	2,035,545	1,852,481	1,815,798
TOTAL LIABILITIES	3,604,900	3,616,384	2,121,201	1,976,539	1,866,477
NET ASSETS					
Current					
Operating	2,624,701	2,605,955	2,901,641	3,183,641	2,434,474
Donor-Advised and Designated	3,486,782	2,447,333	2,660,298	3,304,735	2,810,133
Board Designated					
Operating Reserve	1,993,660	1,377,931	1,389,512	1,333,208	-
Operating Endowment	927,449	767,481	794,831	801,990	748,752
Endowments					
Pillars of Prosperity	351,604	299,204	115,989	14,923	-
Scholarships	6,405,263	5,410,467	5,132,133	5,188,840	4,214,575
Donor-Advised and Field of Interest	6,619,546	5,608,539	4,136,644	3,045,977	1,701,836
Designated	1,634,690	2,281,529	1,075,322	802,592	596,758
Other Grantmaking Funds	1,261,084	1,173,552	1,157,592	1,098,431	1,076,958
TOTAL NET ASSETS	25,304,779	21,971,991	19,363,962	18,774,337	13,583,486
TOTAL LIABILITIES AND NET ASSETS	\$ 28,909,679	\$ 25,588,375	\$ 21,485,163	\$ 20,750,876	\$ 15,449,963

OUR TEAM

CONTACT US

Foundation for Appalachian Ohio • PO Box 456 • 35 Public Square • Nelsonville, OH 45764
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