

Growing Home GAZETTE

FALL | 2016



A NEWSLETTER OF THE FOUNDATION FOR APPALACHIAN OHIO

A VISIONARY GIFT AND A CHALLENGE

On a warm September evening, there was magic in the air. Friends of FAO gathered together to celebrate another successful year and to hear a major announcement.

FAO Board Member Jeff Chaddock and his partner, Mark Morrow, announced they will give 97% of their estate to benefit nonprofit organizations in Appalachian Ohio.

Jeff's love for the region – he is a native son of Belpre in Washington County – led him to FAO. With FAO, Jeff and Mark found a philanthropic partner to support the causes and institutions they're passionate about for generations to come.

Jeff's motivation to plan this transformational gift came from his daily work. As a financial advisor, Jeff often speaks with clients about what he calls the "eulogy test," which means asking ourselves a simple question: *what do we want those who love and know us to say about us when we're gone?*

"A eulogy should reflect your passion, your obsession, your drive," says Jeff. Envisioning your own eulogy can help you decide how to spend money today and how to invest for the future. Ultimately, the eulogy test can help us plan our legacies.

"I don't care how large or small the amount, to orchestrate your estate planning and your giving is critical," says 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?"

Jeff has helped many clients leave a legacy far beyond what they initially imagined possible through estate

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Jeff Chaddock and Mark Morrow announce that they will give 97% of their estate to FAO to benefit regional nonprofits. (Courtesy of Kellogg Photography)

Beneficiaries of the Gift

One of the things Jeff and Mark loved about working with FAO was the one-stop planning approach. Through one estate plan, Jeff and Mark will support all of the organizations they hold closest to their hearts, 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

FAO will also receive the historic Zenner House in Athens, which will serve as a center for events, retreats, and meetings as well as honoring philanthropists and emerging leaders in the region, in part through the Chaddock Award for Philanthropist of the Year.

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A VISIONARY GIFT AND A CHALLENGE

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Attendees gather outside the historic Zenner House, which will be gifted to the Foundation for Appalachian Ohio through this planned gift. (Courtesy of Kellogg Photography)

planning. "By planning for gifts through your will or trust, the integrity of your life is not broken by death. Your life's work and passion do not have to stop."

Jeff was inspired to publicly announce his planned gift because he hopes it will encourage others to act as boldly as he has in their own gift planning while spurring FAO's aspiration to build a strong pipeline of planned gifts to benefit Appalachian Ohio.

As he pledged his gift, Jeff challenged FAO to swiftly move forward promoting planned giving and encouraging donors in leaving legacies. "FAO offers all of us a kaleidoscope of unlimited opportunities and ways to give. It's the perfect one-stop partner to reduce stress about giving and support all of our passions with one plan."

Jeff went on to say, "Our communities and nonprofits need FAO to become an even more active force in encouraging everyone to be thoughtful about estate planning, and they need all of us to rise to the challenge with our gifts. For those who can, I challenge you to consider leaving 51% or more of your estate to charity."

In response to Jeff and Mark's gift and challenge, FAO Board Chair Ron Strickmaker said, "We at FAO are stunned by the generosity of this gift from Jeff and Mark, and we whole-heartedly embrace their challenge for FAO to play an even greater leadership role in inviting others to make planned gifts benefitting the children of Appalachia."

APPLYING THE EULOGY TEST TO YOUR GIFT PLANNING –

"What do you want those who know and love you to say about you when you're gone?"

FAO's staff team is always ready to support you in preparing confidential and no-obligation plans reflecting your dreams and goals for your legacy. We understand your plans may change as things change in your life, and we are ready to support you as you make modifications.

When you contact FAO to discuss your dreams, we will start by listening to "what's closest to your heart." If you need help with the discernment process, we can share questions to guide you in your journey.

After identifying what's closest to your heart, we will study how:

- Gifts of particular assets might benefit your financial goals, including gifts of cash, securities, business and partnership interests, real estate, personal property, life insurance and retirement assets; and how

- Particular giving strategies might provide financial benefits, streams of income, and tax advantages now and in the future.

As a result of planning a legacy, you may encounter unexpected benefits including the:

- Excitement of giving more to your favorite charity than you ever thought possible;
- Peace of mind from getting affairs in order;
- Satisfaction from honoring the legacy of someone who has made a difference to you;
- Joy in being part of a larger community of visionary givers making a transformative difference; and the
- Satisfaction and ease of using FAO as a trusted, one-stop partner to support all the charities you love.

To start a conversation about your legacy, please contact FAO at 740.753.1111 or legacy@ffao.org.

INSPIRED BY NATURE, BILL PHILLIPS MAKES PLANS TO GIVE BACK

Bill Phillips's love of the Hockhocking Adena Bikeway started years before he moved to the Hocking Hills. Now, it will continue for generations to come through a gift to FAO that he's planned in his will.

"I thought I would help other people enjoy what I have enjoyed."

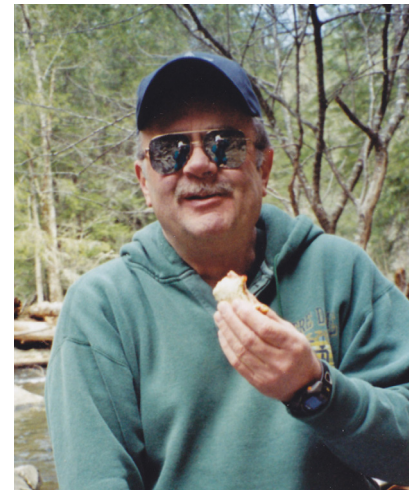
While Bill lived in Columbus and worked as a genealogist, he would come to the Hocking Hills to enjoy the landscape and the pace of life. While touring the countryside in 1985, he saw a for-sale sign on a property and decided to look into it. Within a few weeks, he owned the property and two years later, Bill stopped commuting to Columbus for his research and became a full-time merchant with the creation of a windchime shop that soon expanded into a Christmas and candle shop, now mainstays serving visitors to the Hocking Hills.

As first a visitor and later a community member, Bill enjoyed spending time on the bike trail that spans from Nelsonville to Athens.

"It's fun," he said. "It promotes good health and is a good way to relax. And the scenery along the bike path is outstanding."

In the bike path, he found a place where community members and visitors could enjoy the outdoors, test

their physical limits, and explore their gratitude for the gifts of nature and their ability to enjoy it. He wanted to share the experience with others, so he captured his feelings for the bike path in a poem. He wrote of the people he would encounter on his travels down the trail and how the trail inspired us all to "appreciate what we have."



Bill Phillips enjoying time on the Hockhocking Adena Bikeway

It should come as no surprise that as Bill was planning his estate with his attorney he was looking for a chance to give back by investing in the bike path.

"I don't have any descendants of my own...I thought I would help other people enjoy what I have enjoyed."

It was then that Bill's attorney suggested opening a fund with the Foundation for Appalachian Ohio with a gift in his will. Knowing FAO's mission of creating opportunities in Appalachian Ohio and expertise in honoring donors' wishes for generations, Bill's attorney began working with FAO and introduced Bill so a fund could be created to support what is closest to his heart, the Hockhocking Adena Bikeway.

(The Hockhocking Adena Bikeway photograph below is courtesy of Joel Prince, Athens County Convention and Visitors Bureau.)

EXCERPT FROM "THE BIKE TRAIL" BY W. LOUIS PHILLIPS

... Yet further down the trail, all of this on the same day mind you,
I encountered a one-armed cyclist going the opposite direction,
Pedaling as happy as a lark, no trouble steering,
Not letting his disability interfere with enjoying the trail.

What tragedy had taken his arm?
Afghanistan, Iraq, cancer, a drunk driver?
Whatever, he was active. He was participating.
He probably had a lot in common with the man on crutches.

And lastly, I encountered a healthy young man afoot,
Well-built, handsome, jogging briskly, effortlessly,
Did he have any idea how fortunate he was to be whole?
Had he seen the man on crutches, the one-armed cyclist?...

The full poem can be found on FAO's website and in W. Louis Phillips's *More Hill Country Poetry* (2015).

EVERY SCHOLARSHIP, AN OPPORTUNITY

In 2016, FAO awarded 262 scholarships to support our region's students. Every scholarship awarded honors a unique legacy and empowers each student who receives a scholarship to create their own legacy.

LOGAN

The Agricultural Economist

SCHOLARSHIPS

Dr. Allen Smith Memorial Scholarship; Bob Evans and Wayne White Memorial Scholarship

RESIDENCE
Jackson County

FUTURE GOAL
To empower people to live independently through sustainable agricultural practices.

HIGH SCHOOL
Jackson High School

COLLEGE
The Ohio State University



TYLER

The Conservationist

SCHOLARSHIP
Forrest Bachtel Scholarship

RESIDENCE
Meigs County

FUTURE GOAL
To protect nature so future generations can experience it.

HIGH SCHOOL
Meigs High School

COLLEGE
Hocking College



WHAT PHILANTHROPY MEANS TO LOGAN

Giving. Whether of your time and efforts, everyone has something to teach and share with others.

WHAT PHILANTHROPY MEANS TO TYLER

Opportunity. It gives others the chance to make something of themselves to one day do the same for others.

EACH STUDENT, A DREAM TO HELP OTHERS

No matter what their field of study we take pride in our recipients and the story behind each scholarship fund. The **Foundation for Appalachian Ohio** is honored to support 46 donor-established scholarship funds.

SHELBY

The Social Worker

SCHOLARSHIP

Bob Evans and Wayne White Memorial Scholarship

RESIDENCE

Perry County

HIGH SCHOOL

Crooksville High School

COLLEGE

Ohio University – Zanesville

FUTURE GOAL

To help people at the margins – whether elderly or children in foster care – live their best lives.



TYLER

The Doctor

SCHOLARSHIP

AK Steel Foundation Scholastic Scholarship

RESIDENCE

Guernsey County

HIGH SCHOOL

John Glenn High School

FUTURE GOAL

To provide kids in need with the medical care they deserve.

COLLEGE

The Ohio State University



WHAT PHILANTHROPY MEANS TO SHELBY

Empowerment. Giving helps provide everyone with equal opportunities and helps me to do more of what I want to do.

WHAT PHILANTHROPY MEANS TO TYLER

A leg up. Philanthropy helps people who are disadvantaged to get ahead. Without it, it would not be possible for me and others like me to pursue and achieve our dreams and goals in life.



OHIO CAT PARTNERS TO BUILD PROSPERITY

We all know Ohio CAT is in the business of helping people build things. We've seen the trademark CAT® yellow machines on our highways, at construction sites for future schools and hospitals, and where homes



Ken Taylor of Ohio CAT presents a check to FAO's Cara Dingus Brook.

are being built for families. Ohio CAT has a long tradition of helping people build something new from the ground up, including prosperity in Appalachian Ohio through a gift to FAO.

With a \$1 million gift to FAO designed to address Appalachian Ohio's philanthropy gap, Ohio CAT made an investment that is

changing philanthropy in our region today and creating opportunities for future generations.

Having just celebrated its 70th anniversary, Ohio CAT has always been guided by a commitment to being an asset in the communities where it operates.

When Ken Taylor took the helm at Ohio CAT as President, he wanted to establish a philosophy behind Ohio CAT's philanthropy and was drawn to landmark projects like FAO's IPO and **Pillars of Prosperity**.

“There's always been philanthropy in and around my family,” says Ken. “It's important to me that Ohio CAT be an asset in our communities now and that we do so in ways that will last.”

Half of Ohio CAT's gift will be used to match the first \$100,000 given to each Pillar dollar-for-dollar, doubling the impact of each gift made to the **Pillars of Prosperity**.

BUILDING THE PILLARS OF PROSPERITY

FAO launched the **Pillars of Prosperity** as part of our \$100 million campaign to build new philanthropic resources for the region. A key part of our Pillar strategy is the identification of and investment in bright spots throughout the region. Bright spots are promising projects with the potential to expand their impact in communities across Appalachian Ohio.

An example of this is a recent \$1,000 grant to support the creation of a public-private partnership to bring dental care access to 1,800 students in a Perry County school district. We are now studying how the program might be expanded to more schools not only within Perry County, but throughout Appalachian Ohio.

By investing in FAO's Pillar funds – **Education, Health & Human Services, Community & Economic Development, Arts & Culture, and Environmental Stewardship** – we can accelerate transformations across Appalachian Ohio by ensuring good ideas and programs expand to reach more citizens.



To jumpstart FAO's progress building the **Pillars of Prosperity**, Ohio CAT has committed to match dollar-for-dollar each gift to one of the Pillar funds, up to \$100,000 per Pillar. The Education Pillar has already met its match – **which Pillar will be next?**

Because of the Ohio CAT match, any named endowment fund under a Pillar can be created for only \$5,000 instead of the usual \$10,000. These funds, like the David Hostetler Legacy Fund in the Arts & Culture Pillar, honor a legacy and continuously impact future generations.

KEEPING UP TO DATE WITH FAO

We hope you'll stay in touch with FAO throughout the year with:

www.AppalachianOhio.org

Find all the latest news, stories, and videos on our website.

eNews

Sign up on our homepage to have quarterly stories emailed to your inbox along with news of events as well as scholarship and grant opportunities.

Facebook

Like our page, stay up to date, and join the conversation.

Annual Report

Our valentine to the region lands in mailboxes every February.

Legacy Reception

Join us on October 25th in Jackson County at the newly restored Markay Cultural Arts Center for an evening of community awards, scholarship stories, food, and company. Email rsvp@ffao.org to RSVP.



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Learn more about our Board of Directors and Staff Team at www.AppalachianOhio.org/WhoWeAre

In addition to FAO's Board, our work is guided and supported by more than 100 volunteers who represent the broad diversity of our region. You can read more about one of our volunteers, John Lyons, by visiting www.AppalachianOhio.org. If you would like to make a difference in Appalachian Ohio by volunteering with FAO please contact us at 740.753.1111





A GRANTMAKING MILESTONE

FAO is pleased to announce that since our *Initial Philanthropic Offering (IPO)* in November 2014, we have made over 1,000 grants to nonprofits, schools, and public organizations throughout our region. These grants impact projects and programs across all five **Pillars of Prosperity** and communities throughout our 32 county region.



This milestone includes our first Education Pillar grants to **Easy as Pi** and the **iBELIEVE Foundation** to support the expansion of Easy as Pi in eastern Ohio and to ensure the long-term sustainability of the iBELIEVE Foundation through the creation of an endowment fund for the organization.

If you know of projects and programs in our region with potential to be scalable, sustainable, and ultimately transformative, we want to hear about them. Please reach out to 740.753.1111 or email listening@ffao.org to share your ideas or to learn more about how you can impact lives in our region.



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