

# HARRISON COUNTY CHAMPION LEAVES LEGACY OF DEVOTION TO COMMUNITY

Although Marcia Bedway originally intended to return only temporarily to her hometown of Cadiz, Ohio, she soon discovered a powerful sense of community and belonging in the Appalachian town. Marcia, a renowned businesswoman, came to dedicate herself to her community in Harrison County through regular volunteer service. This included giving her



Marcia stitched family history into her quilts; this Cedars of Lebanon design was made for her sister Andrea and presented at Christmas, 1989.

time to the annual Christmas parade, the garden club, and the Cadiz Business Association. Her dedication, combined with her warmth and gentle spirit, led one of her fellow community members to describe Marcia's return as a "breath of fresh air."

Marcia loved participating in something larger than herself by supporting her community. That's why, as it came time for her to consider estate planning, she wanted to find a way to serve her community beyond her lifetime, in perpetuity.

When Marcia passed away in 2017, she left a gift to continue her work of making a difference in Harrison County.

<sup>66</sup>Our family didn't know that Marcia had left a gift to the Harrison County Community Foundation, but none of us were surprised," said Barbara Bedway, Marcia's younger sister. "She loved this community, and it makes sense that she would find a way to leave the kind of legacy that would help nurture and sustain it well beyond her lifetime. Her generosity was always inspiring."

#### **Continued on Page 2**

#### IN THIS ISSUE:

 NONPROFITS FIND NEW PATHS TO SUSTAINABILITY......3 BRINGING YOUTH VOICES INTO SUBSTANCE USE PREVENTION. . . 6  How Retirement Funds Can Make a Difference Today. . 7 Marcia's gift benefits Harrison County through the Harrison County Community Foundation (HCCF) at the Foundation for Appalachian Ohio (FAO). Founded in 2012 to create opportunities throughout Harrison County by investing in the county's nonprofits, schools, and communities, the HCCF was an excellent fit for Marcia, whose love for and roots in Harrison County ran deep.

With a gift in her will Marcia ensured that the good work she did throughout Harrison County would stretch far beyond her lifetime, allowing the HCCF to continue that work on her behalf. And that's part of why the HCCF was created: to give more people who love Harrison County the ability to give back. The option to leave a bequest through one's will is often an easy way to do just that.

Before the establishment of the Harrison County Community Foundation, many charitable gifts were leaving the community. Residents who wanted to give back to the community had to identify partners for help. Today, HCCF offers community members like Marcia the ability to give locally.

Through her will, Marcia will make a difference in Harrison County with each grant the HCCF makes

In 2006, Marcia received the Award of Excellence at the Cadiz Community Recognition Banquet for her contributions to the development and improvement of Sally Buffalo Park.



moving forward. Because her gift was committed through HCCF's Puzzle for Prosperity campaign, it will be endowed to make grants forever.

Today, the HCCF is able to make about \$1,000 in grants annually and they ensure these small dollars make a powerful impact. Grants have helped send every child in grades K-3 home with books for the summer so they could keep learning all year long, provide eyeglasses to students with families facing financial hardship, and support the delivery of care packages for troops overseas. **So, imagine what \$40,000 in grants per year could make possible.** 

That's the goal of the Puzzle for Prosperity campaign — to raise \$1 million in endowment funds by 2022 so that more than \$40,000 per year can be invested in Harrison County. This amount will only increase as the endowment grows through investment and additional gifts. These dollars, Marcia's gift included, will directly support a variety of projects advancing arts and culture, community and economic development, education, environmental stewardship, and health and human services in Harrison County.

"Marcia was a champion for her community, who understood that if this region is going to advance, it's going to require the generosity and commitment of its residents," said John Tabacchi, a Cadiz-based lawyer who knew Marcia all her life and worked with her to draft her will. "Marcia wanted to leave a gift that was flexible, broad in scope, and able to benefit her community directly. As a fund representative for the Harrison County Community Foundation, I suggested the HCCF, and it turned out to be a great match. By leaving a planned gift with the HCCF, Marcia was able to build upon her commitment to her community by helping to ensure that Harrison County has the resources necessary for success."

In this way, Marcia's legacy of generosity will continue to provide a "breath of fresh air," inspiring growth and positive change at the local level.

#### **EXTENDING HER REACH** Barbara Bedway on Her Sister's Legacy

"It's true you could mark the seasons by my sister's volunteer projects: the community sidewalk sale in spring; the Cadiz Business Association booth at the county fair in summer; Sally Buffalo Days in fall; the Christmas parade in December. What linked all these projects was her desire to help nurture and sustain the lives of those in her beloved community of Harrison County, and its sister counties.

My siblings and I were greatly moved to learn she had left in her will a bequest to the Harrison County Community Foundation. In this way, Marcia continues to be a benevolent presence in her community, and to extend the reach of her profound compassion and love." —Barbara Bedway

Read Barbara's full essay on her sister's gift at www.AppalachianOhio.org/HCCF.

# PLANTING COURAGE IN APPALACHIAN OHIO



t takes courage to consider what kind of legacy you want to leave behind. Sometimes it takes courage for a nonprofit to approach the subject of estate planning with a donor. But an anonymous donation to the Foundation for Appalachian Ohio has planted the seeds for a blossoming of courage in the region – and those seeds are starting to sprout.

By matching each committed planned gift with \$10,000 allocated immediately, Planting Courage has not only given nonprofits the opportunity to grow their endowment more swiftly – it's also given donors the chance to see their commitment of a planned gift for the future make a difference today, too.

This year, Planting Courage launched with five nonprofit endowment funds at FAO, supporting: the Friends of the Hocking Hills State Park Educational Endowment, the Habitat for Humanity of Southeast Ohio Endowment Fund, the Stuart's Opera House Endowment Fund, the Morgan Community Fund, and the Foundation for Appalachian Ohio Endowment Fund.

"Planned giving is the form of philanthropy that is most accessible to the widest range of people and allows for the most flexibility," said Ken Oehlers, the Executive Director of Habitat for Humanity of Southeast Ohio. "Yet it can be difficult to have important conversations about planned giving, particularly because people don't traditionally see the impact of their donations during their own lives. Thanks to the Planting Courage campaign, however, talking about planned giving has never been easier, and we are starting to see more people take that bold leap with us as a result."

Since the launch of Planting Courage earlier this year, 13 planned gifts have been pledged to the various endowment funds so far.

Because these gifts support endowment funds, the impact of Planting Courage will be far greater than the sum of its parts.

"We have been discussing the benefits of planned giving for years, but the Planting Courage campaign motivated us to implement it in our fundraising," said Tim Peacock, executive director of Stuart's Opera House. "We have tried to establish a very holistic donating cycle for our passionate donor-base, which begins with attending an event, growing into membership, and eventually sustained donations. Planned giving really completes that cycle, so it could really change everything for us, and make everything we do so much more attainable."

Due to the resources Planting Courage has brought participating organizations, and is poised to bring those organizations moving forward, FAO is hoping to grow the pilot to work with more nonprofit endowment funds through our Community & Economic Development Pillar of Prosperity Fund. We are currently seeking matching funds for the next phase of the campaign to ensure that FAO can continue to inspire courage in those across the region who hope to make a legacy of lasting impact.

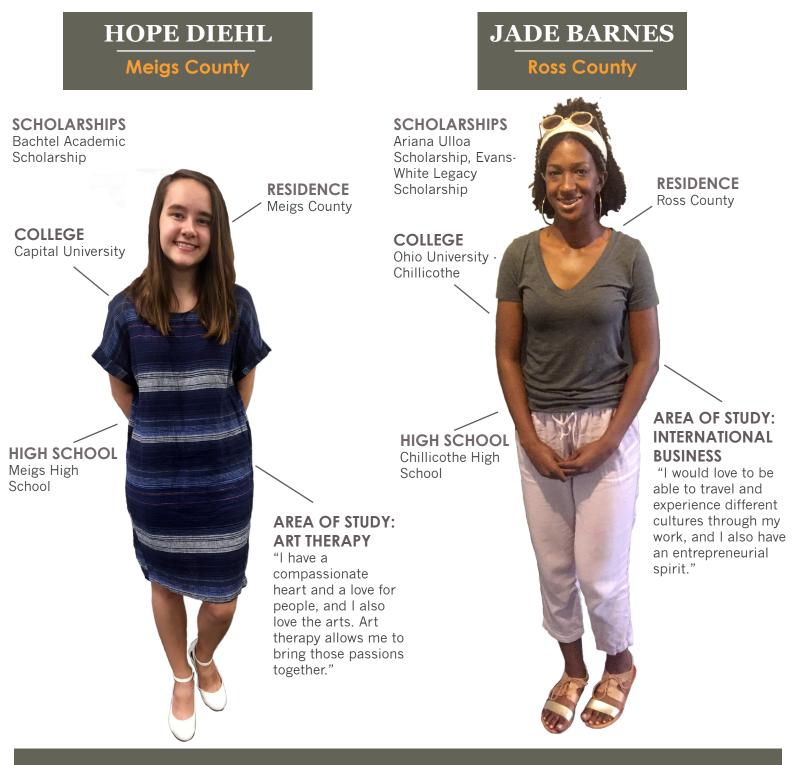
To plan for the legacy you want to leave behind, visit **https://FFAO.GiftLegacy.com** or contact us at 740.753.1111.

### What legacy will you leave?

FAO is pleased to share a resource to help you plan your future gifts. Visit FAO's homepage at **www.AppalachianOhio.org** and click 'Give Tomorrow' on the top right. The site can even walk you through forming a basic will.

### **EVERY SCHOLARSHIP, AN OPPORTUNITY**

In 2018, FAO awarded more than 500 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.



#### WHAT PHILANTHROPY MEANS TO HOPE

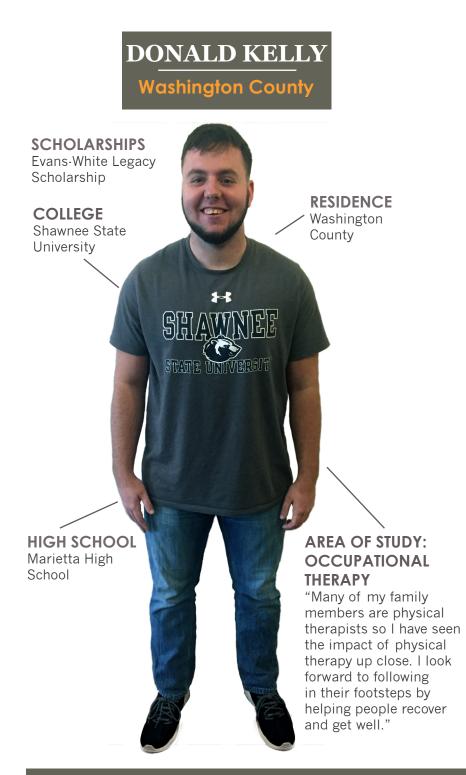
"Every penny really does count, and it is great to have so much support behind me. These scholarships really mean a whole lot."

#### WHAT PHILANTHROPY MEANS TO JADE

"I know that without this scholarship, I wouldn't have the opportunities that I have now. I'm truly blessed to have people out there who care about my goals and aspirations."

### EACH STUDENT, A DREAM TO HELP OTHERS

We take pride in our recipients and the story behind each scholarship fund. The **Foundation for Appalachian Ohio** is honored to support over 280 donor-established scholarship funds.



#### New Partnerships Advance Potential of Region's Young People

In 2018, Jackson City Schools and Steubenville City Schools launched partnerships with FAO by establishing the Jackson City Schools Alumni & Friends Fund and the Steubenville City Schools Foundation Investment Fund, which comprise 49 and 186 scholarship and classroom enrichment funds respectively. Thanks to these two partnerships, the Foundation has grown to more than 280 scholarship funds, awarding 500 scholarships in 2018 – a substantial investment in the potential of the region's young people.

The Steubenville and Jackson school districts chose to partner with FAO so that, through the power of investment, the scholarship dollars available for the students in their districts can continue to grow, offering ever more opportunities for educational advancement. And, thanks to the KeyBank Foundation's establishment of the KeyBank **Education Scholarship Endowment** Fund, which will enhance the Foundation's capacity to support the growth of our scholarship program far into the future, other school districts have the opportunity to do the same.

If you or your school district is interested in establishing a family of funds to empower your area's students, contact FAO at 740.753.1111 or info@ffao.org.

#### WHAT PHILANTHROPY MEANS TO DONALD

"Affordability is a problem for a lot of kids, especially around Appalachia. But Appalachia is also an area where everyone supports each other, and these scholarships provide an extra opportunity to succeed."



# YOUTH LEADING THE WAY:



Youth in action for prevention.

### **BRINGING YOUTH VOICES INTO SUBSTANCE USE PREVENTION**

As stories of how opioid abuse continues to devastate Appalachian Ohio communities become more and more common, there is often discussion about how to reach our youngest citizens with prevention. Many of these conversations focus on how few dollars are currently directed toward prevention initiatives and ensuring that the prevention initiatives which do exist in schools and communities are evidencebased.

At FAO, we have always had a history of encouraging and supporting the children of Appalachia. That's because FAO believes in the power of the region's youth and in their ability to help lead their communities in planning for the future. So when we decided to focus on prevention, we knew we needed our region's youth at the forefront.

This fall, eleven grantees will have the resources to put youth in the driver's seat of substance use prevention in their communities. Each grantee

FAO has always believed in the children of Appalachia. As we partner with our communities to tackle some of our greatest challenges, we know that our youngest citizens have an incredible ability to lead. We have great hopes for the ways these young people can make a difference for their peers and their communities, in particular around issues of substance use."

- Cara Dingus Brook, FAO President and CEO

submitted an application to be a part of the first Appalachian Ohio network focused on youthled prevention and will receive \$5,000 over two years, as well as training and technical assistance for adult facilitators of youth-led programming, and the support of fellow grantees who are guiding youth leaders in the region to build or develop stronger evidence-based youth-led prevention efforts. The young adults at the center of these efforts will analyze local data to identify evidence-based strategies and messages for substance use prevention that are particular to their communities.

Strengthening Youth-Led Prevention is the first grant initiative through the Foundation's Health & Human Services Pillar Fund, one of FAO's Pillars of Prosperity. FAO launched the Pillars to create and invest the kind of flexible, strategic funds most needed to chart a path toward prosperity for the region's communities.

### SUPPORTING EDUCATION WITH RETIREMENT FUNDS



Dave and Bev Paxton have spent all but 13 years of their lives in the Somerset community, and Dave attended what is now the Holy Trinity School for all 12 years of his primary education. These deep roots drove the Paxtons to find a new way to make a difference for the Holy Trinity School and the community.

Dave and Bev had long made contributions to the Holy Trinity Parish and School, but through conversations with their professional advisor, they learned about how the IRA Charitable Rollover could help them do more.

The IRA Charitable Rollover allowed the Paxtons to increase their impact through the creation of the Holy Trinity School Endowment Fund at FAO; without the option of the IRA charitable rollover, creating a fund to support the school and community closest to their hearts would have felt out of reach. **The IRA charitable**  rollover allows individuals to make tax-free contributions directly from their IRA to tax-exempt, charitable organizations annually after age 70 ½, without increasing their taxable income and while meeting minimum distribution requirements of their IRAs.

Grant dollars will be used for items, programs, and activities that support and promote the school. These dollars will allow the school to expand, and support ongoing needs and maintenance upgrades.

"We never thought this would be something we could do – create a Fund to support Holy Trinity School – but we are thankful we can use the resources we have to do something for the community," said Bev.

Read the Paxtons' full story at **www.AppalachianOhio.org.** To discuss how you can use the IRA Charitable Rollover to help your school or community in ways you'd never thought possible, please call FAO at **740.753.1111** or email **info@ffao.org.** 

### FAO BOARD OF TRUSTEES

OFFICERS Chair Ronald Strickmaker StoreLynx

Vice Chair Christiane W. Schmenk Bricker & Eckler, LLP

Treasurer TJ Conger John Gerlach & Company LLP

Secretary Nancy K. Lahmers Retired The Ohio State University – Fisher College of Business

MEMBERS Mike Brooks Rocky Brands, Inc.

Jeffery D. Chaddock The Chaddock Group/Ameriprise Financial Services, Inc.

Terry P. Fleming Retired Ohio Petroleum Council Tami Longaberger The Longaberger Foundation

**Mike Moore** Gulfport Energy Corporation

**Julie Sloat** AEP Ohio

Alan Stockmeister Elemetal, LLC; OPM Metals, LLC; Echo Environmental, LLC

David Wilhelm Hecate Energy

Nancy Lusk Zimpher Rockefeller Institute of Government; The State University of New York

EMERITUS Marianne Campbell Retired Holzer Medical Center

**Ron Cremeans,** Dynegy, Inc.

**Robert "Mick" McLaughlin** *Retired* University of Cincinnati

### **STAFF TEAM**

Cara Dingus Brook, President & CEO Marty Adam, Chief Financial & Administrative Officer

Jenn Dougherty, Senior Director of Outreach

Courtney Giffin, Accounting Clerk

Heather Keesee, VP: Southern Ohio

Daniel Kington, Communications & Programs Associate

Tracy Mann, Gift Planning Operations Officer

Lesa McDaniel, Gift Planning Associate

Phyllis Moody, Controller

Kelly Morman, Communications & Programs Manager

Jim Rocchi, Director of Outreach: Eastern Ohio

Maureen Sharkey, Executive Assistant & Associate Secretary of the Board

Holly Shelton, VP of Gift Planning

Sherri Simons, Director of Outreach

Megan Wanczyk, VP of Communications & Programs

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. If you would like to make a difference in Appalachian Ohio by volunteering with FAO please contact us at **740.753.1111** 



## **KEEPING UP TO DATE WITH FAO**

There are a lot of exciting things happening at FAO. From scholarships and grants to new funds and events, here are some other ways to stay connected:

WWW.APPALACHIANOHIO.ORG Get the latest news and events online at our website.

**eNEWSLETTER** Sign up on our website to receive our quarterly e-news with stories from FAO and periodic updates on scholarship and grant opportunities, events, and more.

VIDEOS Watch the stories of FAO on our website and hear directly from our community partners, grantees, honorees, and donors. Their stories are best told in their own words.

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

ANNUAL REPORT Arriving in your mailbox in early 2019.



PO Box 456 35 Public Square Nelsonville, OH 45764 740.753.1111 www.AppalachianOhio.org



RETURN SERVICE REQUESTED