



fy 2004-05 ANNUAL REPORT



THE SPRINGFIELD
FOUNDATION

*Serving the Clark County
Community Since 1948*



**Making a Difference
in Our Community**



Mission Statement

The Springfield Foundation raises, strengthens, and distributes permanent charitable funds to benefit Clark County.

Vision Statement

The Springfield Foundation helps donors and the community improve the quality of life for all Clark County residents now and for generations to come.

Core Values

- **Promotion of Philanthropy** - We encourage local giving at all levels to connect donors with the causes they care about.
- **Community** - We serve all areas of Clark County.
- **Stewardship** - We are committed to providing effective and efficient management of the funds under our care through wise investment, careful consideration of the community's needs and evaluation of the impact of each distribution.
- **Collaboration** - We partner with donors, grantees and fellow funders for the greater good of Clark County.
- **Relevance** - We are committed to evolving with the changing needs of the community.



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Message from the President and Executive Director

Dear Friends,

Since 1948, the Springfield Foundation has helped many individuals, families and organizations in Clark County achieve their charitable goals by creating endowment funds that **make a difference in our community**. These funds are a conduit through which a donor's generosity is harnessed and turned into a powerful financial tool to assist the causes they care about most. This generosity is demonstrated by the \$1.7 million that was granted to worthy non-profits and local residents in support of charitable causes and scholarships during fiscal year 2004–2005.

As the Foundation grows in asset size, so does its ability to increase the amount it distributes annually – and like most positive things in life, good begets more good. At the Foundation we have the great fortune to work with wonderful individuals each and every day, whether they be our donors, our non-profit partners or others. We are grateful to all those who assist the Foundation in realizing its mission.

We must also acknowledge the tremendous commitment the Board of Trustees has made to the Foundation. Last year, the board underwent an intensive strategic planning process that defined our direction for the future. This direction is reflected in our new mission statement, vision statement and core values. As we chart our future course, various aspects of our work will change, while others will remain the same. In the months ahead, our trustees and staff will once again re-examine our grantmaking priorities, as community foundations must periodically do. This will ensure that we are responding to our community's ever-changing needs. At the same time, we will remain committed to the needs of our entire service region and will continue to serve all areas of Clark County.

One of our most important responsibilities is to offer solid support to the many donors who rely on us to help them put charitable dollars to work. At the Springfield Foundation, we constantly strive to cultivate and maintain our knowledge of the community. By being in touch with the community and its needs, we can bring people together to solve community challenges through philanthropy.

To all those who have supported the Foundation, financially or through their volunteerism, please accept our sincere thanks for helping us make a difference in the lives of others. We hope your generosity will inspire others to join us in partnership to make our community a better place to live. We firmly believe that everyone can be a philanthropist!

We appreciate the opportunity to share the Foundation's accomplishments with you and it is with pleasure that we present this year's Annual Report.

Sincerely,

Peter K. Noonan

President

Robin Atwood Pfeil

Executive Director



Peter K. Noonan



Robin Atwood Pfeil



Statement of Financial Position

Through March 31	2005	2004
Cash and Cash Equivalents	\$2,335,339	\$2,053,752
Investments	28,761,501	28,119,845
Prepaid Expenses	11,129	6,647
Furniture and Equipment – Net	22,524	28,390
Leasehold Improvements – Net	19,993	21,718
Total Assets	\$31,150,486	\$30,230,352
Total Liabilities	(755,097)	(674,693)
Net Assets	30,395,389	29,555,559
Total Liabilities & Net Assets	\$31,150,486	\$30,230,352

Combined Statement of Activity

Through March 31	2005	2004
Revenues		
Contributions	\$1,640,615	\$3,047,222
Investment Income	2,686,816	4,963,946
Increase in Appreciation on Investments	(766,512)	453,037
Total Revenues	\$3,560,919	\$8,464,205
Expenses		
Grants and Scholarships	\$1,716,122	\$1,594,352
Administrative Expenses	423,521	314,515
Programatic Expenses	581,546	476,671
Total Expenses	\$2,721,189	\$2,385,538
Increase in Net Assets	\$839,730	\$6,078,667
Net Assets Beginning of Year	\$29,555,659	\$23,476,992
Net Assets End of Year	\$30,395,389	\$29,555,659

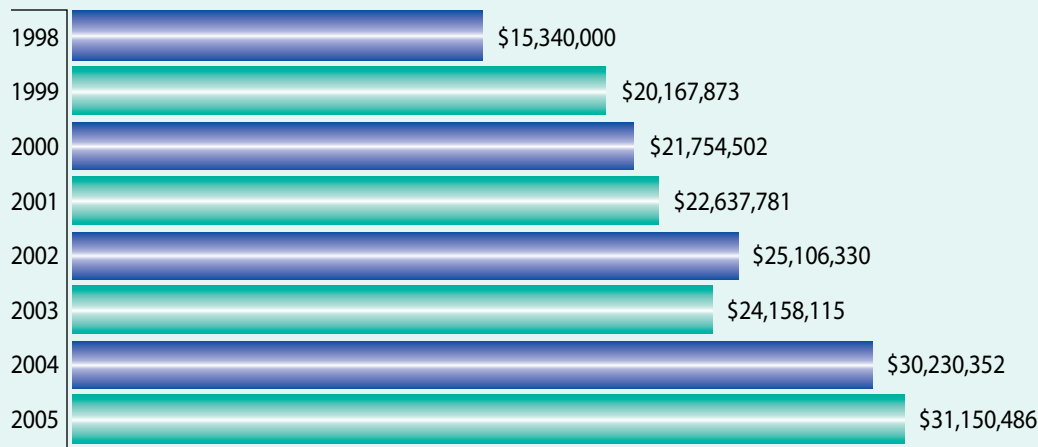


Mr. Reed Robertson, valued trustee of the Springfield Foundation who served from 1975 to 2002, received the Homer C. Corry award, the Foundation's highest award for distinguished trustee service on May 19, 2004. He served the Foundation in a variety of capacities including Board President from 1983 to 1986 and as Board Secretary from 1986 to 1999. Mr. Robertson is most noted for his leadership and guidance as Chairman of the Foundation's Investment Committee. He served in this capacity from 1983 until 1999. During this time, the Foundation's assets grew an astounding 17-fold from \$1,210,000 to \$20,167,873. Mr. Robertson continues to provide leadership in our community today, serving on such noteworthy projects as the Rocking Horse Center which provides pediatric healthcare to the most needy children in Clark County. The Foundation and the community are forever grateful for his dedicated service.

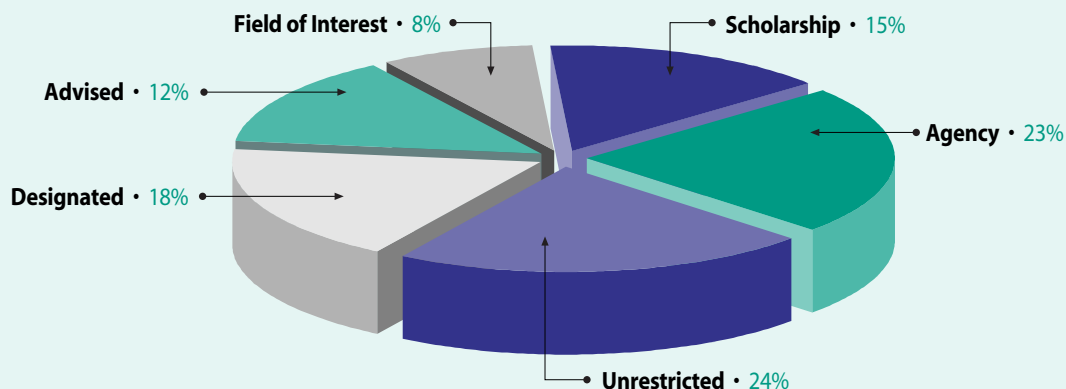
Growth in Total Assets

Springfield Foundation FY 05

Total Assets



Endowment Fund Assets by Fund Type





The Vessels of Praise Dancers of St. John Missionary Baptist Church perform in honor of the AACF kick-off event.

Endowment Funds

During this past fiscal year, donors partnered with the Springfield Foundation to create permanent charitable endowment funds that benefit Clark County. The Foundation is forever grateful for their involvement and support. New funds established during the fiscal year include:

African American Community Fund

On February 17, 2005, the Springfield Foundation kicked off the creation of the first affiliate fund in its history – the African-American Community Fund (AACF). One of only a handful of such funds throughout the country, the AACF offers a unique opportunity for local African-American donors and friends to create a permanent financial resource that will positively impact future generations for years to come. The affiliate is a family of endowment funds within the Springfield Foundation. Over time, the number of funds within the family will grow as donors create new named funds including unrestricted, advised, designated, field of interest, and scholarship funds. Funds can be established for a minimum of \$10,000, scholarship funds start at \$30,000, and these balances can be achieved over time. In addition to the named endowment funds created by individuals and families, the Springfield Foundation created a pooled general unrestricted fund that will be used to make grants to nonprofit organizations that have programs which serve African-American interests.

The Helen J. Brumfield Scholarship Fund

A former teacher in the Clark County School System, Ms. Brumfield established this fund to benefit Clark County students.

Clark County Mental Health Foundation Fund

This Agency Fund was established to support the operations and further development of the organization.

Louise Leonard Unrestricted Fund

A former teacher in the Springfield City School System for 42 years, this donor established an Unrestricted Endowment Fund through her last will and testament.

Mu Chi Chapter of The Omega Psi Phi Fraternity Scholarship Fund

This scholarship was established by Fraternity members to assist Miami Valley high school seniors. Final criteria for the award are yet to be determined.

Ben Wheldon Perks Endowment Fund

This endowment fund, earmarked to benefit Planned Parenthood, will be funded from the remaining assets of a Charitable Gift Annuity that was created.

Physical Disabilities Fund of the Springfield Foundation

This fund was established by an anonymous donor to assist those with disabilities. The fund will be overseen by the Springfield Foundation, but will have its own Advisory Committee comprised of local individuals with various physical disabilities.

Nelson and Belva Stallsmith Scholarship Fund

This scholarship fund will benefit worthy children of members of the Harmony Lodge #8, Champaign Lodge #525, and Knights of Pythias of Westville, OH who are planning to pursue courses of study at an accredited institution of higher education.

Endowment funds already in existence at the beginning of the year are listed below alphabetically by fund type with their date of inception noted. We are forever grateful to those who established them to provide for the community's ongoing benefit.

Unrestricted Funds

Unrestricted Funds (dollars given to the Springfield Foundation, but not restricted in their use by the donor) are a vital component of the foundation's plan to meet future needs in the community. It is these unrestricted funds that enable the Springfield Foundation to respond to changing needs in our community – needs that could not have been anticipated when the donor originally made the gift.

The Margaret E. Baker Fund – 1988
The Weldin R. Baldwin Fund – 2003
The Charles A. Boyers Fund - 1985
The Juanita Jeckels Eakins Fund - 1981
The General Endowment Fund – 1950



- The Max H. and Norma Jean Gerke Endowment Fund - 2001
- The Arlin J., Barbara A., and David R. Grisso Memorial Fund - 1998
- The Perry Halley Fund - 1992
- The Heckler Family Endowment Fund - 2001
- The Lester Held Endowment Fund - 2002
- The Martha and Arthur Lutz Unrestricted Fund - 1999
- The Paul A. Pence Memorial Fund - 1994
- The Charlotte and Harry Smith Unrestricted Fund - 1998
- The Social Service Bureau Fund - 1952
- The Springfield Savings Society Fund - 1974
- The M. Louise Steele Unrestricted Fund - 1999
- The Florence E. Stewart Fund - 1996
- The Roy R. Sultzbach Fund - 1997
- The Catherine C. Uhlman Fund - 1993
- The Annie VanderLinde Unrestricted Fund - 1999



Foundation grants support recreational programs County-wide.

Donor Advised Funds

Donor Advised Funds allow donors and their families a great amount of flexibility and encourage donors to play an ongoing role by recommending grants to charitable projects or organizations. Foundation staff maintain grant records, monitor grant distributions and ensure that grants achieve their intended purpose.

- Anonymous Fund #1 - 1986
- Anonymous Fund #2 - 1986
- Anonymous Fund #3 - 1999
- The Robert and Ruth Bayley Fund - 1997
- The Betty Fund - 2003
- The William R. Brannick Memorial Fund - 2002
- The Chakeres Lifeline Fund - 1988
- The Roy and Kathryn Hickes Family Advised Fund - 2000
- The Todd and Gabriele Leventhal Family - 1995
- The Matthies Family Fund - 1997
- The Marion B. Robertson Fund - 1986
- The Linda S. Sanders Fund - 2003
- The Chelsea Valentine Rainbow Trust Fund - 1999
- The Hattie Gordon Willens Memorial Fund - 1994
- The Willie D. Fund - 2003

Field of Interest Funds

Field of Interest Funds enable donors to focus their charitable giving on particular areas of interest like the arts, education or health care. Within the specified areas of interest, the Foundation seeks out best grantmaking opportunities and programs capable of achieving donor's overall objectives.



Springfield Symphony Orchestra members

- The Ralph L. Barlow Cancer Care Fund - 1981
- The Ralph L. Barlow Handicapped Children & Mentally Retarded Assistance Fund - 1981
- The Clark County Community Fund for Arts and Culture - 2002
- The Clark County Community Fund for Civic Affairs - 2002
- The Clark County Community Fund for Conservation and the Environment - 2002
- The Clark County Community Fund for Education - 2002
- The Clark County Community Health Fund - 2002
- The Clark County Community Human Services Fund - 2002
- The Dorothy Ella Dowell Fund - 1997
- The Robert M. Farish Family Building Trades Fund - 2002
- The Greater Springfield Day Care Center Children's Fund - 2000
- The Sylvia K. Mendelson Fund - 1989
- The Hilda H. Seaman Memorial Fund - 1993
- The Springfield Children's Zoo Fund - 1976
- The Louise Staley Fund - 1989
- The Howard L. Templin Endowment Fund - 2003

Designated Funds

Through Designated Funds, donors can identify one or more organizations to receive annual grant distributions in perpetuity. If, however, the designated charity ceases to exist, loses its tax exempt status or changes its mission, the Foundation will select an alternative organization with similar purposes to honor the original intent of the donor.

- The Charles L. Bauer Fund - 1959
- The Gail O. and Esther E. Brunson Fund - 2000
- The Charles A. Boyers Children's Home - 1985
- The Michael H. and Pauline N. Chakeres Endowment - 1996
- The Elisabeth R. Cole Designated Endowment Fund - 2002
- The Paul V. Deer Children's Home Fund - 1978
- The Warren G. Elliot Fund - 1998
- The Esplanade Fountain Endowment Fund - 1995
- The David E. Foley Fund - 1994
- The Gateway Garden Endowment Fund - 2000
- The Rabbi Marianne L. Gevirtz Temple Sholom Fund - 2003



Cathy Bell and friends help with Cultivating Neighborhoods.

- The Anna Jean Gianakopoulos Fund – 1981
- The Louise and Albert Goodman Fund – 2001
- The Mina H. Hadley Fund – 1988
- The Laura E. Jacobs Fund – 1957
- The Barbara Deer Kuss Nursing Endowment Fund – 2000
- The Bessie B. Martin Fund – 1953
- The Martin Family Fund – 1998
- The Harris E. Miller Fund – 1976
- The Dorothy M. Mumma Tuition Loan Fund – 1983
- The Harold S. Pollens Charitable Trust Fund – 1997
- The Dennis and Ruth Porter Fund – 1999
- The Lucie M. Robbins Fund – 1991
- The Sig and Ilse Sander Festival Dinner Fund – 1988



Rotary Special Olympics

Agency Funds

Agency Funds allow nonprofit organizations to use the Springfield Foundation as its fiscal agent to provide an ongoing source of income for operations and programs.

- The Jessie Foos Baker, Springfield Foundation Operating Endowment Fund - 2002
- The Don Bishop, Opportunities Industrialization Center Education and Training Endowment Fund – 1998
- The Clark County Heritage Center Endowment – 1998
- The Don Ackerman Memorial Fund of the Kiwanis Foundation – 2003
- The General Operating Fund of the Kiwanis Foundation – 2003
- The Scholarship and Student Loan Fund of the Kiwanis Foundation – 2003
- The Conrad Turner Memorial Fund of the Kiwanis Foundation – 2003

- The Logan County MRDD Fund – 2002
- The Marguerite Morris, Project Woman Endowment Fund – 2000
- The Nehemiah Foundation Endowment Fund – 1999
- The Ridgewood School Endowment Fund – 2002
- The Rotary Foundation of Springfield, Ohio Endowment Fund – 1992
- The Springfield Arts Council Endowment Fund – 1996
- The United Way of Clark and Champaign Counties Endowment Fund – 1998

Scholarship Funds

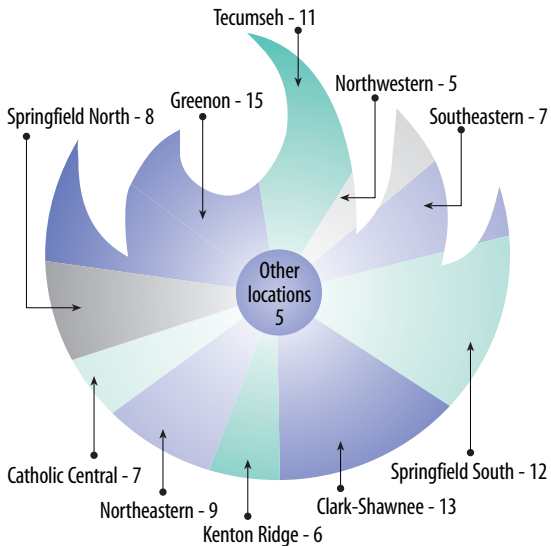
Scholarship Funds may be established to benefit students at all educational levels. In addition, donors may name the scholarship, select eligibility requirements and designate a specific educational institution, field of study or program.

- The Kirk Andorfer Memorial Scholarship Fund – 1991
- The Lewis and Jeanne Bookwalter Scholarship Fund – 2003
- The Mary Jo Hauk Bryan and Fred H. Bryan Scholarship Fund – 2001
- The Albert H. Carr Memorial Scholarship Fund – 1964
- The Richard and Kay Cartmell Memorial Scholarship Fund – 1994
- The Cooper Energy Services, Ajax Superior Employee Scholarship Fund – 2001
- The Carl and Francis Fisher Scholarship Fund – 1994
- The Charles L. Fox Family Educators Award Fund – 1997
- The Lydia Freking Scholarship Fund – 1997
- The Louise and Albert Goodman Scholarship Fund – 2001
- The D. Michael Harber Memorial Scholarship Fund – 1997
- The Ralph and Kathryn Harman Memorial Scholarship Fund – 1986
- The Home City Federal Savings Bank, Julia Ward Turner, Scholarship Fund – 1999
- The Merlin G. Johnson Scholarship Fund – 1998
- Les Femmes des Charities Scholarship Fund – 1996
- The Kathryn Littleton Scholarship Fund – 1987
- The Frank Long Scholarship Fund – 1990
- The Mary Masters Scholarship Fund – 1999
- The Miner Moore Scholarship Fund – 1990
- The Dorothy M. Mumma Scholarship Fund – 1983
- The Charles V. Myers Scholarship Fund – 1994
- The Education Options Scholarship Fund – 1995
- The Penwell Trust Scholarship Fund – 2000
- The Myron and Helen Porter Scholarship Fund – 1997
- The Dorothy Z. and Howard N. Scarff Memorial Scholarship Fund – 1999
- The Patricia Sharp Memorial Scholarship Fund – 1991
- The D. Suzanne Smith Memorial Scholarship Fund – 1991
- The Jennifer Lou Spencer Memorial Scholarship Fund – 1997
- The Springfield News-Sun, Ralph Doyle Endowed Scholarship Fund – 1999
- The Howard Zeller Scholarship Fund – 1989



Scholarships

During fiscal year 2004–2005, the Springfield Foundation awarded \$156,280 in scholarships to Clark County residents—98 Scholarships (*new awards: 50 and renewable awards: 48*).

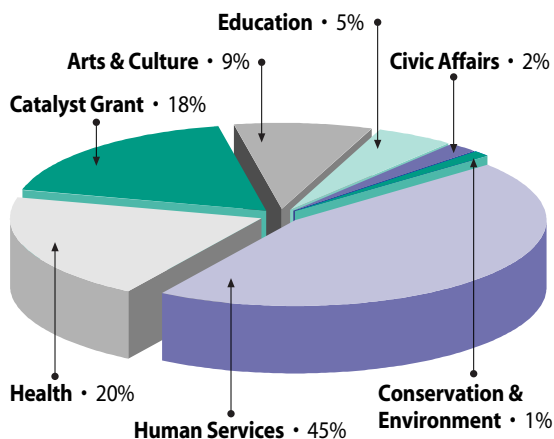


The Springfield Foundation would like to thank the following committee volunteers for their tireless efforts in selecting scholarship recipients. We are extremely grateful for their assistance.

Mary Ann Ark, Cindy Batie, Cathy Bell, Pat Broderick, Robert Carney, Abby Cutright, Betty Deem, Ronald Deem, Dala DeWitt, Julia Donegan, Don Dunstan, Kim Fish, Trustee Gordon Flax, Peg Foley, Maxine Harris, Pat Hearlihy, Bruce Hemphill, Kay Hickes, Trustee Sallie Ingle, Jeanie Jackson, Barbara Jenkins, Tina Jones, Vinita Khanna, Pastor Bonny Kinnunen, Shirley Kuchta, Cindy Lange, Trustee Sarah Lupfer, Robert McClure, Guy Miller, Mary S. Miller, Trustee Vurn Mullins, Russ Ostrowski, Nora Parker, David Plant, Pastor Daniel Powell, Ester Pyles, Zeba Ranginwala, Beverly Rice, Sonya Ryhal, Diana Seaman, Jagdish Singh, Elbert Smith, William Smith, Wilma Somers, Trustee William Stapleton, Lois Staton, Forrest Trisler, Julie Valentine, Todd Vehorn, Diane Weller, Cinda Whitaker, Sara Winwood, Alice Wolf, Cathy Yeazell, and Melissa Zaletski.

Discretionary Grants

Discretionary Grants from the Foundation’s unrestricted endowments totaled \$352,465 for the year.



In addition to its Discretionary Grants Program, the Foundation distributed \$592,273 from its Restricted Grants Program and another \$615,104 from its Charitable Checking Grants Program. These grant awards total \$1,559,842 for the fiscal year.



Funding for the Summer Arts Festival provides fun for all ages.



Fiscal Year 2004-05 Contributors



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 Mr. Brian Ruck
 Mr. Douglas A. Rudy
 Mr. and Mrs. Thomas Rutschilling*
 Mr. and Mrs. James Ryhal*
 Mr. and Mrs. Donald Samuelson*
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 Ms. Marjorie Sanders
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 Robyn Koch-Schumaker*
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 Mr. and Mrs. Gerald Simonton*
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 Mrs. Sharon Slusher*
 Mr. and Mrs. Elbert Smith
 Ms. Tamara Smith
 Mr. and Mrs. O. Lester Smithers, Jr.*
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 Mr. and Mrs. Robert D. Spencer
 Springfield Arts Council

Springfield Command Officers Association
 Springfield Fellowship Club
 The Springfield Jaycees
 The Springfield Police Recreation Club Inc.
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Eli Williams and Michael Whitfield

*Denotes individual or organization was also a Partner in Philanthropy during the fiscal year.



Dr. Stanley and Phyllis Nedelman, Legacy Society Members, with Andy Bell (center).

The Foundation's Legacy Society

The Springfield Foundation Legacy Society recognizes individuals who are planning charitable gifts today that will provide benefits to our community long into the future. Often, a donor's gift goes unrecognized until the end of his or her life, but the Legacy Society provides a way to honor these visionary individuals who are building a bridge to the future through the power of philanthropy. These gifts may take the form of bequests, charitable remainder trusts, charitable lead trusts, charitable gift annuities, gifts of life insurance and other types of estate and charitable planned gifts.

The Legacy Society is the Foundation's way of recognizing and thanking people for their foresight, generosity and philanthropic leadership. If you have made plans to leave a charitable gift to the Springfield Foundation through your estate, or are thinking about doing so, please let us know. For those who wish, your anonymity will be protected.

Memorial Gifts

Contributions were made in Memory of:

- | | |
|-------------------------|---------------------------|
| Mr. Floyd Allen | Mrs. Marjorie Kirkwood |
| Mr. John Allgier | Mrs. Virginia Lash |
| Mr. Robert Anderson | Mrs. Evegelica Linardos |
| Mr. Harry Ark | Mrs. Mary Ellen Lohnes |
| Mr. Patton Banion | Mr. Frank Long |
| Mrs. Betty Bartuff | Mrs. Alicia McPommel |
| Mr. Thomas Bird | Dr. and Mrs. Mendelson |
| Mr. William Brannick | Mrs. Marilyn Miller |
| Mr. Paul Buffington | Mr. Howard Newton |
| Mrs. Adrienne Cook | Mr. Karl Rambo |
| Mrs. Martha Cooper | Mrs. Linda Sanders |
| Mr. J. Russell Crossley | Mr. Daniel Shoumlin |
| Mr. Michael Cultice | Mrs. Annamae Simonton |
| Mrs. Erickson | Mr. James Slusher |
| Mr. Louis Feldman, Sr. | Mr. Dean Spragg |
| Mr. John E. Fent | Mr. Alan Sweet |
| Mr. Gary Funderburg | Mrs. Cynthia Truman |
| Rabbi Marianne Gevirtz | Mr. Albert Turner |
| Mr. Michael Harber II | Mr. John Vickers |
| Mrs. Houseman | Mr. Marshall John Watkins |
| Mrs. Lucille Johnson | |

Thank You To Our Current Legacy Society Members

- Anonymous
- Mrs. Jean Acton-Diltz
- Mr. and Mrs. Robert Bayley
- Mr. and Mrs. Andrew Bell
- Mr. and Mrs. Charles Brougher
- Dr. and Mrs. Martin J. Cook
- Mr. and Mrs. Earl Detrich
- Mr. and Mrs. Peter Gus Geil
- Mr. Charles Kip
- Ms. Barbara Matthies
- Mr. and Mrs. Richard Matthies
- Dr. Roland Matthies
- Mr. and Mrs. Daniel Mc Gregor
- Mr. Robert G. Merkle
- Dr. and Mrs. Stanley Nedelman
- Mr. and Mrs. Peter Noonan
- Dr. and Mrs. Michael Pfeil
- Mrs. Lillian Pollens
- Mr. and Mrs. O. Lester Smithers
- Mr. Charles Swaney

This donor list is checked carefully for accuracy each year, however, errors and omissions may occur. Corrections may be called into the office at (937) 324-8773.

Tribute Gifts

Contributions were made in Honor of:

- | | |
|-------------------------|-------------------------------|
| Mrs. Charlene Alexander | Mrs. Joan Rambo |
| Mrs. Charles Brougher | Dr. and Mrs. John Rechsteiner |
| Mr. Jack Diltz | David and Gayle Sanders |
| Mr. Frank Fuller | T.J. Taylor |
| Ms. Sara Goodman | Mr. and Mrs. Riad Yammine |
| Mr. Abe Katzstein | |
| Mrs. Mary Lou Noonan | |



Gift Opportunities

There are many ways to partner with the Springfield Foundation to support Clark County. For example:

Gifts to Existing Funds

You may contribute to any fund that is already in existence at the Foundation. We recommend you consider the following field of interest funds:

- The African American Community Fund
- The Clark County Community Fund for Arts and Culture
- The Clark County Community Fund for Civic Affairs
- The Clark County Community Fund for Conservation and the Environment
- The Clark County Community Fund for Education
- The Clark County Community Health Fund
- The Clark County Community Human and Social Services Fund
- The General Fund for Grants to Nonprofit Organizations
- The General Fund for Scholarships
- The Springfield Foundation Operating Endowment Fund

Gifts are tax deductible and promptly acknowledged.

Memorial and Tribute Gifts

Any gift may be a memorial or tribute gift. A memorial contribution or gift honoring an individual's birthday, anniversary or other special occasion is a simple and traditional way to show that you care. Best of all, as part of an endowment, your gift will continue to give far into the future. Notice of the gift is sent to the honoree or their family. No dollar amount is ever mentioned.

Partners in Philanthropy

The Partners in Philanthropy Organization, established in 1995, promotes the Foundation and its mission. Comprised of individuals, families, organizations and businesses county-wide, members are asked to share information about the Foundation with family, friends, neighbors and acquaintances. The annual membership dues of \$100 is tax deductible and is used to assist the Foundation in marketing philanthropic opportunities throughout Clark County.

The Charitable Checking Advised Fund Program

This program provides donors with the opportunity to make recommendations regarding distribution of the fund's principal and income to qualified charities throughout the U.S.

Establishing Permanent, Named Endowment Funds

Donors may select the name of the fund they establish and new gifts may be added at any time. A minimum gift of \$10,000 is required to establish most named funds (scholarship funds require \$30,000). The minimum amount can be reached over a two-year period. The Foundation offers the following types of permanent named endowment funds:

Unrestricted Funds - These are the cornerstone funds of the foundation. Trustees are given the discretion to determine how the income can best be used; therefore, these gifts provide the most flexibility in providing for the changing needs of the community over time. Unrestricted gifts can be made to one of the Foundation's General Funds or can be used to establish a separate named fund.

Field of Interest Funds - These funds are established to support charitable purposes in general areas of interest, as specified by the donor. For example, the arts or education.

Donor Designated Funds - The donor specifies one or more organizations to receive the fund's annual income.

Donor Advised Funds - These funds permit involvement by the donor in the grant making process. Donors are given the opportunity to make recommendations with respect to the annual distribution of the fund's income.

Family Advised Funds with Successor Generations - Donors and members of their family jointly suggest the charitable organizations to benefit each year, subject to approval by the Foundation's Board of Trustees. A family member is appointed to serve as the successor advisor at the donor's death or if the donor no longer wishes to fulfill this duty. These funds encourage a tradition of family philanthropy.

Scholarship Funds - Donors assist in establishing the scholarship's criteria by restricting the scholarship to a certain area of study, a specific school or to reflect the characteristics of a memorialized individual.

Agency Endowment Funds - These funds are established by a charitable organization to provide for its own ongoing support.

If you would like to learn more about setting up a fund, please contact the Foundation at (937) 324-8773.



Peter Gus Geil and Mayor Warren Copeland



Asset Types

Endowment funds can be created using:

- Cash
- Publicly Traded Securities
- Bonds
- Retirement Plan Assets
- Closely Held Stock
- Insurance Policies
- Real Estate
- Family Business
- The remainder assets of a Charitable Remainder Trust
- The remainder assets of a Charitable Gift Annuity
- Income from a Charitable Lead Trust
- Other assets, such as copyrights, royalties, timber, and livestock.

The Foundation is willing to consider almost any asset so long as it can be easily liquidated. Those assets which cannot be readily converted into a financial benefit for the charity or that may carry an unusual or potential liability might not be accepted. A Foundation staff member will be glad to discuss possible gift options with you.

Gift Vehicles

Donors may make gifts in several ways including:

- Outright gifts
- Transfers on Death
- Payables on Death
- Life Insurance
- Bequests/Gifts from Wills
- Gifts of Life Estate (current year gift of residence, but donor retains use for lifetime)
- Life Income Gifts:
 - Charitable Gift Annuity
 - Charitable Remainder Trust*:
 - Annuity Trust (CRAT) – fixed payout
 - Unitrust (CRUT) – variable payout
- Charitable Lead Trust*
- A previously established private foundation may be transferred to the Springfield Foundation. We will see to it that the identity and purpose of the original foundation are preserved and that family members are able to continue participating in the work of the fund if they wish.

**Although the Springfield Foundation is frequently named as the remainder beneficiary of a charitable trust, it cannot serve as trustee.*

To learn more about how a planned giving arrangement may benefit your family and the charities you care about, please contact the Foundation.

Applying For a Grant From The Springfield Foundation

The Springfield Foundation’s mission is to enrich and improve community life in Clark County by developing and sharing resources. As a steward of charitable funds, the Foundation provides financial support to qualified nonprofit organizations. We view these grants as investments in the future.

Our Distribution Committee meets each year to consider the following types of grants:

General Operating Support – provides day to day operating support, including salaries

Program or Project Support – supports specific projects or programs

Capital Support – provides grants for construction or renovation of real estate

Seed Support – supports grants to start a new program or organization

The Foundation’s funding process begins with a Letter of Inquiry submitted on the Foundation’s form. Contact the Foundation for the annual deadline date. Final decisions are reported in December of each year. Out-of-cycle requests are usually not accepted; however, the Foundation may consider such a request in an emergency. The Foundation is rarely the sole funder of a program; it is expected that other resources will be sought to accomplish program goals.

Our website, www.springfieldfoundation.org, is a good place to gather general information and begin the grantseeking process. Grants are limited to tax-exempt 501(c)(3) organizations serving Clark County residents, and grants are awarded on a competitive basis. We cannot make grants to individuals, political campaigns, fraternal or political organizations, private schools or for consulting fees or sectarian worship. Interim and Final Evaluation Reports are required. It is suggested you discuss the project or program with our Program Officer at (937) 324-8773.

Applying For Scholarship Support From The Springfield Foundation

The Springfield Foundation administers a variety of scholarships to assist Clark County residents in pursuing education beyond high school. Applications are available from all Clark County high school guidance offices, the financial aid offices of local colleges and universities, and directly from the Foundation in January of each year. Contact the Foundation for the annual application deadline. Scholarship materials must be delivered to the Foundation by 4:30 p.m. on the deadline date. Final award decisions are usually available in June of each year and award payments are sent to colleges in August. Award checks cannot be made payable directly to recipients.



Board of Trustees

(left to right) Robert Burton, Andrew Bell, Lester Smithers, Charles Brouger, Robyn Koch-Schumaker, Daniel McGregor, Peter Noonan, William Stapleton, Peter Gus Geil, Randall Comer, Gordon Flax, William Fralick, Art Gianakopoulos, Michelle Sweeney, Edward Leventhal, David Sanders (seated) Mel Marsh, Jean Acton-Diltz and Phyllis Nedelman.

Not pictured: Roger Evans, Sallie Ingle, Sally Lupfer, Vurn Mullins, Cynthia Singleton-Barnett and Charles Swaney.

Foundation Management

Officers

*Peter Noonan, President
Peter Gus Geil, Vice President
Charles Swaney, Secretary
David Sanders, Treasurer*

Staff

*Robin Atwood Pfeil, Executive Director
Ed Baker, Program Officer
Mary Fischer, Development Officer
Crystal Stevens, Donor Services Coordinator
Ted Vander Roest, Financial Officer*



The Springfield Foundation
4 West Main Street, Suite 825
Springfield, Ohio 45502

Phone: (937) 324-8773

Fax: (937) 324-1836

www.springfieldfoundation.org

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