



# Union County Economic Development Partnership Community Assessment Report

Submitted by:  
Resource Development Group  
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## Assignment

**Resource Development Group (RDG) was retained by the Union County Economic Development Partnership (UCEDP) for the following purpose:**

Conduct a minimum of forty (40) interviews with community and business leaders throughout Union County in order to:

- A. Determine the depth of understanding and commitment to the Union County Economic Development Partnership's current and proposed programming, priorities, and measurable outcomes, as evidenced in the UCEDP's Action Plan.
- B. Evaluate the proposed "Future Funding Priorities," as presented in the Assessment Pre-case.
- C. Test funding potential and capacity for a five-year funding cycle beginning in 2009, with a proposed goal of \$500,000 annually for operational expenses, a projected increase of \$200,000 annually in additional revenue.
- D. Analyze UCEDP's present base to determine the potential of this group to maintain or increase their future financial support.
- E. Identify and cultivate new prospects for the UCEDP's upcoming funding initiative.
- F. Identify potential leadership for a funding campaign.
- G. Define the elements of a possible funding campaign, including strategy, timing, and approach.
- H. Identify any issues that may hinder the future success of a fundraising campaign and determine appropriate courses of action to address them.
- I. Complete a Philanthropic Foundation Screen.

**The results of this Community Assessment are summarized herein.**

# Methodology

Resource Development Group used the following four step process to conduct the Community Assessment:

## Step 1

In order to complete the aforementioned assignment, Resource Development Group drew upon its unique industry perspective and exclusive experience evaluating, designing, and implementing economic development programs and funding strategies in over 100 small, mid, and large size markets. Our expertise in conducting concept audits and designing responsive and individualized revenue-generation strategies has resulted in more than \$500 million in operational capital raised on behalf of our clients, who include chambers of commerce, economic development corporations, and other public, private, and public-private organizations focused on promoting civic health and economic development.

## Step 2

Background and contextual information on organizational development, governance, financial history, and previous funding methods was provided by the staff and board leadership of the Union County Economic Development Partnership.

## Step 3

Individual interviews were conducted with 74 strategically identified public and private sector leaders throughout Union County. Representatives were chosen from a wide variety of industry sectors, and included community leaders from 53 small, medium, and large businesses, community-based organizations, and governmental entities in order to secure a broad spectrum of opinions and analysis on the current and future economic environment in Union County.

## Step 4

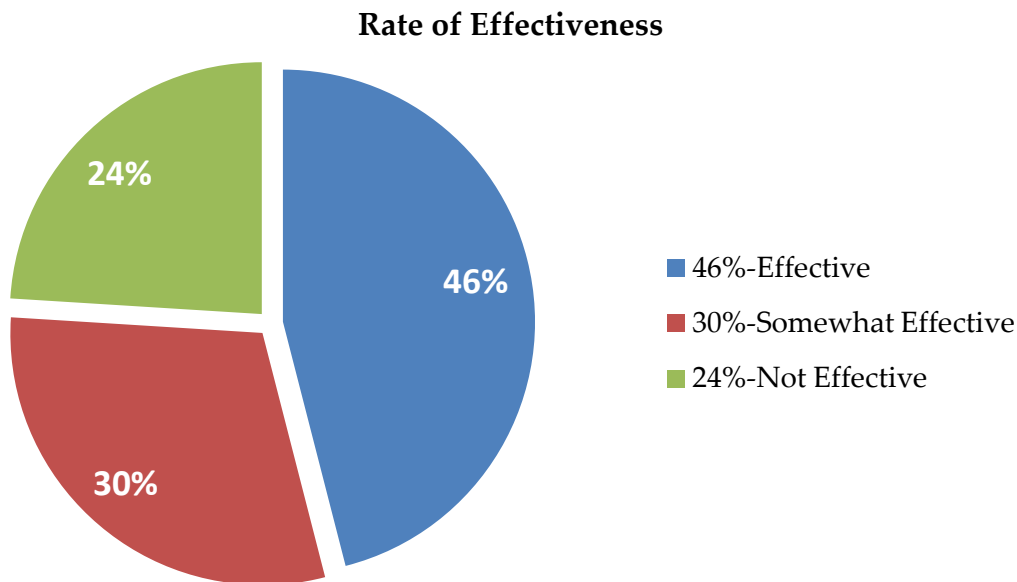
The boards of the Union County Chamber of Commerce and the Community Improvement Corporation will be presented with the aggregated results and full analysis of the 74 Community Assessment interviews, as well as recommended action items to address any organizational issues and future funding strategies.

## Key Findings

The following analysis reflects the aggregated responses of the 74 community assessment participants representing 53 organizations.

### I. Effectiveness

Community Assessment participants were asked to provide their general impressions of the Union County Economic Development Partnership (UCEDP) and to evaluate its effectiveness at meeting its economic development mandate, as set forth in the Union County-Marysville Economic Development Action Plan (EDAP). The EDAP, a collaborative effort resulting in a 20-year strategy to improve the economic health of Union County, focuses on seven core components, including organizational capacity, target industries and quality jobs, target geographic growth areas, community planning, downtown revitalization, performance-based incentives, and workforce competitiveness. Opinions among Community Assessment interviewees tended to vary greatly when asked to rate the level of effectiveness of the UCEDP. Of the 74 individuals interviewed, 34, or 46%, said the organization was effective, 22, or 30% that it was somewhat effective, and 18, or 24%, that it was not effective.



The organization was rated effective or somewhat effective by 76% of respondents. The most common reasons participants identified for the perceived level of effectiveness were the following: the strength and competency of staff; efforts to market Union

County; improvements in Chamber efficiency and direction; efforts to involve community in leadership roles; and demonstrated results.

*“This organization is the most active and aggressive I’ve encountered anyplace and has been directly impacting growth. They’re very cutting-edge.”*

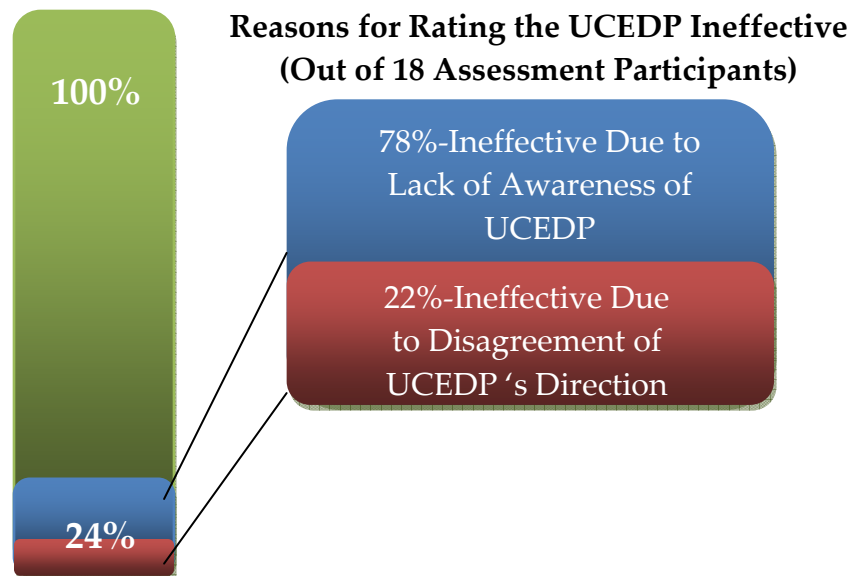
*“They get an A+ for accessibility. Anytime I need information on incentives all I have to do is pick up the phone.”*

*“The Commissioners have given Eric all the tools he needs to close the deal, and the partners are all on the same page.”*

*“The staff is knowledgeable of all the different economic development tools out there and they’re creative and energetic at putting them to use.”*

*“The implementation of the EDAP is moving ahead with the pace of the economy. So, that’s pretty good. And what that actually means is that we’re ahead of the ball as far as managing our growth. People say that eventually we’ll get swallowed by Columbus, but I think we’re doing the right kind of planning to make sure the development that happens is what we want, where we want it.”*

The 18, or 24% of assessment participants who cited the organization as ineffective were asked follow-up questions to clarify their reasoning. The respondents clearly fell into one of two categories when elaborating on their perceptions of organizational ineffectiveness. The first camp cited a lack of awareness of or familiarity with the Partnership, its mission, or its activities. The vast majority fell into this first category, and, in fact, included 14 of the 18, or 78% of those who called the organization ineffective. The remaining 4, or 22%, of participants who cited the UCEDP as ineffective all identified a common reason as well. This group included those who were familiar with the Partnership, but who genuinely didn’t like the direction, programs, or activities of the organization. It’s important to note that this group represents a very small portion, only .05%, of the overall interview pool.



*"It's challenging to understand the set up of the organization. I think it is good having it under an umbrella, but that may lead to some conflicts of interest. There are administrative benefits to having an umbrella organization. But it's impossible for a single board to be focused and energized about such disparate initiatives as arts and economic development, so you can end up with certain agendas being pushed over others."*

*"The funding is muddled. I have no idea how Eric divides money between the programs."*

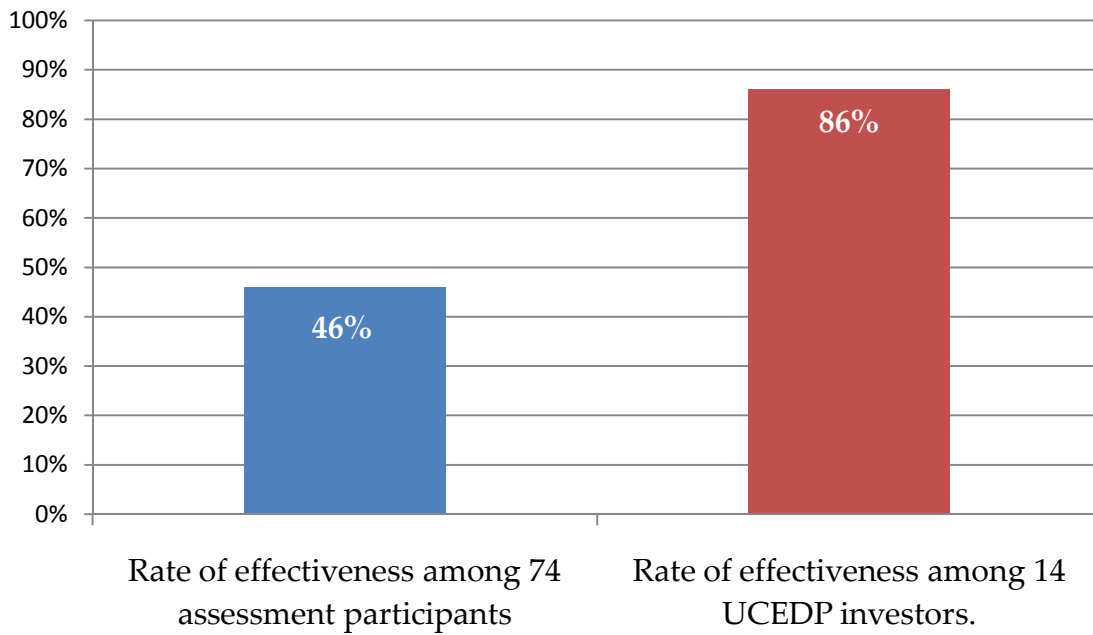
*"There is confusion on what economic development means to Chamber members. Isn't what the Chamber does business and economic development, too?"*

For those who were unable or uncomfortable responding to that question, they were then asked to rate general economic development efforts in Union County. While positive responses increased when the question was asked in this way, several interviewees needed additional prompts to identify any such efforts. While this trend generally doesn't reflect a lack of activity by the UCEDP, it does indicate ineffective communication with the general public, the Chamber membership, and other potential investment prospects of the mission and programs of the UCEDP and its resultant successes.

This point is evidenced by the rate of effectiveness among the representatives of the 14 current investors, who are arguably the most familiar with the mission and activities of the UCEDP and who are all highly involved in the organizational governance structure through volunteer committee work. In fact, the rate of effectiveness skews heavily

when sampling the responses of this core constituency. 12 of 14, or 86% of current investors rated the UCEDP very effective at meeting its economic development mandate, while the remaining 2, or 14%, rated it somewhat effective. This indicates that when constituents are made aware of programs and activities that the UCEDP is implementing through regular communications and updates, the satisfaction level sharply increases.

### **Rates of Effectiveness Among General Assessment Population and Current UCEDP Investors**

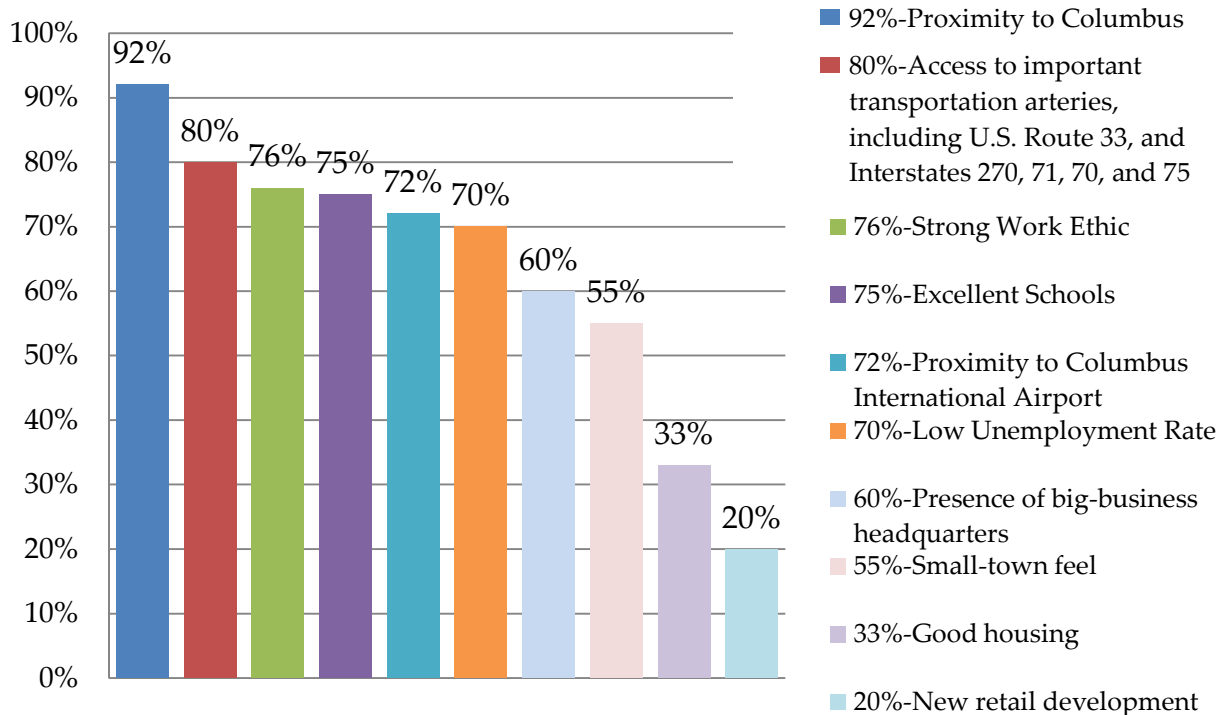




## II. Strengths and Weaknesses

### A. Assets

Community Assessment participants were asked to identify Union County’s greatest strengths with respect to economic development. The following assets were identified by interviewees and appear below in descending order of recognition:



100% of respondents were able to name at least three assets held by Union County. When asked to identify which assets needed increased marketing in order to attract new businesses to the county, only 60% of respondents were aware that marketing efforts on behalf of Union County were on-going. When prompted to identify specific marketing efforts currently underway, about three quarters of this group identified projects being implemented by the Convention and Visitor’s Bureau. While developing a strong tourism industry is crucial to reinvigorating the culture of any region, economic development marketing must have a broader approach and be communicated not only to direct marketing recipients such as site developers and potential company prospects, but to the host community as well.

*"We're lucky to be so close to Columbus. We get all the benefits of the amenities available there, like restaurants and shopping, without having to live in the city."*

*"The easy access to all the important highways we have here is a huge asset. You can get anywhere in the Midwest quickly from here."*

*"People here have such a great work ethic. I know we could take our company elsewhere and pay lower wages, but we wouldn't have nearly the quality of employees."*

*"Our schools have been very strong over the years. I know they've had some difficulty recently passing levies, but I still think the schools are excellent assets."*

*"We're lucky to have such low unemployment rates, especially when you look at how other communities in Ohio are struggling."*

*"Having Honda and Scotts headquartered here really puts us on the map."*

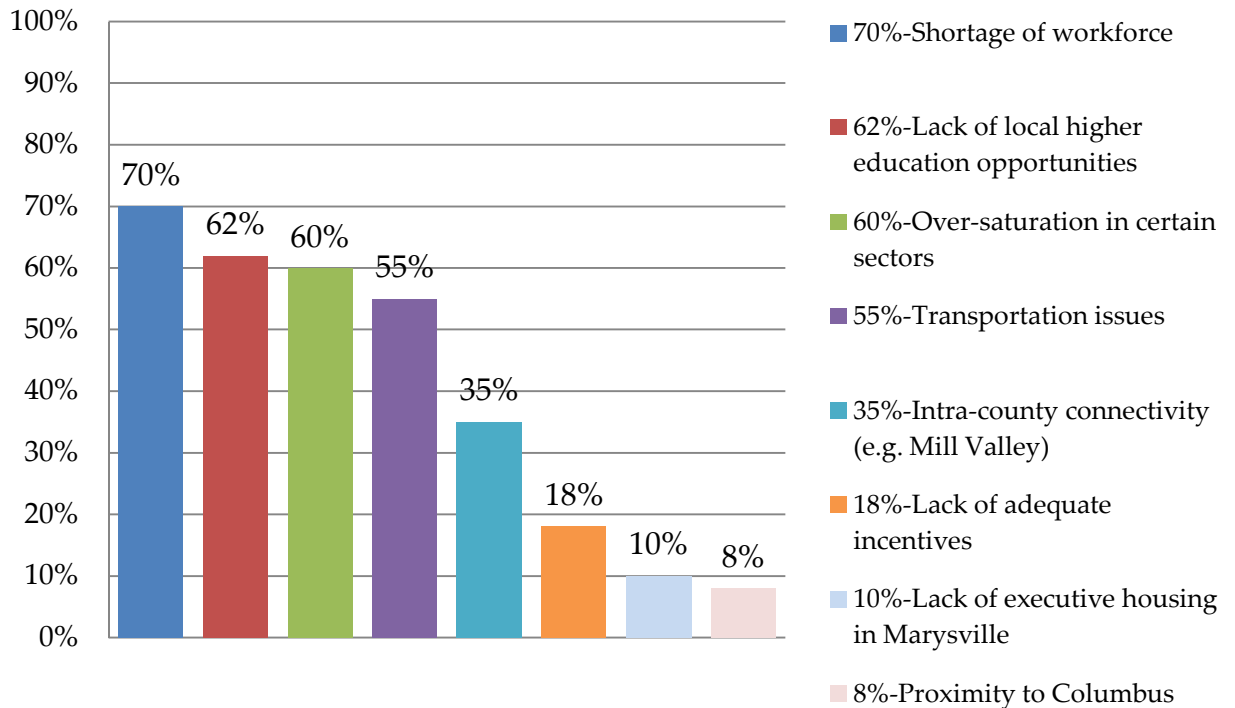
*"We have a strong rural flavor. It's still a close-knit community where people know and care about each other."*

*"There's plenty of housing, and all types. If you want new or historic, or custom, you can find it here and at very affordable prices in comparison with other areas around Columbus."*

*"More people are shopping locally now that we've got some nice retail stores. We're not losing so much to Columbus. And people here have disposable income to spend."*

## B. Limitations

Community Assessment participants were asked to identify Union County's greatest limitations or obstacles from a business development perspective. The following weaknesses were identified by interviewees, and appear below in descending order of recognition:



The challenges identified by Community Assessment participants could be commonly classified as control and containment issues regarding the expected rate of growth and development. Generally speaking, there was a strong sense that growth and change are occurring at a rapid pace and that more is inevitable, but that the community needs to be better prepared to manage that growth in a proactive, decisive way. For example, while workforce, access to transportation highways, and recent retail and residential developments were seen as positive community assets, these same items were perceived inversely and labeled as weaknesses by some respondents. Those who mentioned them as obstacles to Union County's future economic growth and stability consistently cited a lack of control over how these elements have been managed, placed, or addressed by the community as a whole, the elected leadership, and the UCEDP.

Other perceived weaknesses were determined by attitudes regarding Union County's place within the larger Columbus metropolitan statistical area. For example, Union County's proximity to Columbus was cited by 92% of respondents as an asset, especially in relation to added amenities such as highways, airports, and services. However, 8% of participants indicated that they felt Columbus' proximity limited Union County's potential because it created competition for customers, resources, and residents.

*"We don't really have the workforce available to support many more large-scale businesses, unless they get set up on the southern end of the county and draw from Columbus."*

*"There's not really many options for kids that want to live here at home and still go to college. Even though there's so many schools inside Columbus, it's still too far for kids to commute on a daily basis."*

*"The number of retail stores and restaurants and banks has grown so fast that I don't think they'll all be able to make it. We don't have the ability to sustain all of them."*

*"The community may not be big enough to support all the competition in some sectors, like the banks and service/retail sectors."*

*"We need to be more proactive about roads. They seem to be an afterthought. They put in a new development without figuring out how the traffic patterns would change or affect the rest of the city. Traffic is going to be a big problem when the Coleman's Crossing area is finished."*

*"People that live in Mill Valley just hop on 33 and head south to Columbus. They never even come into Marysville to shop or go to the restaurants. We need to figure out how to get them to connect with the Marysville community."*

*"They need to enlarge the CRA [Community Reinvestment Act] beyond the downtown."*

*"The lack of tax-abated land in Jerome Township needs to be addressed. In fact, two new companies that were looking to come to the area decided to go elsewhere because the existing tax abatement policy of the county government needs to be more competitive."*

*"It's good that they have an incentive policy in place, but the tax abatement structure for new businesses is not competitive with other communities surrounding Columbus."*

*“I wanted to live in Marysville, but the only executive housing I could find that was nice enough was across the street from a gas station. Who wants that? And I know I could have built an expensive custom home, but my family didn’t want to live way out in the country. So I bought a house in Dublin and I drive in everyday.”*

*“Columbus has us beat hands down. The only thing we have more of than them is available land, but they’ve got all the amenities.”*

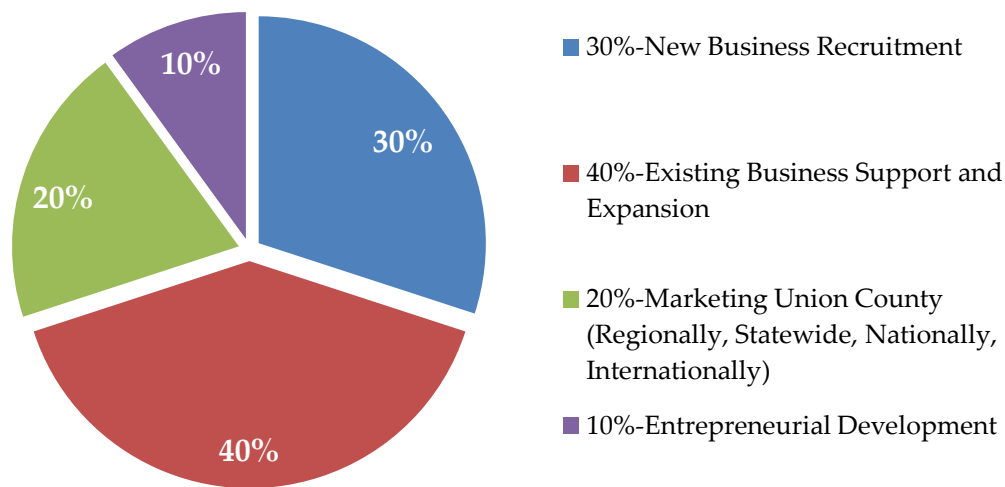
### III. Priorities

A primary purpose of the Community Assessment process is to identify, define, investigate, and evaluate economic development priorities. The identification of priorities can lead to improvements in organizational structure, program delivery, program enhancements, and communications.

#### A. Core Program Priorities

The core of the UCEDP's program of work consists of four key components, Business Recruitment, Retention, Marketing, and Entrepreneurial Development. Generally, the core economic development programs were well received and regarded. In fact, 59 of the 74, or 80% of participants were supportive of the current core economic development programs and the division of staff time allotted to each of the key components. Of the 15 assessment participants who suggested changes in the allocations of resources and staff time among the four core programs, 7 said they wanted more staff time allocated to the New Business Attraction and Recruitment program, while 8 said the Existing Business Support and Expansion/ Retention program should receive more time and effort than new business development. In addition, 24% of respondents indicated they would like to see more community participation in the Entrepreneurial Development program, though they didn't think it should require additional staff time. Rather, people felt that the program was underutilized in its current format.

**Staff time per program**



While these programs received high marks once explained, 60% of interviewees required at least cursory explanations of the core economic development programs, and another 5% needed extensive explanations to understand the basics of economic development.

## 1. New Business Attraction and Recruitment

*“Tax base is still too dependent on two large companies. We need to be more effective at diversification. We need to bring in some more businesses on the list of targeted industries.”*

*“The Chamber did a nice job with the Enterprise Zone in Plain City. And the Industrial Parkway has done very well.”*

## 2. Existing Business Support and Expansion/ Retention

*“There is good involvement of volunteer leadership in retention visits.”*

*“Existing industry needs more support. We never want to lose Honda, Scotts, etc. They are too critical to our economic base.”*

## 3. Marketing Union County

*“Union County isn’t just competing with New Albany and Hilliard and other communities around Columbus, we’re competing with North Carolina and Tennessee and other, more economically progressive, lower-tax states. So we need to tell people outside the state of Ohio what’s special about Union County and what we could do for them if they came here. They need to know that we want their business.”*

## 4. Entrepreneurial Development

*“The Chamber needs to better serve small businesses, rather than focusing on the big players all the time.”*

*“The Entrepreneurial Development program could be stronger. Small business is huge in Union County! And it’s only a tiny piece of the pie.”*

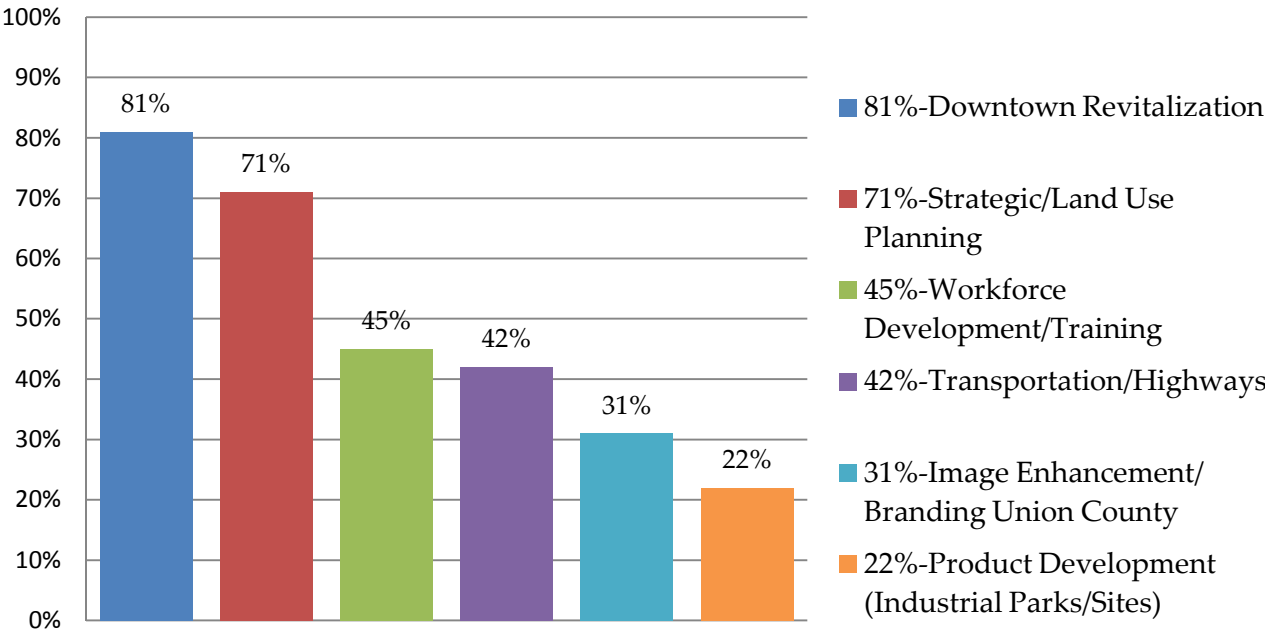
*“I think there are plenty of people who could take advantage of the Small Business Development program, but no one really knows about it, so people don’t use Kevin Hammond’s services and his events aren’t well attended. You can’t wait for people to find you, you have to be actively seeking out entrepreneurial people BEFORE they start their new business. This will help those that are started be more likely to succeed.”*

## B. Proposed Enhancements and Additions

### 1. Proposed Supplemental Activities

Of the list of program priorities offered to supplement the existing core economic development programs currently provided by the UCEDP, the following were identified in order of importance.

**Support for Supplemental Activities**





## a) Downtown Revitalization

Downtown revitalization efforts were identified as a leading priority for economic development with clear consistency. While the opinions of participants regarding downtown revitalization are discussed in much more detail later under the “Proposed New Initiatives” section, it is important to note that 81% of interviewees expressed support for revitalization efforts. In addition, participants were often aware of on-going efforts through established committees who are currently working to implement downtown-related events and activities.

*“I’ve already noticed an improvement in the uptown thanks to the URT; some storefronts have been fixed up, and there’s a couple new shops, but there’s lots more that needs done. The Chamber should be leading the effort.”*

## b) Strategic/Land Use Planning

71% of respondents identified a need to increase or improve strategic planning regarding land use efforts, including zoning, redistribution, and future land needs for business and residential developments, farmland, and green-spaces.

*“The county has done a pretty good job of planning for the inevitable growth that’s coming, but I’m not sure if those plans are always followed. We need to make sure the plan is adhered to, or we’ll end up having lots of urban sprawl and empty strip malls and no more farmland left.”*

*“I don’t feel like we’re ready for the development that’s coming. Marysville should be driving economic development or Dublin will dictate it to them. We need to have zoning in place to tell the developers where they can go, and what they can build, or they’ll do whatever they want.”*

## c) Workforce Development/Training

While Community Assessment participants identified the work ethic of the local labor force as one of Union County’s strategic assets, 45% of respondents said that workforce shortages would hinder the region’s economic development. In addition, concerns were expressed that the current available workforce is not competitive with regard to skills and competencies required in this changing economy.

*“We have one of the lowest unemployment rates in the state. And while we’re lucky to have it that way, it also means that there’s no large workforce to attract big businesses. Basically, if a company needs a large labor pool, they’ll pass our county up and go elsewhere.”*

*“Even though there aren’t many people looking for work around here, those that are aren’t the kind of workers that people want. And there’s not many programs out there to improve their skills so they can transition into new employment.”*

## d) Transportation/Highways

Transportation issues were rated by 42% of participants as being an area of concern now or in the near future with respect to economic development. Most concerns regarding issues of transportation and highways revolved around a perceived reactive, rather than proactive, approach to addressing traffic matters. In addition, there are existing concerns regarding the current traffic patterns, especially in and around new commercial and residential developments.

*“We need to build roads before the development comes. We’re too reactive when it comes to transportation issues.”*

*“As we continue to grow and the population increases, traffic issues are going to get worse. We may need to add lanes to 33.”*

*“We need to connect Route 38 to 33 better. If you build a road on the southern side of Marysville to connect them, it would open the whole southern quadrant up for development.”*

*“Traffic is becoming a problem around the Coleman’s Crossing area and will only get worse with all the development that’s happening there. And Five-Points has always been a problem. We need better ways to get in and out of Marysville.”*

*“We need roads that connect Mill Valley to Marysville, other than 33.”*

## e) Image Enhancement/Branding of Union County

Marketing and branding efforts, while discussed in more detail in the following section, were always identified positively by respondents who chose to comment on them. The general opinion among this group of 23 participants, or 31%, was that any marketing efforts that increase the level of awareness of Union County and its assets and amenities are positive for the community as a whole. However, only 15% of respondents thought that the image of Union County needed to be improved. These particular interviewees mentioned that Marysville needed to better combat its image of being too rural and too far away from Columbus.

*“Marketing is one of those things you can never do enough of.”*

*“Marysville needs to let people know that we’re not ‘Hickville’ and that we’re not that far away. People can live here where the schools are great and people are nice and still go into Columbus easily and quickly when they want to.”*

## f) Product Development (Industrial Parks/Sites)

22% of participants identified physical product development as critical to drawing new businesses to the county. These interviewees believed that more industrial parks should be created in the near future to foster business attraction and expansion projects. However, there was less agreement on the development of speculative real estate as a tool to enhance business recruitment efforts.

*“The Richwood Industrial park is almost full now, which is great. I think people in Richwood are very happy to have the jobs.”*

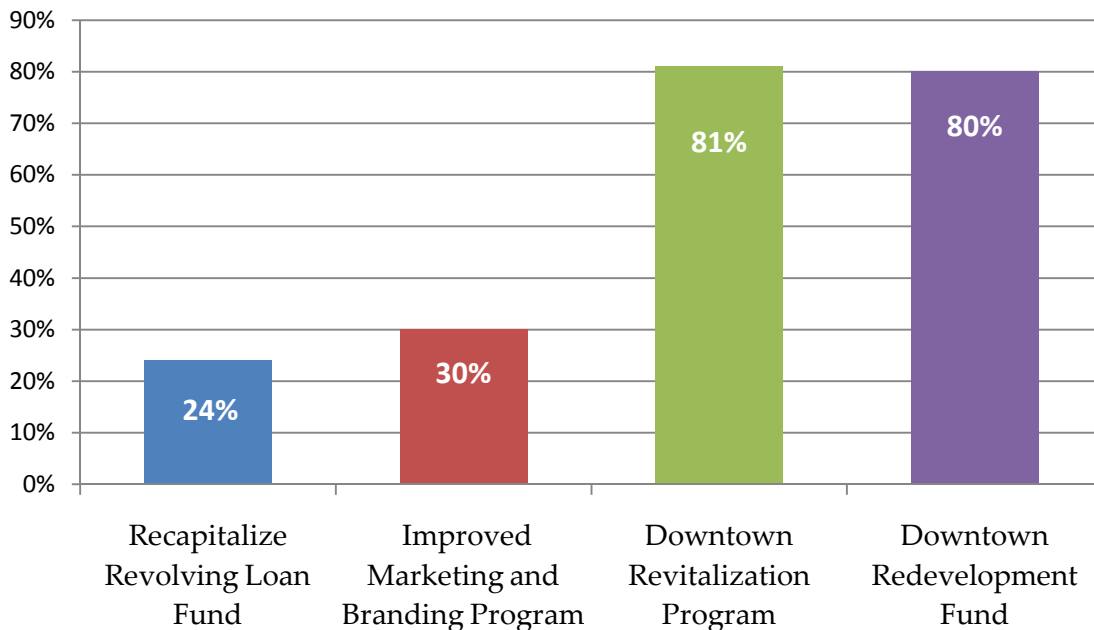
*“Marysville needs its own industrial park to compete with Jerome Township and Dublin.”*

*“I don’t think we should build any spec buildings in the industrial parks. We should keep land set aside so businesses can build exactly what they need and want.”*

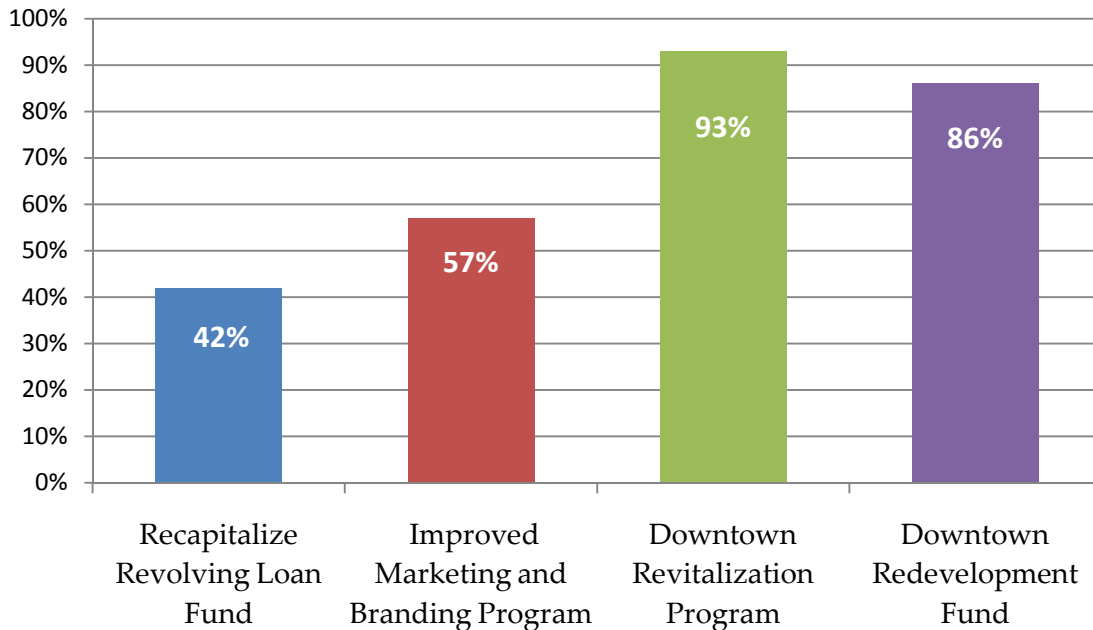
## 2. Proposed New Initiatives

The following four initiatives were offered for evaluation by interviewees during the Community Assessment. Generally, the initiatives were well received, with high marks given to the Downtown Revitalization and Redevelopment Fund proposals. In fact, an emphasis on downtown redevelopment efforts clearly rose to the top as a priority for any new programmatic initiatives, both among the larger interview pool and the current UCEDP investors. This will be discussed in more detail below.

**Support for New Initiatives Among All  
Assessment Participants**



### Support for New Initiatives Among Current UCEDP Investors



Some respondents had general concerns about implementing any additional initiatives beyond the current core programs for two primary reasons. The first was a lack of staff time and resources to implement these new initiatives. Many individuals mentioned that the staffs of the UCEDP and the Chamber of Commerce were already overwhelmed with the current workload. In addition, others expressed concerns regarding potential duplication of efforts within Union County, and sought assurances that the UCEDP would collaborate with any other local entities that may already be doing some of these activities.

*“The staff is already on overdrive. And they’re bursting at the seams. Who’s going to run all these extra programs? And if you hire new folks, where are you going to put them?”*

*“Some of these initiatives could be duplicates. I think there are other programs already doing some of these things. We should check it out before we start our own.”*

## a) Recapitalize Revolving Loan Fund

In general, there was little knowledge of or understanding of the previous revolving loan fund or its success in helping to create the Richwood Industrial Park and other development zones in Union County. However, the 18 interviewees that did have opinions on this initiative were supportive of an effort to recapitalize the fund. Of these respondents, 13 indicated that special efforts needed to be made to help medium and smaller businesses access this fund in order to secure larger commercial loans, especially for capital equipment or expansion projects that may be critical for both business retention and job creation in Union County.

*“This fund should only be for small businesses. We’re the ones who need the extra help, especially in this credit crunch. Banks are less willing to fund start-ups or smaller businesses because of the perceived risks. But big payoffs can come if small businesses can just get the capital they need to grow.”*

*“The revolving loan fund hasn’t yet been paid back from the earlier projects. They need to show they can manage this well.”*

*“The revolving loan fund should be \$1 million, but it should be funded by grants.”*

## b) Improved Marketing and Branding Program

Efforts to market and brand Union County as a great place to do business and to live, work, and play received high marks and many positive comments. Generally, however, when interviewees discussed current marketing efforts, they were referring to events, activities, and publications put forth by the CVB and/or the Chamber. Of the 22, or 30%, of participants who specifically commented on efforts to market Union County to potential new businesses through direct marketing to site developers and industry professionals, all expressed support for increased marketing and branding efforts to assist in new business recruitment and to draw new residents to the area.

*“It’s hard to pin down the effects or results of marketing. You never really know if it’s working. But you have to do it anyway, or you might as well pack your bags and go home.”*

*“Our marketing efforts are already improving, but the more the better. People have to know where we are and what we’re all about.”*

*“Sustainability in downtown Richwood is hard. We’ll get a new business but it’ll close within a couple months. If we could somehow capture the traffic going through on its way to Marion, we’d do better. But that would require more marketing and professional service businesses to draw people in.”*

*“We also need to be doing marketing to bring in new residents. We’re going to have a labor shortage soon, if we don’t have one already.”*

### c) Downtown Revitalization Program

There was clear consensus that downtown revitalization needs to be a programmatic priority of the UCEDP. In fact, 60 out of 74, or 81%, of Community Assessment participants were in favor of revitalizing the downtown areas of the three largest population centers in Union County. Less clear was precisely what that would entail or what a revitalized downtown area might look like. However, often an emphasis was put on attracting retail and restaurants to the town centers in order to draw foot traffic.

*“You can’t have a strong economy without a healthy downtown. There have to be reasons people want to come into town, stay a while, and spend some money there. Otherwise, what’s stopping them from just moving to Columbus.”*

*“We should model ourselves after Delaware or Worthington. There has to be shops and restaurants to attract folks to come spend time in the downtown area.”*

*“Little shops can’t make it here unless they’ve got a niche market. We’ve got to figure out what kinds of stores could fit here, because it’s not enough to have antiques.”*

*“People have to be able to walk around and go from shop to shop. And they will come if you have restaurants and retail shops for them to go to.”*

Of the individuals in the interview pool representing the 19 entities located in areas outside of Marysville corporation limits, 9 indicated they would prefer each urban center to have its own Development Director/Manager. However, all recognized that such a model is cost-prohibitive. Therefore, when pressed, all agreed that allocations of staff time to the Downtown Revitalization Program should be based on population distribution.

*“Richwood needs some extra help. Marysville’s going to survive no matter what, but Richwood and Plain City? It’s not guaranteed.”*

*“Plain City can’t afford to pay for its own downtown development manager, so if we can collaborate with other investors and get some help too, I think that’s a win-win. But we’ll have to combat the perception that Plain City is paying for Marysville’s development.”*

*“Any effort must include Plain City and Richwood. They should be more than an afterthought.”*

*“We don’t need revitalization; we need sustainable maintenance of our existing businesses downtown. Plain City is conflicted about development and growth. We need to have planning discussions and elect pro-development leaders.”*

Of the concerns identified regarding downtown revitalization, the most common included parking in uptown Marysville, consensus on appropriate target businesses for downtown infrastructure, and meaningful involvement of the business and building owners.

*“Parking in Marysville is a continual problem, and we need to come up with some solution to that issue before we can get anything else done with regards to downtown revitalization.”*

*“We don’t have a parking problem in downtown Marysville. We have a walking problem. People will walk the equivalent of several city blocks from their car to the door at Wal-Mart, but they won’t walk the same distance uptown.”*

*“Whether perceived or real, parking is still a problem. The police need to enforce parking codes, and the city should make the street spots metered.”*

*“The Chamber should write the downtown business owners about not parking in customer spots.”*

*“Downtown business hours should be 11am-8pm, so that the stores are open for people who are employed—and have money to spend.”*

*“Marysville needs to have more stringent development standards.”*



*“Uptown redevelopment needs to be led by the building and business owners, not some outside organization that’s forcing change on us. The problem is the cost involved is prohibitive. To meet the building codes and accessibility standards you’d have to take out a loan for more than some of the buildings would be worth.”*

## d) Downtown Redevelopment Fund

Generally, the respondents who supported the Downtown Revitalization Program were also in favor of establishing a Downtown Redevelopment Fund, in conjunction with additional revitalization efforts, such as those described above. In fact, 80% of those that commented on the proposed fund agreed that it would help stimulate capital improvement projects in the urban centers, and assist business and building owners to accomplish a task that might otherwise be cost-prohibitive. They also acknowledged that it would allow for the establishment of standards among redevelopment or façade improvement projects and encourage renewed involvement by developers in the town centers. Only one individual expressed concern about the fund becoming too politicized and therefore, while expressing support for downtown revitalization efforts in general, declined to support this particular initiative. This concern stemmed from the suggestion that the funding for this particular initiative would likely be administered by the Community Improvement Corporation, as its charter allows it to own and hold property.

*“It would be great to have some money available to actually invest in uptown projects, rather than trying to coerce or shame some of the landlords into fixing their buildings, when the rent they’re charging doesn’t even begin to cover the costs.”*

*“Well there’s not much you can do with \$50,000 a year when you talking about redeveloping buildings, but there’s nobody investing in the infrastructure downtown now, so anything’s better than nothing.”*

*“I do think downtown revitalization is a great idea. I’m just not sure a redevelopment fund should be handled by the CIC. That can be a pretty political organization.”*

## C. Other Suggestions

In addition to the proposed priorities evaluated by interviewees during the course of the Community Assessment, several additional issues were identified organically by participants. A number of suggestions were mentioned repeatedly, including the following:

### 1. Organizational Structure

Participants in the Community Assessment interviews repeatedly stumbled over the name of the organization, were unaware that the Union County Chamber of Commerce and the Union County Economic Development Partnership were separate organizations with different revenue streams and expenses, or had a difficult time deciphering the organizational structure. In fact, name recognition of the Union County Economic Development Partnership was very low. Only 32% of respondents were able to identify the UCEDP by name, and these individuals were all either current investors or committee members and thus intimately involved with the organization. The remaining participants were aware that the Chamber had an economic development arm but could not identify its structure. Of the 68% of participants who were aware but not familiar with UCEDP's structure, only 15% said they understood how the economic development department fit into the overall organizational structure.

*"I don't know what the Partnership is. I just know that Eric does the economic development stuff."*

*"The Chamber is much more recognizable. It's sort of obvious that the Chamber would do economic development. I don't know why there's a separate organization for that."*

*"I'm not a Chamber member, so I don't know what the Partnership does. I thought economic development was pretty much handled by the county."*

Surprisingly, this general sense of confusion regarding the organizational structure was also found among some current and past board and committee members. In addition, there was concern over the lack of intra-organizational communication, especially between different committees. The following quotes are taken from interviews with this core group.

*"I never felt the structure was really explained to me when I joined the board. I've seen the organizational chart, but the differences between all the entities are still not clear to me."*

*"Most people associate the Chamber with economic development and don't know about the Partnership. The Chamber is the umbrella organization and the Economic Development Partnership is under that, but people who aren't directly involved or impacted by the organization aren't going to care to understand that."*

*"Some of the board members don't have any idea what a chamber or CIC could do beyond the way things already are. If they had more training, like maybe from some outside source, they might be able to do some innovative things and that might motivate them to become more involved."*

*"I have no idea how the governance works. But I know there's a bunch of committees. I sit on one of them, but don't ask me what anybody else is doing. The committee structure needs to be condensed."*

In addition, other concerns about governance and organizational development arose during the course of the interviews on issues such as volunteer board leadership, organizational sustainability, and information sharing between and among staff and committees. First, there was a strong sense that staff often directed the content and trajectory of committee meetings and agendas, and that little crucial input was expected or encouraged from committee members. This concern was identified by 12 interviewees. In addition, there was common recognition that names are often repeated within committee rosters. This is evidenced by the component Community Assessment participants. A review of the list of participants reveals that 49 of the 74 interviewees are currently serving on at least one committee within the Chamber structure. While this is fairly typical given the nature of the Community Assessment process, what is interesting is that 21 of these 49 individuals are currently serving on at least two separate committees and 8 are serving on three or more boards or task forces. Finally, while the staff received exceptionally high marks for skill and competency, there were 6 individuals who expressed concern about the lack of leadership succession, especially with regard to executive staff leadership.

*"There's a lot of 'rubber-stamping' going on the boards and committees. Eric sets the direction and the board follows along. The direction and leadership should be coming from the board, not the staff."*

*“The leadership needs more information about the retention of current companies. I want to know what’s going on in each sector so I know if we have any companies that are affected by these trends. How can I help convince a company to stay here if I don’t know they’re in trouble?”*

*“It’s always the same people on all the committees. ”*

*“Staff compensation is too low for the skills and assets they bring to the table.”*

*“The Chamber has no contingency plan if we lose Eric. No other staff member could step up to fill his shoes, but he’s not going to stay here forever. We need to come up with a succession plan.”*

## 2. A local institution of higher education

30% of assessment participants, or 22 individuals, mentioned the need for increased access to locally-based higher education. When pressed to describe what that meant to them, 15 of those who advocated for the presence of a local institution of higher education preferred the idea of establishing satellite campuses in Union County to serve local high school graduates and produce an increased and skilled local labor force, while the remaining 7 stated that an independent community college was preferable. Those who recommended establishing a satellite campus locally suggested the following as strong candidates from among the many colleges, universities, and technical schools already present and serving the wider Columbus area:

- Columbus State
- DeVry Institute
- The Ohio State University
- Ohio Hi-Point Career Center

(Note: Ohio Hi-Point Career Center already has a program established in Union County. Respondents who mentioned this institution wanted to see expanded variety in course selections and degrees offered.)

While 9 of the 22 individuals who advocated for a local higher education presence liked the idea of having a four-year institution within Union County, 13 of the 22 interviewees preferred a technical or vocational certificate program, or a two-year associates degree program model. The general consensus was that the students who would choose to take advantage of such a program were those who either lacked the desire or ability to access a four-year institution and that such a program would

produce a ready, skilled workforce from among local residents and recent high school graduates. The remaining four assessment participants stated that they would like to see an institution of higher education established that offered both two-year and four-year programs.

When examined further, 10 of the 22 recommended locating such an institution in the northern part of Union County, as opposed to in or around Marysville. The reason consistently cited was to give access to the northern, eastern, and western counties bordering Union County and thus increase the potential student draw. There was general agreement that the higher education market to the south of the county is already saturated.

*“I think the public schools would be willing to work with the business community to come up with some really relevant vocational training programs or the right kind of 2-year degrees to feed their current and future labor needs. This might even give our kids the opportunity to do something they enjoy and stick around here at home.”*

*“The educational system needs to be altered to meet the needs of average kids. Not every kid wants to or should go to college. There should be viable alternatives for those kids, like vocational training that gives them solid skills.”*

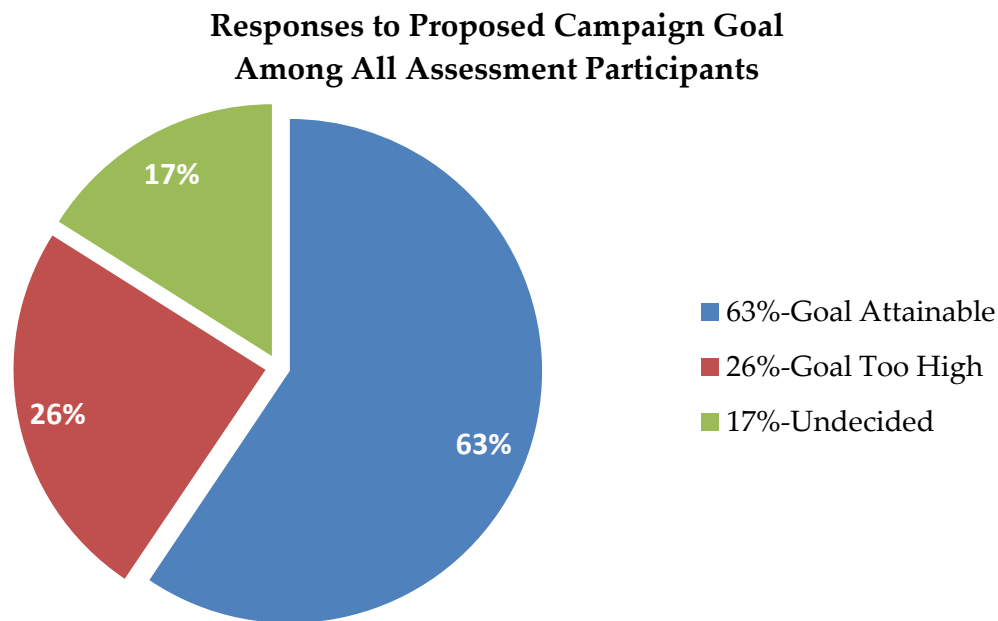
*“We need a community college or technical school based somewhere north of Marysville to work with local companies and manufacturers to offer certificate programs that lead to immediate employment for graduates.”*

*“They should work with companies to identify what their employment needs are going to be in the future and then offer training programs that teach those skills. Then those people could directly feed the employment needs so companies don’t have to bring in outside workers, or worse, leave to go find better skilled workers.”*

## IV. Funding

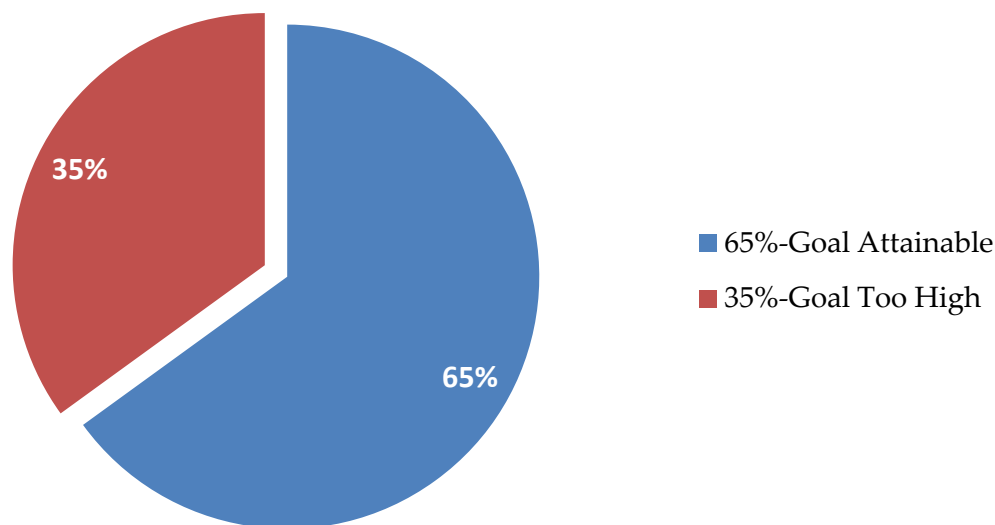
### A. Proposed Goal

RDG tested raising an additional \$200,000 a year in new money to supplement the current annual budget of approximately \$300,000 annually. This would result in a total annual budget of \$500,000 and would be divided among the core economic development programs and the proposed new initiatives discussed in the previous section. 42 of 74 respondents, or 57%, indicated they believed that goal was attainable, while 19, or 26%, felt the goal was too high, and 13, or 17% could not say.



It is important to note that when current investors are viewed as a subset, their responses reflect a similar division regarding the attainability of the goal. In fact, 9 of the current investors, or 65%, thought that the goal was achievable, while the other 5, or 35% believed it was too high.

### Responses to Proposed Campaign Goal Among Current UCDEP Investors



*“A \$200,000 goal doesn’t sound like much. In a community this size, with the number of businesses here, you should be able to raise that much without too much trouble. But it will probably be from bigger, not smaller, companies. The small businesses are almost always strapped for cash.”*

*“The goal is too high, but I can’t say what a good goal would be. It’s really not a good time to do this; we’re heading into a recession.”*

*“The funding is about as good as it’s going to get.”*

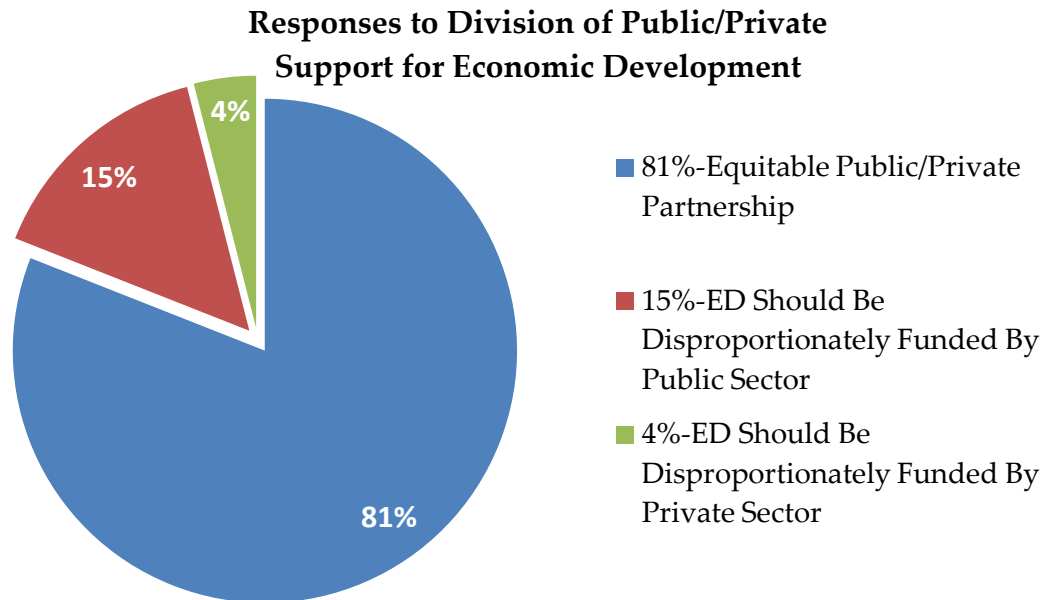
*“I have no idea what other economic organizations like this have for budgets, so I can’t really say what the budget should be.”*

## B. Funding Sources

60 of 74 respondents, or 81% of Community Assessment participants, agreed with the public-private nature of the funding sources. Of those who were happy with the mix of public and private investors, 100%, indicated a preference to move towards a more equitable public-private partnership, in which funding is equally shared on a 50/50 basis between the two sectors.

15% of participants indicated they believed economic development should be disproportionately funded by the public sector. The reason most often cited was the potential for increased tax base revenue generated by economic development projects that would go directly to government coffers.

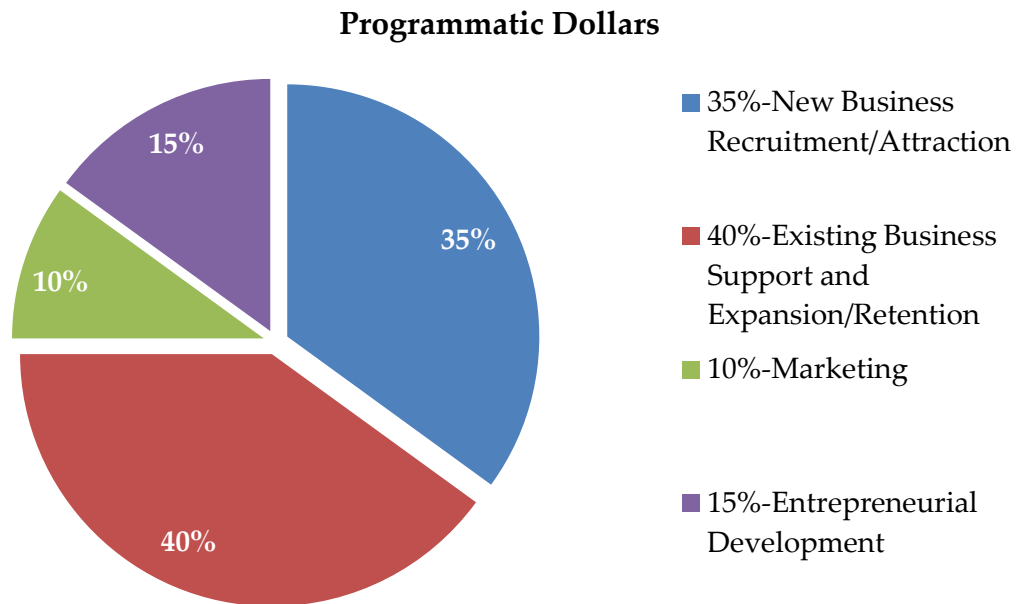
On the other hand, 4% of respondents stated that the private sector should take the lead in funding new economic development. Reasons often cited included the creativity and innovation that is generated from the private sector, the speed of project implementation, and direct benefits to developers and businesses in key sectors.





## 1) Public Sources

Only 15%, or 11 of the 74 Community Assessment participants, believed that the public sector should increase its share of the funding pie. Currently the public sector provides on average 65% of the operational budget of the UCEDP.



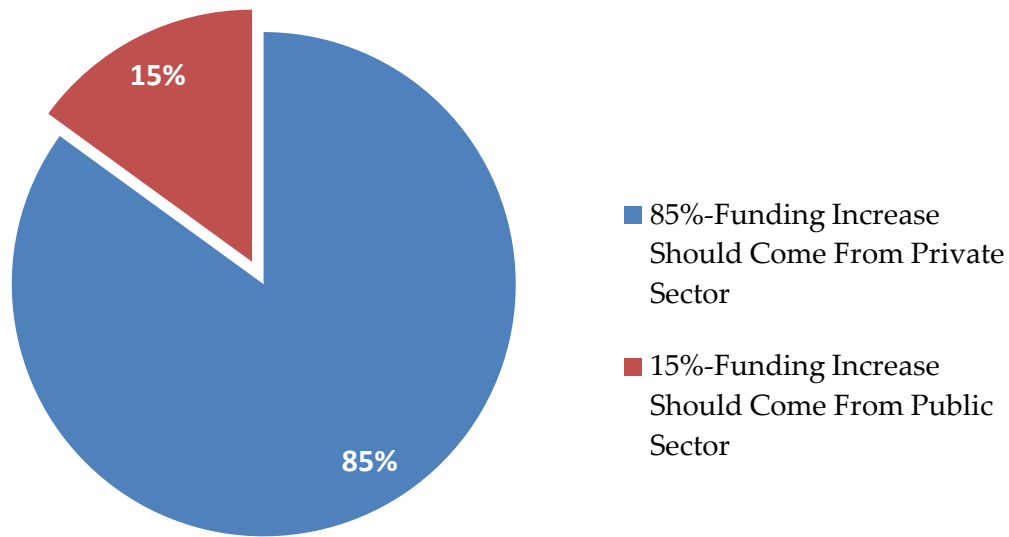
*“Public sources might have been tapped out and would be hard to increase.”*

*“Why would a business want to help you bring in competitors? The public sector should be funding this since it helps everybody across the board.”*

## 2) Private Sources

63 of the 74, or 85% of respondents, believed that the private sector should be better represented among the UCEDP’s investors. The vast majority of these interviewees, or 90%, believed that the organization would not be able to increase support among its existing private sector investors, but would need to seek new investors from among the many small and medium size businesses located in Union County.

## Sources for Funding Increase for UCEDP



*“There are plenty of companies out there that could be supporting this. And they should, but in order to convince them to do so, you’re going to have to show them what the direct benefits will be to them and their business.”*

*“If companies have benefited from incentives, then they should support the Partnership.”*

*“I’d like to see some of my Chamber dues be spent on economic development. I might be willing to increase my dues in order to support it, within reason, maybe \$50 or \$100.”*

*“If it’s left up to tax revenues to fund economic development, it wouldn’t be nearly as effective or impactful.”*

*“The net profit margin of companies should be taken into consideration when you ask them for support. Even if small businesses want to help, they may not be able to.”*

## *Recommendations*

Resource Development Group offers the following recommendations in the critical areas of governance structure, organizational development, community relations, and investor relations to improve organizational capacity, increase performance and efficiency, critically involve volunteer leadership, and improve awareness and understanding of the UCEDP and its programs. The following recommendations will assist the UCEDP to address the economic development limitations identified by Community Assessment participants by improving both organizational capacity with regard to staffing and resource requirements, and programmatic implementation and output. While the list of limitations identified by interviewees contains elements easily addressed by adding or adjusting UCEDP programs and activities, such as over-saturation in certain sectors and the lack of adequate incentives, others will require long term efforts whose success will be determined by the ability of the organization to identify its sphere of influence, attract the necessary resources to wield that influence, and carry efforts through to completion. In addition, some programmatic recommendations will recall elements in the existing Economic Development Action Plan, which noticeably calls for improvements in the downtown areas of the urban centers of Union County, with special emphasis on Marysville. A closer review of this original document and its contents is recommended, both to reorient the focus of the UCEDP on its primary programmatic goals, and as a way of reconnecting future programmatic expenditures and staff time allocations to the limitations identified in this report.

### 1) Governance Structure

The governance structure of any organization is important, but it is especially important when two or more organizations share staff and infrastructure. Because the same individuals may wear many hats during the daily execution of tasks and duties, and because many committee and board members sit on more than one volunteer team, it is crucial to clarify and communicate what these separate areas of focus and identities are and where their respective roles and responsibilities begin and end.

- A. Clarify the UCEDP's scope of activities vis-à-vis other affiliate organizations.
- B. Clarify the Union County Chamber of Commerce's scope of activities, and identify which economic development activities are specifically provided on a contractual basis by Chamber staff.
- C. Define the chain of command among committees, programs, and staff positions.

- D. Communicate the separate goals/activities of the UCEDP and the UC Chamber to chamber membership, current UCEDP investors, and potential UCEDP investors.
- E. Streamline the committee system to improve efficiency and efficacy through consolidation and cross-pollination.
- F. Educate constituency on the different roles and responsibilities of various committees.
- G. Involve volunteer leadership more meaningfully in decision making. Empower board and committee members to set agendas, tackle problems, and generate ideas.
- H. Create succession plans for staff and board leadership.

## 2) Organizational Development

As the UCEDP, the Chamber of Commerce, and the CVB become increasingly sophisticated organizations with greater numbers of investors, members, clients, and constituencies, it will be imperative to build the capacity of the organization to maintain, monitor, and track these relationships over time. Monitoring communications with and the involvement of individual partners will enable the organization to determine the trajectory of the relationship in order to appropriately respond as a partner takes a greater interest in the organization or to attempt to reinvigorate their participation if the relationship wanes.

- A. Set up a 501(c)3 entity to enhance the UCEDP's ability to draw investments.
- B. Install an improved client management system to handle and track financial investments and organizational involvement by UCEDP investors and Chamber members.
- C. Begin investigation now of consolidating all funding streams by next cycle.

## 3) Community Relations

Community relations will be a critical component of the future success of the Union County Economic Development Partnership. Educating the community about the purpose and benefits of the UCEDP will result in furthering both the mission of the organization and funding campaign efforts.

- A. Improve existing relationships with local media and communications

- through regular updates and information sharing, while maintaining organizational integrity and confidentiality agreements.
- B. Work with the business columnists to generate content about the importance of the UCEDP in addressing current and future economic development challenges in Union County.
  - C. Identify strategic community organizations and associations with which the UCEDP can collaborate and whose events could be sponsored or attended by UCEDP staff. Speaking engagements at local community organizations or associations have significant positive impact on the public's awareness of the UCEDP and its programs.
  - D. Identify untapped media outlets or new media entities and cultivate positive relationships with them.
  - E. Investigate broadening the coverage of Union County events and stories on existing Columbus-based media sources, such as local television and radio stations, and newspapers with both large and small circulation.

#### 4) Investor Relations

Investor relations are key to any funding strategy, and are especially important to an organization attempting to significantly increase its support base. Treating key investors as if they are special is crucial to maintaining and enhancing a strong base. It will also have a direct impact on the attrition rate of investors over time.

- A. Define UCEDP investor benefits at all levels of participation. These advantages must differ from the benefits Chamber members already receive. While the direct benefit to all investors is an improved economy that positively affects the whole community, it was repeatedly mentioned during assessment interviews that this particular community would require more tangible and delineated benefits to elicit financial support from a broader base of private investors. A sample list of investor benefits offered by an economic development organization of similar size and structure, and working in a comparable market, has been included as Appendix D.
- B. Conduct annual one-on-one meetings with investors for the purpose of updating them on UCEDP activities and to hear and address any issues or concerns they may have.
- C. Produced a regular e-mail newsletter as a specific benefit for UCEDP investors. Included should be specific information concerning program activities and successes as they relate to the original goals and objectives laid out in the Economic Development Action Plan.

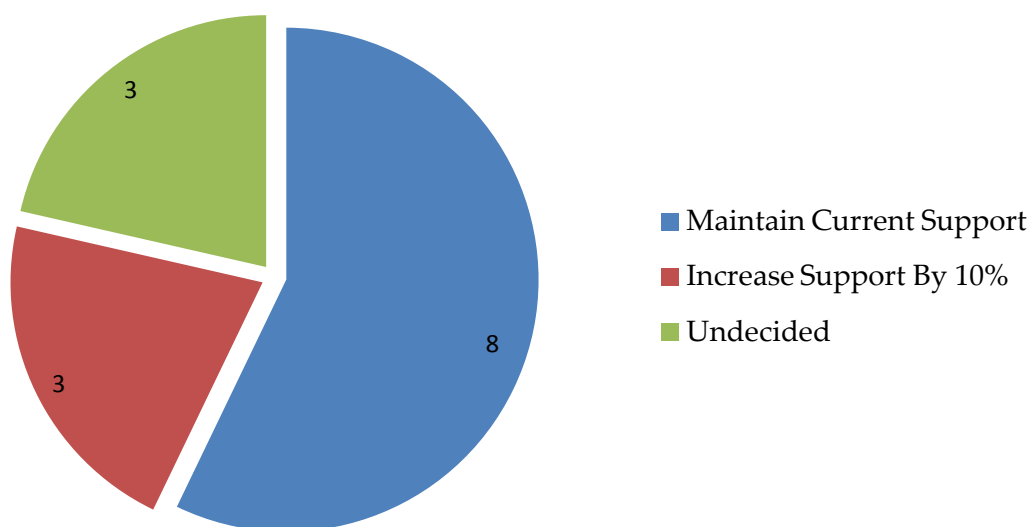
- D. Update the UCEDP website routinely. The website should be a place where investors can go to get the “inside scoop” on current projects.
- E. Increase written communication to all investor companies in the form of letters from leadership and executive staff conveying recent news, accomplishments, and projects. These should be mailed out on a regular, systematic basis.

## Calculation of Funding Potential

When determining the campaign goal for an organization that has an established funding history, it is crucial to first examine the current base for potential shifts in support. As such, representatives of the 14 existing Union County Economic Development Partnership investors were interviewed during the Community Assessment. The top investors of a given organization typically track very consistently from one funding effort to the next. Coupled with the one-on-one interviews conducted during the Community Assessment, we are able to establish a goal that is both aggressive and attainable.

100% of the UCEDP's existing investors indicated that they were planning on continuing their financial support of the organization. 8 indicated they anticipated maintaining their current level of support, while 3 suggested a potential propensity to increase their investment level in accordance with a multi-year campaign effort, though on average this incremental increase would not exceed an additional ten percent. This group thus represents potential funding increases of \$5,000 annually in operational support.

**Propensity for Future Support Among UCEDP Current Investors**



Of the remaining 39 non-investors interviewed during the course of the Community Assessment, 28 indicated interest in contributing to a campaign effort to fund economic development activities in Union County. The remaining 11 expressed a high propensity to decline an investment opportunity in the UCEDP. Of those who indicated they were

likely to decline, 6 cited financial constraints as the main reason for their inability to support the organization. However, the outstanding 5 cited various reasons for their likelihood of declining, and some indicated more than one factor was at play. In fact, 2 felt economic development efforts should be funded by its current investors, 4 believed that they had nothing to gain from investment, 3 thought only large enterprises would benefit and therefore should carry the cost burden, and finally, 1 didn't like the direction of economic development efforts in Union County.

Normally, campaign goals are determined using a combination of data input from assessment interviews and a review of the rates of increase and attrition of past investors from various industry sectors. Given the limited number of current investors and the short duration of their historic financial involvement with the UCEDP, we lack a clear track record of past involvement of investors across industry sectors to guide the goal setting process. Therefore, the UCEDP is essentially functioning as a start-up with regard to its current funding model. In these situations, we have found a 75% ratio of top investors to total dollars raised is a good gauge for establishing a target goal. Thus, an aggressive but safe projection is that this core group of funders will provide 75% of campaign revenue. Currently, the 14 existing investors provide the approximately \$300,000 annual budget of the UCEDP. If we use this number as the baseline in calculating 75% of the potential target, we arrive at a goal of \$400,000 annually. Thus, RDG recommends a minimum target goal of an additional \$100,000 annually, which would bring the operational budget to \$400,000 annually, a total five-year target of \$2,000,000.

Under the right set of circumstances, which would include the substantial enhancement of the investor base, it is not unreasonable to envision that the ratio of top investors to the campaign total could be reduced to approximately 60% of the total cash raised. Therefore, using the same process to calculate total funding potential, a stretch goal of an additional \$200,000 is potentially achievable, a total campaign target of \$500,000 annually. Indeed, this goal becomes increasingly achievable if the stated propensity of both existing investors to increase and potential new investors to financially contribute is realized, as indicated during the Community Assessment interviews. In order to achieve this goal, total investment in the organization would need to expand by at least 40%, a clear, but not insurmountable, challenge. Thus, RDG recommends considering a five-year stretch goal of \$2,500,000.



## *Campaign Recommendations and Target Funding Goal*

Resource Development Group recommends immediately commencing a countywide, public/private funding campaign to generate operating revenue on behalf of the Union County Economic Development Partnership. We suggest a combined public/private minimum campaign goal of \$2,000,000 over five years, which represents \$400,000 in program funding annually beginning in 2009 through 2014. This would signify an aggregate gain of \$100,000 in additional revenue annually. There is some evidence for a potential five-year stretch goal of \$2,500,000, or \$500,000 annually. This will only be attainable if the core investor base is significantly broadened across sectors while the current funding structure is maintained and enhanced.

In addition to a funding campaign of individualized direct solicitations of investment prospects, RDG recommends inviting the larger body of Chamber members to participate in funding economic development efforts in Union County by adding a voluntary assessment to their existing annual Chamber membership dues, with the understanding that these funds would be directed towards the UCEDP. This broader approach would enable smaller businesses to become program investors, increase the level of awareness of the UCEDP's programs and economic development function, and strengthen the connection with the broader business community within Union County. Finally, a generalized appeal to the larger membership will help educate the public on the importance of economic development. This effort should take place during the final stage of the campaign to ensure that Chamber members who would otherwise not be able to contribute at the minimum campaign level will have the opportunity for involvement at a more comfortable amount, but that prospects won't opt for the lower level of involvement if given the option too early. The minimum contribution amounts for both the capital campaign and the general appeal to Chamber members will be decided by staff and campaign leadership with input from RDG upon campaign commencement.

RDG also conducted a broad screening of philanthropic foundations in order to identify possible outside funding sources. No potential revenue from philanthropic foundations was factored into the setting of the above target funding goal, but there are available opportunities for funding partnerships with foundations that must not be overlooked and should be investigated as part of any funding initiative. Appendix E contains a detailed listing of foundations that have been identified as promising funding partners

because of an expressed interest in community and/or economic development, geographic focus, or mission.

Based on our assessment interviews, program analysis, and examination of funding feasibility, RDG recommends that the boards of directors of the Union County Chamber of Commerce and the Community Improvement Corporation select RDG's full campaign management approach. This fundraising model will fully utilize RDG's capabilities and methodologies to mobilize current and new investors while allowing UCEDP staff to continue their full-time economic development activities. While volunteer leadership and staff assistance will be crucial in securing a successful campaign outcome, RDG will conduct and manage all aspects of the campaign effort.

The following issues must be addressed by the appropriate staff, boards, and organizational leadership prior to launching any funding campaign:

1. Clarification of organizational and governance structure.
2. Current and future budget allocations.
3. Campaign leadership structure, co-chairs, and council.
4. Roles and responsibilities of Campaign Council members in leading the campaign.

## *Proposed Campaign Timeline*

## Appendix A: Community Assessment Participants

Resource Development Group conducted confidential interviews with 74 individuals representing 53 companies, organizations, or governmental jurisdictions. The following lists identify these participants by alphabetical order, industry sector, and organizational involvement, if any.

### Community Assessment Participants

|                   |  |
|-------------------|--|
| Sandra Adkins     | Village of Plain City                              |
| Ann Aquillo       | The Scotts Miracle-Gro Company                     |
| Brain Ball        | Huntington National Bank                           |
| Dan Behrens       | Marysville Newspaper, Inc.                         |
| Jeff Benton       | Delaware County Bank                               |
| Jenny Brill       | Rummel Brill Ins.                                  |
| Bob Buckley       | Holbrook & Manter CPA's Professional Services Firm |
| Dave Burke        | Dave's Pharmacy                                    |
| Joe Chapman       | Chapman Ford                                       |
| Christy Clark     | Union County Chamber of Commerce                   |
| Jesse Conrad      | Conrad, Leibold, Maxhimer & Company                |
| Dave Cook         | Cook Real Estate                                   |
| Jim Cox           | McCarthy Cox Retirement & Estate Specialists, LLC  |
| James Craycraft   | Fairbanks Local School District                    |
| Bruce Daniels     | Honda Marysville and Honda MotorSports             |
| Joe Duke          | Joe Duke Insurance                                 |
| Chuck Dyas        | Kegler, Brown, Hill & Ritter                       |
| Spence Fisher     | Memorial Hospital of Union County                  |
| Dan Fitzgerald    | McAuliffe's Ace Hardware                           |
| Jillian Froment   | City of Marysville                                 |
| Tim Garrett       | Honda of America Mfg., Inc.                        |
| John Gore         | City of Marysville                                 |
| Ray Graves        | Marysville's First Federal Community Bank          |
| Charles Hall      | Union County Commissioner                          |
| Pat Hamilton      | Pat's Print Shop                                   |
| Steve Hilbert     | Village of Plain City                              |
| Glenn Hochstetler | Hochstetler Building                               |
| Chad Hoffman      | Richwood Banking Company                           |
| John Hoskins      | Hoskins-Hamilton Farm                              |
| Kim Hott          | Uptown Antiques                                    |

|                  |  |
|------------------|--|
| Kathy House      | City of Marysville                                 |
| Chip Hubbs       | Memorial Hospital of Union County                  |
| Tom Irelan       | DBS Companies, Inc.                                |
| Mike Karcher     | Richwood Banking Company                           |
| Bill Kelley      | Dayton Power & Light Company                       |
| Tim Kelton       | Ruscilli Real Estate Services, Inc.                |
| Steve Kopec      | Dutch Kitchen                                      |
| Gary Lee         | Union County Commissioner                          |
| Tara Lester      | Wal-Mart Store #01-1595                            |
| Randy Marker     | Thomas & Marker Construction Co.                   |
| Tom McCarthy     | Union County Commissioner                          |
| Matt McCollister | Columbus Chamber                                   |
| Ryan McDonnell   | Marysville Public Library                          |
| Bob Meeder       | Doc Henderson's Restaurant                         |
| Liz Meeder       | Doc Henderson's Restaurant                         |
| Bob Merkle       | Jerome Township                                    |
| Bill Nibert      | Village of Richwood                                |
| Karen Page       | Page Engineering, Inc.                             |
| Steve Pagura     | The Pagura Company, Inc.                           |
| Larry Parrish    | Union County Department of Jobs & Family Services  |
| Caroline Ramsey  | Honda of America Mfg., Inc.                        |
| Brian Ravencraft | Holbrook & Manter CPA's Professional Services Firm |
| Rob Ryan         | Ruscilli Real Estate Services, Inc.                |
| Chris Schmenk    | City of Marysville                                 |
| Dennis Schulze   | Schulze, Howard & Cox Attorneys at Law             |
| Greg Sehnert     | Nuckles Sehnert Insurance                          |
| Rick Shortell    | Union Rural Electric Cooperative, Inc.             |
| Wayne Simmons    | Velocys  |
| Stephen Smith    | Holbrook & Manter CPA's Professional Services Firm |
| Evan Smith       | National City Bank                                 |
| Jeff Sprague     | Transportation Research Center, Inc.               |
| Jason Stanford   | Union County Chamber of Commerce                   |
| Steve Stolte     | Union County Engineer                              |
| Luke Streng      | Real Living Business                               |
| Bryan Thompson   | Veyance Technologies, Inc.                         |
| Dave Thorbahn    | Select Sires                                       |
| Dave Vollrath    | Union County Foundation                            |
| Bob Ward         | Wardrobe II  |
| Bob Whitman      | Union County Chamber of Commerce                   |
| Peg Wiley        | Village of Richwood                                |

Carman Wirtz  
Roger Yoder  
Ross Youngs  
Holly Zachariah  
Larry Zimmerman

Memorial Hospital of Union County  
Union Rural Electric Cooperative, Inc.  
Univenture, Inc.  
Columbus Dispatch  
Marysville Exempted Village School District

## Assessment Participants by Industry Sector

### Accounting/ Business Services (2)

- Conrad, Leibold, Maxhimer & Company
- Holbrook & Manter CPA's Professional Services Firm

### Agriculture (2)

- Hoskins-Hamilton Farms
- Select Sires

### Architects/Engineering (2)

- Page Engineering
- Union County Engineer

### Attorneys (1)

- Schulze Howard & Cox Attorneys at Law

### Automotive (4)

- Chapman Ford
- Honda Marysville
- Honda of America Mfg., Inc.
- Transportation Research Center, Inc.

### Banking (5)

- Huntington National Bank
- Delaware County Bank
- Marysville's First Federal Community Bank
- Richwood Banking Company
- National City Bank

### Contractors (3)

- Hochstetler Building
- Thomas & Marker Construction Co.
- The Pagura Company, Inc.

### Education (2)

- Fairbanks Local School District
- Marysville Exempted Village School District

#### Financial Planning/ Investments (1)

- McCarthy Cox Retirement & Estate Specialists, LLC

#### Foundations (1)

- Union County Foundation

#### Government (6)

- City of Marysville
- Jerome Township
- Union County Commissioners
- Union County Department of Job & Family Services
- Village of Plain City
- Village of Richwood

#### Healthcare (2)

- Dave's Pharmacy
- Memorial Hospital of Union County

#### Manufacturing (4)

- The Scotts Miracle-Gro Company
- Velocys
- Veyance Technologies, Inc.
- Univenture, Inc.

#### Media (2)

- Marysville Newspaper, Inc.
- Columbus Dispatch

#### Miscellaneous (5)

- Columbus Chamber
- Doc Henderson's Restaurant
- Dutch Kitchen
- Marysville Public Library
- Union County Chamber of Commerce

#### Real Estate (2)

- Cook Real Estate
- Real Living Business

#### Real Estate Developers (2)



- DBS Companies, Inc.
- Ruscilli Real Estate Services, Inc.

Retail (5)

- McAuliffe's Ace Hardware
- Pat's Print Shop
- Uptown Antiques
- Wal-Mart Store #01-1595
- Wardrobe II

Utilities (2)

- Dayton Power & Light Company
- Union Rural Electric Cooperative, Inc.

## Community Assessment Participant Matrix

| Name            | Company  | Industry                       | Sector  | UCEDP    | Chamber | Committee                            |
|-----------------|--|--------------------------------|---------|----------|---------|--------------------------------------|
|                 |  |                                |         | Investor | Member  | Member                               |
| Sandra Adkins   | Village of Plain City                              | Government                     | Public  | Yes      | Yes     | CIC, EDAP, Plain City ED Team & UPKO |
| Ann Aquillo     | The Scotts Miracle-Gro Company                     | Manufacturing                  | Private | Yes      | Yes     | COC, CIC                             |
| Brain Ball      | Huntington National Bank                           | Banking                        | Private | No       | Yes     | CIC, EDAP & URT                      |
| Dan Behrens     | Marysville Newspaper, Inc.                         | Media                          | Private | No       | Yes     |                                      |
| Jeff Benton     | Delaware County Bank                               | Banking                        | Private | No       | Yes     |                                      |
| Jenny Brill     | Rummel Brill Ins.                                  | Insurance                      | Private | No       | Yes     |                                      |
| Bob Buckley     | Holbrook & Manter CPA's Professional Services Firm | Accounting/ Business Services  | Private | No       | Yes     |                                      |
| Dave Burke      | Dave's Pharmacy                                    | Healthcare                     | Private | No       | Yes     | EDAP                                 |
| Joe Chapman     | Chapman Ford                                       | Automotive                     | Private | No       | No      |                                      |
| Christy Clark   | Union County Chamber of Commerce                   | Miscellaneous                  | N/A     | N/A      | N/A     | N/A                                  |
| Jesse Conrad    | Conrad, Leibold, Maxhimer & Company                | Accounting/ Business Services  | Private | No       | Yes     | CIC                                  |
| Dave Cook       | Cook Real Estate                                   | Real Estate                    | Private | No       | Yes     |                                      |
| Jim Cox         | McCarthy Cox Retirement & Estate Specialists, LLC  | Financial Planning/Investments | Private | No       | Yes     | URT                                  |
| James Craycraft | Fairbanks Local School District                    | Education                      | Public  | No       | Yes     | TIRC-Tax Incentive Review Council    |
| Bruce Daniels   | Honda Marysville and Honda MotorSports             | Automotive                     | Private | Yes      | Yes     | COC, Town Run Committee              |
| Joe Duke        | Joe Duke Insurance                                 | Insurance                      | Private | No       | Yes     | COC, EDAP & URT                      |
| Chuck Dyas      | Kegler, Brown, Hill & Ritter                       | Attorneys                      | Private | No       | Yes     | Legislative Committee                |
| Spence Fisher   | Memorial Hospital of Union County                  | Healthcare                     | Public  | Yes      | Yes     | CIC                                  |
| Dan Fitzgerald  | McAuliffe's Ace Hardware                           | Retail                         | Private | No       | Yes     |                                      |

|                   |   |                        |         |     |     |   |
|-------------------|---|------------------------|---------|-----|-----|---|
| Jillian Froment   | City of Marysville                        | Government             | Public  | Yes | Yes | Team Union County, & Town Run Committee |
| Tim Garrett       | Honda of America Mfg., Inc.               | Automotive             | Private | Yes | Yes | COC, EDAP                               |
| John Gore         | City of Marysville                        | Government             | Public  | Yes | Yes | TIRC                                    |
| Ray Graves        | Marysville's First Federal Community Bank | Banking                | Private | No  | Yes |   |
| Charles Hall      | Union County Commissioner                 | Government             | Public  | Yes | Yes |   |
| Pat Hamilton      | Pat's Print Shop                          | Retail                 | Private | No  | Yes | CIC & Team Union County                 |
| Steve Hilbert     | Village of Plain City                     | Government             | Public  | Yes | Yes | Plain City ED Team                      |
| Glenn Hochstetler | Hochstetler Building                      | Contractors            | Private | No  | Yes | EDAP                                    |
| Chad Hoffman      | Richwood Banking Company                  | Banking                | Private | No  | Yes |   |
| John Hoskins      | Hoskins-Hamilton Farm                     | Agricultural           | Private | No  | Yes | COC & Legislative Committee             |
| Kim Hott          | Uptown Antiques                           | Retail                 | Private | No  | No  | URT                                     |
| Kathy House       | City of Marysville                        | Government             | Public  | Yes | Yes | URT                                     |
| Chip Hubbs        | Memorial Hospital of Union County         | Healthcare             | Public  | Yes | Yes | COC                                     |
| Tom Irelan        | DBS Companies, Inc.                       | Real Estate Developers | Private | No  | Yes |   |
| Mike Karcher      | Richwood Banking Company                  | Banking                | Private | No  | Yes | CIC                                     |
| Bill Kelley       | Dayton Power & Light Company              | Utilities              | Private | Yes | Yes | EDAP                                    |
| Tim Kelton        | Ruscilli Real Estate Services, Inc.       | Real Estate Developers | Private | No  | No  |   |
| Steve Kopec       | Dutch Kitchen                             | Miscellaneous          | Private | No  | Yes | COC                                     |
| Gary Lee          | Union County Commissioner                 | Government             | Public  | Yes | Yes | COC, CIC, EDAP                          |
| Tara Lester       | Wal-Mart Store #01-1595                   | Retail                 | Private | No  | Yes | Town Run Committee                      |
| Randy Marker      | Thomas & Marker Construction Co.          | Contractors            | Private | No  | Yes |   |
| Tom McCarthy      | Union County Commissioner                 | Government             | Public  | Yes | Yes | TIRC                                    |
| Matt McCollister  | Columbus Chamber                          | Miscellaneous          | N/A     | N/A | N/A | N/A                                     |

|                  |  |                               |         |     |     |                         |
|------------------|--|-------------------------------|---------|-----|-----|-------------------------|
| Ryan McDonnell   | Marysville Public Library                          | Miscellaneous                 | Public  | No  | Yes | Team Union County & URT |
| Bob Meeder       | Doc Henderson's Restaurant                         | Miscellaneous                 | Private | No  | Yes | Town Run Committee      |
| Liz Meeder       | Doc Henderson's Restaurant                         | Miscellaneous                 | Private | No  | Yes | Team Union County & URT |
| Bob Merkle       | Jerome Township                                    | Government                    | Public  | No  | Yes | CIC                     |
| Bill Nibert      | Village of Richwood                                | Government                    | Public  | Yes | Yes | COC & EDAP              |
| Karen Page       | Page Engineering, Inc.                             | Architects/Engineering        | Private | No  | Yes | URT                     |
| Steve Pagura     | The Pagura Company, Inc.                           | Contractors                   | Private | No  | Yes | CIC                     |
| Larry Parrish    | Union County Department of Jobs & Family Services  | Government                    | Public  | No  | Yes | BEWT                    |
| Caroline Ramsey  | Honda of America Mfg., Inc.                        | Automotive                    | Private | Yes | Yes | CIC                     |
| Brian Ravencraft | Holbrook & Manter CPA's Professional Services Firm | Accounting/ Business Services | Private | No  | Yes |                         |
| Rob Ryan         | Ruscilli Real Estate Services, Inc.                | Real Estate Developers        | Private | No  | No  |                         |
| Chris Schmenk    | City of Marysville                                 | Government                    | Public  | Yes | Yes | COC, CIC, EDAP          |
| Dennis Schulze   | Schulze, Howard & Cox Attorneys at Law             | Attorneys                     | Private | No  | Yes | EDAP & URT              |
| Greg Sehnert     | Nuckles Sehnert Insurance                          | Insurance                     | Private | No  | Yes |                         |
| Rick Shortell    | Union Rural Electric Cooperative, Inc.             | Utilities                     | Private | Yes | Yes | COC, CIC, EDAP          |
| Wayne Simmons    | Velocys  | Manufacturing                 | Private | No  | Yes |                         |
| Stephen Smith    | Holbrook & Manter CPA's Professional Services Firm | Accounting/ Business Services | Private | No  | Yes | CIC & Team Union County |
| Evan Smith       | National City Bank                                 | Banking                       | Private | No  | Yes | Town Run Committee      |
| Jeff Sprague     | Transportation Research Center, Inc.               | Automotive                    | Private | No  | Yes |                         |
| Jason Stanford   | Union County Chamber of Commerce                   | Miscellaneous                 | N/A     | N/A | N/A | N/A                     |
| Steve Stolte     | Union County Engineer                              | Government                    | Public  | Yes | Yes | COC, CIC & EDAP         |
| Luke Streng      | Real Living Business                               | Real Estate                   | Private | No  | Yes | BEWT                    |

|                 |   |               |         |     |     |                         |
|-----------------|---|---------------|---------|-----|-----|-------------------------|
| Bryan Thompson  | Veyance Technologies, Inc.                  | Manufacturing | Private | No  | Yes |                         |
| Dave Thorbahn   | Select Sires                                | Agricultural  | Private | No  | Yes | COC                     |
| Dave Vollrath   | Union County Foundation                     | Foundations   | Public  | No  | No  | Town Run Committee      |
| Bob Ward        | Wardrobe II                                 | Retail        | Private | No  | Yes | URT                     |
| Bob Whitman     | Union County Chamber of Commerce            | Miscellaneous | N/A     | N/A | N/A | N/A                     |
| Peg Wiley       | Village of Richwood                         | Government    | Public  | Yes | Yes | CIC & Team Union County |
| Carman Wirtz    | Memorial Hospital of Union County           | Healthcare    | Public  | Yes | Yes | BEWT                    |
| Roger Yoder     | Union Rural Electric Cooperative, Inc.      | Utilities     | Private | Yes | Yes |                         |
| Ross Youngs     | Univenture, Inc.                            | Manufacturing | Private | No  | No  |                         |
| Holly Zachariah | Columbus Dispatch                           | Media         | Private | No  | No  |                         |
| Larry Zimmerman | Marysville Exempted Village School District | Education     | Public  | Yes | Yes | COC, EDAP, TIRC         |

## *Appendix B: Community Assessment Pre-Case*

















## *Appendix C: Community Assessment Questionnaire*











## *Appendix D: Sample Investor Benefits*

### **PARTNER BENEFITS**

#### **PLATINUM LEVEL (\$25,000 + Annually)**

- Official Sponsor of Annual Meeting with organizational logo on materials
- Organizational logo featured on Home Page
- New Company Reception Sponsor
- Enhanced Listing on Website Investor List with Link
- Invitation to Press Conferences and Special Events
- Featured in Investor Directory
- Investor Only Meetings
- Monthly E-mail Communications
- Involvement/Participation in special projects

#### **GOLD LEVEL (\$10,000+ Annually)**

- Official Sponsor of Annual Meeting with organizational logo on materials
- Organizational logo featured on Home Page
- New Company Reception Sponsor
- Enhanced Listing on Website Investor List with Link
- Invitation to Press Conferences and Special Events
- Featured in Investor Directory
- Investor Only Meetings
- Monthly E-mail Communications
- Involvement/Participation on Taskforces

#### **SILVER LEVEL (\$5,000+ Annually)**

- Organizational logo featured on Home Page
- New Company Reception Sponsor
- Enhanced Listing on Website Investor List with Link
- Invitation to Press Conferences and Special Events
- Featured in Investor Directory
- Investor Only Meetings
- Monthly E-mail Communications
- Involvement/Participation on Taskforces

### **BRONZE LEVEL (\$2,500+ Annually)**

- Listing on Website Investor List with Link
- Invitation to Press Conferences and Special Events
- Featured in Investor Directory
- Investor Only Meetings
- Monthly E-mail Communications
- Involvement/Participation on Taskforces

### **TITANIUM LEVEL (\$1,000+ Annually)**

- Listing on Website Investor List
- Featured in Investor Directory
- Investor Only Meetings
- Monthly E-mail Communications
- Involvement/Participation on Taskforces

### **COPPER LEVEL (\$500+ Annually)**

- Listing on Website Investor List
- Featured in Investor Directory
- Investor Only Meetings
- Monthly E-mail Communications
- Involvement/Participation on Taskforces

## *Appendix E: Philanthropic Foundation Screen*

The following list of potential foundation prospects was compiled using the Foundation Directory Online, a research database offered by The Foundation Center. The following 45 foundations were identified as potential sources for grants for operational support or specific program efforts using parameters that included geographic focus, fields of interest, and whether they were self-described funders of community and/or economic development. Inclusion in this list is by no means an indication of expressed interest in funding the UCEDP, the Chamber, or any of its subsidiary programs. Further effort must be invested in order to determine the actual likelihood of cultivating and securing foundation funding support and involvement from any of these entities.

Potential projects that may be of particular interest to foundations include:

- 1) Operational expenses of the Union County Economic Development Partnership
- 2) Planning and development of a locally-based institution of higher education
- 3) Workforce training efforts
- 4) Program support for a Downtown Revitalization program and staffing for a Downtown Development Director or project manager
- 5) Execution of downtown revitalization efforts, such as façade improvements and redevelopment projects
- 6) Projects to improve manufacturing and technology competitiveness

### **1) The Alpaugh Foundation**

525 Vine St., Ste. 1925

Cincinnati, OH 45202-3121

#### **Type of Grantmaker**

Independent foundation

**IRS Exemption Status:** 501(c)(3)

**Additional Descriptor:** Family foundation

**Financial Data** (yr. ended 6/30/07): Assets: \$3,266,352; Total giving: \$243,060

EIN: 316314074

**990-PF:** [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

**Last Updated:** 4/9/2008

#### **Donor(s)**

Peter A. Alpaugh

## **Background**

Established in 1986 in OH.

## **Limitations**

Applications not accepted.  
Giving on a national basis.  
No grants to individuals.

## **Fields of Interest**

### **Subjects**

Arts  
Community/economic development  
Disasters, fire prevention/control  
Education  
Environment  
Federated giving programs  
Health organizations, association  
Human services  
Medical research  
Recreation  
Religion

## **Geographic Focus**

National

## **Application Information**

Contributes only to pre-selected organizations.

## **Officer**

Peter A. Alpaugh, Manager

## **Financial Data**

### **Year ended 6/30/07:**

Assets: \$3,266,352 (market value)  
Gifts received: \$375,347  
Expenditures: \$251,934  
Total giving: \$243,060  
Qualifying distributions: \$243,260

Giving activities include:  
\$243,060 for grants

### **Additional Location Information**

County: Hamilton

Metropolitan area: Cincinnati-Middletown, OH-KY-IN

### **Selected Grants**

The following grants were reported in 2005:

\$15,000 to Beech Acres, Cincinnati, OH, payable over 1 year.

\$10,000 to United Way, CA, payable over 1 year.

\$9,000 to Crossroads Church, Atlanta, GA, payable over 1 year.

\$1,750 to Fine Arts Fund, Cincinnati, OH, payable over 1 year.

\$1,000 to Media Research Center, Alexandria, VA, payable over 1 year.

\$500 to City CURE, Cincinnati, OH, payable over 1 year.

\$500 to Ronald McDonald House Charities of Phoenix, Phoenix, AZ, payable over 1 year.

\$250 to Talbert House, Cincinnati, OH, payable over 1 year.

\$217 to Walden Foundation, Louisville, KY, payable over 1 year.

\$100 to Jesuit Partnership, Milwaukee, WI, payable over 1 year.

## **2) The Bard Family Foundation**

c/o Pam B. Steel

1914 Randolph Dr.

Bryan, OH 43506-2253

**Type of Grantmaker:** Independent foundation

**IRS Exemption Status:** 501(c)(3)

**Financial Data** (yr. ended 12/31/06): Assets: \$689,350; Total giving: \$13,668

EIN: 810640045

**990-PF:** [2006](#) [2005](#) [2004](#) [2003](#)

**Last Updated:** 7/22/2007

### **Donor(s)**

Bard Manufacturing Co.

### **Background**

Established in 2003 in OH.

### **Limitations**

Giving primarily in OH.

### **Fields of Interest**

#### **Subjects**

Community/economic development  
Education

### **Geographic Focus**

Ohio

### **Officers**

Pamela Bard Steel, President  
Anne M. Bard, Vice President  
James R. Bard, Secretary-Treasurer

### **Director**

Richard O. Bard

### **Financial Data**

#### **Year ended 12/31/06:**

Assets: \$689,350 (market value)  
Gifts received: \$100,000  
Expenditures: \$14,692  
Total giving: \$13,668  
Qualifying distributions: \$13,668  
Giving activities include:  
\$13,668 for grants

### **Additional Location Information**

County: Williams

## **3) Battelle**

(formerly Battelle Memorial Institute)  
505 King Ave.  
Columbus, OH 43201-2693  
Telephone: (614) 424-7361



Contact: Ms. Adrienne N. Selsor, Corp. Philanthropy Mgr.

Fax: (614) 424-3301

URL: [www.battelle.org/community/Philanthropy/index.aspx](http://www.battelle.org/community/Philanthropy/index.aspx)

**Type of Grantmaker:** Public charity

**IRS Exemption Status:** 501(c)(3)

**Financial Data** (yr. ended 9/30/06): Assets: \$1,113,161,318; Total giving: \$9,954,442

EIN: 314379427

**990:** [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

**Last Updated:** 12/27/2007

### **Background**

Established in 2001 in OH.

### **Limitations**

Giving primarily in OH.

### **Purpose and Activities**

Battelle is dedicated to improving the quality of life where its customers and employees live and work. It fulfills this commitment by distributing a percentage of its annual income to nonprofit organizations which support improved education, arts and cultural programming, civic development, and health and human services. Battelle encourages the development of community partnerships by promoting employee involvement in volunteer service and providing organizations with cash and in-kind distributions. Education is one of Battelle's founding purposes, with support to science, math, engineering, and technology education a special focus given its work in innovation and research.

### **Fields of Interest**

#### **Subjects**

Arts

Community/economic development

Community development, business promotion

Education

Elementary/secondary education

Engineering school/education

Federated giving programs

Goodwill Industries

Health care

Higher education

Human services

Museums  
Performing arts  
YM/YWCAs & YM/YWHAs

### **Geographic Focus**

Ohio

### **Types of Support**

Annual campaigns  
Building/renovation  
Capital campaigns  
Curriculum development  
In-kind gifts  
Matching/challenge support  
Research  
Scholarship funds

### **Publications**

Annual report  
Application guidelines

### **Application Information**

Application form not required.  
Applicants should submit the following:

1. Brief history of organization and description of its mission
2. Detailed description of project and amount of funding requested
3. How project's results will be evaluated or measured
4. Listing of additional sources and amount of support
5. Copy of most recent annual report/audited financial statement/990
6. Listing of board of directors, trustees, officers and other key people and their affiliations
7. Copy of IRS Determination Letter

Initial approach: Letter or proposal

Copies of proposal: 1

Board meeting date(s): As needed

Deadline(s): None

Final notification: Varies

## **Officers and Directors**

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

John B. McCoy,\* Chairperson  
Carl F. Kohrt, President and Chief Executive Officer  
I. Martin Inglis, Executive Vice President  
Jeffrey Wadsworth,\* Executive Vice President  
Russ Austin, Sr. Vice President and Secretary  
Richard C. Adams, Sr. Vice President  
John J. Grossenbacher,\* Sr. Vice President  
Anthony T. Hebron,\* Sr. Vice President  
Stephen E. Kelly, Sr. Vice President  
Donald P. McConnell, Sr. Vice President  
Dennis V. McGinn, Sr. Vice President  
Steven D. McLaughlin, Sr. Vice President  
Leonard K. Peters,\* Sr. Vice President  
Robert W. Smith, Jr., Sr. Vice President  
Stephen H. Valentine, Controller  
Gwendolyn C. Von Holten, Treasurer  
Vicky A. Bailey  
Bernadine P. Healy  
Russell Hulse  
Genl. Lester L. Lyles  
W. George Meredith  
Sean O'Keefe  
Robert D. Walter  
John K. Welch

## **Number of Staff**

20000 unspecified staff

## **Memberships**

### **Regional Associations of Grantmakers**

Ohio Grantmakers Forum

## **Financial Data**

### **Year ended 9/30/06:**

Revenue: \$3,806,286,465

Assets: \$1,113,161,318 (market value)

Gifts received: \$2,999,298,954  
Expenditures: \$3,765,268,838  
Total giving: \$9,954,442  
Program services expenses: \$3,014,205,959  
Giving activities include:  
\$9,925,703 for grants  
\$28,739 for in-kind gifts

#### **Additional Location Information**

County: Franklin  
Metropolitan area: Columbus, OH

#### **4) Battelle Charities**

c/o The Columbus Foundation  
1234 E. Broad St.  
Columbus, OH 43205-1405  
**Type of Grantmaker:** Public charity  
**IRS Exemption Status:** 501(c)(3)  
**Additional Descriptor:** Supporting organization  
**Financial Data** (yr. ended 12/31/06): Assets: \$8,672,272  
EIN: 311772342  
990: [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)  
**Last Updated:** 1/13/2008

#### **Background**

Established in 2001 in OH; supporting organization of the Columbus Foundation.

#### **Limitations**

Applications not accepted.  
Giving limited to OH.

#### **Purpose and Activities**

Battelle Charities extends the philosophy of technological and scientific innovation and economic development to Battelle's longstanding charitable commitment to the community.

#### **Fields of Interest**

**Subjects**

Community/economic development

**Geographic Focus**

Ohio

**Application Information**

Contributes only to a pre-selected organization; unsolicited requests for funds not considered or acknowledged.

**Officers and Trustees**

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

Carl F. Kohrt,\* Chairperson

Jerome R. Bahlmann,\* President

E. Linn Draper, Jr.,\* Secretary

Jeffrey M. Wilkins,\* Treasurer

Michael F. Curtin

Karen Holbrook

I. Martin Inglis

Robert J. Massie

**Financial Data****Year ended 12/31/06:**

Revenue: \$33,000

Assets: \$8,672,272 (market value)

Expenditures: \$27,042

**Additional Location Information**

County: Franklin

Metropolitan area: Columbus, OH

**5) Cardinal Health, Inc. Corporate Giving Program**

c/o Cardinal Health Fdn.

7000 Cardinal Pl.

Dublin, OH 43017-1091

Telephone: (614) 757-7450

Contact: Deborah Hadley, Exec. Dir., Cardinal Health Fdn.

Fax: (614) 757-8871

E-mail: [cardinalfoundation@cardinal.com](mailto:cardinalfoundation@cardinal.com)

URL: [www.cardinal.com/aboutus/what/community/index.asp](http://www.cardinal.com/aboutus/what/community/index.asp)

**Type of Grantmaker:** Corporate giving program

**Last Updated:** 1/26/2005

### **Limitations**

Giving on a national basis.

No support for discriminatory organizations, religious organizations not of direct benefit to the entire community, right to life organizations, or churches.

No grants to individuals (except for employee-related scholarships)

### **Purpose and Activities**

As a complement to its foundation, Cardinal Health also makes charitable contributions to nonprofit organizations directly. Support is given on a national basis.

### **Fields of Interest**

#### **Subjects**

Arts

Community/economic development

Health care

Human services

### **Geographic Focus**

National

### **Types of Support**

Donated products

Employee-related scholarships

Program development

### **Application Information**

Letters of inquiry should be no longer than 2 to 3 pages.

Application form not required.

Applicants should submit the following:

1. How project will be sustained once grantmaker support is completed
2. Results expected from proposed grant
3. Statement of problem project will address
4. Population served

5. How project's results will be evaluated or measured
6. Explanation of why grantmaker is considered an appropriate donor for project
7. Descriptive literature about organization
8. Detailed description of project and amount of funding requested

Initial approach: Letter of inquiry to nearest company facility; letter of inquiry to headquarters for national organizations

Copies of proposal: 1

Deadline(s): None

Final notification: Following review

### **Memberships**

#### **Regional Associations of Grantmakers**

Ohio Grantmakers Forum

### **Additional Location Information**

County: Franklin

Metropolitan area: Columbus, OH

## **6) The Clinic Foundation**

90 Jackson Pike

Gallipolis, OH 45631-9833

Telephone: (740) 446-5184

Contact: Janice Henry

**Type of Grantmaker:** Independent foundation

**IRS Exemption Status:** 501(c)(3)

**Financial Data** (yr. ended 12/31/06): Assets: \$8,159; Total giving: \$197,495

EIN: 311073552

**990-PF:** [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

**Last Updated:** 8/27/2007

### **Donor(s)**

Holzer Clinic, Inc.

J. Craig Strafford

T. Wayne Munro

### **Background**

Established in 1994 in OH and WV.

### **Limitations**

Giving primarily in OH; some giving also in WV.

### **Fields of Interest**

#### **Subjects**

Arts  
Christian agencies & churches  
Community/economic development  
Education  
Federated giving programs  
Health care  
Human services  
Recreation

### **Geographic Focus**

Ohio  
West Virginia

### **Application Information**

Deadline(s): None

### **Officers**

T. Wayne Munro, M.D., President  
Jon M. Sullivan, M.D., Vice President  
Robert E. Daniel, Admin.

### **Financial Data**

#### **Year ended 12/31/06:**

Assets: \$8,159 (market value)  
Gifts received: \$201,601  
Expenditures: \$197,520  
Total giving: \$197,495  
Qualifying distributions: \$197,520  
Giving activities include:  
\$197,495 for 215 grants (high: \$50,000; low: \$10)

### **Additional Location Information**

County: Gallia



## **7) The Columbus Foundation and Affiliated Organizations**

(formerly The Columbus Foundation)

1234 E. Broad St.

Columbus, OH 43205-1453

Telephone: (614) 251-4000

Contact: Raymond J. Biddiscombe, V.P., Finance

Fax: (614) 251-4009

E-mail: [tcinfo@columbusfoundation.org](mailto:tcinfo@columbusfoundation.org)

URL: [www.columbusfoundation.org](http://www.columbusfoundation.org)

**Type of Grantmaker:** Community foundation

**IRS Exemption Status:** 501(c)(3)

**Financial Data** (yr. ended 12/31/06): Assets: \$978,912,995; Total giving: \$72,252,894

EIN: 316044264

**990:** [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

[E-Grant Reporter](#)

**Last Updated:** 2/22/2008

### **Additional Contact Information**

Additional e-mail: [rbiddisc@columbusfoundation.org](mailto:rbiddisc@columbusfoundation.org)

### **Background**

Established in 1943 in OH by resolution and declaration of trust.

### **Limitations**

Giving limited to central OH.

No support for religious purposes, or for projects normally the responsibility of a public agency.

No grants to individuals, or generally for budget deficits, conferences, scholarly research, or endowment funds.

### **Purpose and Activities**

The foundation seeks to assist donors and others in strengthening and improving the community for the benefits of all its citizens. Grants are made to strengthen existing agencies or to initiate new programs in the following categories: arts and humanities, urban affairs, conservation and environmental protection, education, health, mental health and the developmentally disabled, and social service agencies.

### **Program Area(s)**

The grantmaker has identified the following area(s) of interest:

### **Advancing Philanthropy**

The foundation supports programs that encourage giving and volunteering, and those that increase public awareness of the importance of philanthropy.

### **Arts and Humanities**

The foundation supports programs that further the enjoyment and understanding of the visual, literal, performing, folk, or media arts, and that promote participation in arts activities and events. Grants in this field consist of operating support for major arts organizations, community grants, and funding for special projects. Due to the diversity and range of art initiatives, projects, and organizations, funding for arts and humanities occurs through the Major Arts Organizations and Community Arts Grants.

### **Conservation**

The foundation supports programs and education related to the preservation of the environment, conservation of natural resources, and protection of wildlife. This field also includes proposals related to natural habitats, botanical gardens, and animal welfare and protection.

### **Education**

The foundation supports the continuum of learning for people of all ages, including early childhood, preschool, primary and secondary grades, higher education, vocational education, and continuing and adult education. Grants in this field also relate to parent training, academic enrichment, school-based support services for students, library services, community involvement in schools, and adult literacy.

### **Health**

The foundation supports the promotion wellness, health awareness, and prevention of disease. It also encompasses activities related to mental health, public health, school-linked health services, family planning, substance abuse, convalescent and home health care, nutrition, and child immunization.

### **Major Arts Organizations**

Arts organizations with budgets at or above \$350,000 per year can submit a Major Arts grants application. Criteria for awarding grants to major art organizations include financial stability, attendance, inclusiveness, artistic quality, leadership and overall administration. Visit foundation Web site for application form and guidelines.

### **Social Services**

The foundation supports family and individual development, and encompasses independent living and nonmedical services for the elderly and individuals with disabilities; emergency services, including transitional and other services for the homeless; parenting skills; and school-linked human services for children and adolescents.

### **Urban Affairs**

The foundation supports programs dealing with housing, community and economic

development, employment training, public safety, cross-cultural activities, citizen participation, and neighborhood life.

### **Fields of Interest**

#### **Subjects**

AIDS  
AIDS research  
Adult education--literacy, basic skills & GED  
Animal welfare  
Arts  
Child development, education  
Child development, services  
Civil rights, race/intergroup relations  
Community/economic development  
Disasters, Hurricane Katrina  
Economic development  
Education  
Education, association  
Education, reading  
Employment, training  
Environment  
Environment, energy  
Environment, natural resources  
Government/public administration  
Health care  
Health organizations, association  
Historic preservation/historical societies  
Homeless, human services  
Housing/shelter  
Humanities  
Human services  
Mental health/crisis services  
Performing arts  
Philanthropy/voluntarism  
Public affairs  
Reproductive health, family planning  
Voluntarism promotion  
Women, centers/services  
Youth, services

#### **Population Groups**

Disabilities, people with  
Economically disadvantaged  
Homeless  
Women

### **Geographic Focus**

Ohio

### **Types of Support**

Building/renovation  
Capital campaigns  
Continuing support  
Land acquisition  
Matching/challenge support  
Program development  
Publication  
Scholarship funds  
Seed money  
Technical assistance

### **Publications**

Annual report  
Application guidelines  
Informational brochure (including application guidelines)  
Newsletter

### **Application Information**

Visit foundation Web site for application, guidelines, and specific deadlines.

Application form required.

Applicants should submit the following:

1. Timetable for implementation and evaluation of project
2. How project will be sustained once grantmaker support is completed
3. Signature and title of chief executive officer
4. Results expected from proposed grant
5. Qualifications of key personnel
6. Statement of problem project will address
7. Copy of IRS Determination Letter
8. Brief history of organization and description of its mission
9. Copy of most recent annual report/audited financial statement/990

10. How project's results will be evaluated or measured
11. Descriptive literature about organization
12. Listing of board of directors, trustees, officers and other key people and their affiliations
13. Detailed description of project and amount of funding requested
14. Copy of current year's organizational budget and/or project budget
15. Listing of additional sources and amount of support

Initial approach: Submit proposal coversheet and attachments

Copies of proposal: 4

Board meeting date(s): Feb., Apr., May, July, Sept., Oct., and Dec.

Deadline(s): Varies

Final notification: Approximately 3 months after the given deadline

### **Officers and Governing Committee**

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

Ann Isaly Wolfe,\* Chairperson

David R. Meuse,\* Vice-Chairperson

Douglas F. Kridler,\* Chief Executive Officer and President

Raymond J. Biddiscombe, Vice President, Finance and Admin.

Lisa S. Courtice, Ph.D., Vice President, Community Research and Grants Management

Philip T. "Terry" Schavone, Vice President, Donor Services and Development

Renilda Marshall, Executive Secretary

Tanny Crane

John B. Gerlach, Jr.

Archie M. Griffin

Bruce A. Soll

Barbara Trueman

Frank Wobst

### **Trustee Banks**

The Huntington National Bank

JPMorgan Chase Bank, N.A.

KeyBank N.A.

National City Bank, Columbus

### **Number of Staff**

23 full-time professional

14 full-time support  
3 part-time support

### **Memberships**

#### **Regional Associations of Grantmakers**

Ohio Grantmakers Forum

#### **Affinity Groups**

Grantmakers In the Arts

Grantmakers for Education

Grantmakers for Effective Organizations

Neighborhood Funders Group

PRI Makers Network

#### **Associations and Other Philanthropic Organizations**

Council on Foundations

Independent Sector

### **Financial Data**

#### **Year ended 12/31/06:**

Assets: \$978,912,995 (market value)

Gifts received: \$107,069,978

Expenditures: \$79,199,760

Total giving: \$72,252,894

Giving activities include:

\$72,252,894 for grants

### **Additional Location Information**

County: Franklin

Metropolitan area: Columbus, OH

### **Selected Grants**

The following grants were reported in 2006:

\$10,000,000 to Arthur G. James Cancer Hospital and Richard J. Solove Research Institute, Columbus, OH. To support Power to Change Lives Campaign.

\$10,000,000 to Childrens Hospital Foundation, Columbus, OH. For Change Their Tomorrow Capital Campaign.

\$2,500,000 to Ohio Dominican University, Columbus, OH.

\$2,025,000 to Educational Council Foundation, Columbus, OH.

\$1,500,000 to Columbus Museum of Art, Columbus, OH. For capital campaign.

\$619,508 to United Way of Central Ohio, Columbus, OH.

\$25,000 to Access Health Columbus, Columbus, OH.

\$25,000 to Hands On Network, Atlanta, GA. For Corporate Services Council Compact of 100.

\$22,323 to Columbus Association for the Performing Arts, Columbus, OH. For annual support.

\$20,000 to Ohio State University Research Foundation, Columbus, OH. To expand Next Chapter Book Club for adults with mental retardation and developmental disabilities who also have hearing or visual impairments and for adolescents and young adults with mental retardation.

## **8) Community Foundation of Union County, Inc.**

(also known as Union County Foundation)

126 N. Main St.

P.O. Box 608

Marysville, OH 43040-0608

Telephone: (937) 642-9618

Contact: David A. Vollrath, Exec. Dir.

Fax: (937) 642-7376

E-mail: [info@unioncountyfoundation.org](mailto:info@unioncountyfoundation.org)

URL: [www.unioncountyfoundation.org](http://www.unioncountyfoundation.org)

**Type of Grantmaker:** Community foundation

**IRS Exemption Status:** 501(c)(3)

**Financial Data** (yr. ended 12/31/07): Assets: \$5,091,807; Total giving: \$1,000,076

EIN: 310628641

**990:** [2005](#) [2004](#) [2003](#) [2002](#)

**Last Updated:** 5/13/2008

### **Background**

Established in 1962 in OH.

### **Limitations**

Giving limited to Union County, OH.

No support for sectarian religious programs.

No grants to individuals (except from designated funds), or for buildings or equipment, endowments, fundraising campaigns, conferences, or annual meetings.

### **Purpose and Activities**

The foundation seeks to enhance the quality of life for all the citizens of Union County,

and to provide a vehicle whereby gifts of any size might be invested and used in perpetuity to that end.

### **Fields of Interest**

#### **Subjects**

Arts  
Education  
Environment  
Health care  
Higher education  
Recreation  
Religion

#### **Population Groups**

Aging  
Youth

### **Geographic Focus**

Ohio

### **Types of Support**

Continuing support  
Curriculum development  
General/operating support  
In-kind gifts  
Program development  
Scholarships--to individuals

### **Publications**

Annual report  
Application guidelines  
Grants list  
Informational brochure

### **Application Information**

Visit foundation Web site for application form and guidelines.

Application form required.

Applicants should submit the following:

1. Timetable for implementation and evaluation of project
2. How project will be sustained once grantmaker support is completed



3. Signature and title of chief executive officer
4. Qualifications of key personnel
5. Statement of problem project will address
6. Name, address and phone number of organization
7. Copy of IRS Determination Letter
8. Brief history of organization and description of its mission
9. Copy of most recent annual report/audited financial statement/990
10. How project's results will be evaluated or measured
11. Listing of board of directors, trustees, officers and other key people and their affiliations
12. Detailed description of project and amount of funding requested
13. Copy of current year's organizational budget and/or project budget

Initial approach: Phone or personal contact with Director

Copies of proposal: 1

Board meeting date(s): 3rd Thurs. of Feb., May, Aug., and Nov.

Deadline(s): Jan., Apr., July, and Oct.

Final notification: Quarterly

### **Officers and Trustees**

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

Thomas A. McCarthy,\* Chairperson  
 Greg Sehnert,\* Vice-Chairperson  
 J. Daniel Fitzgerald,\* Secretary-Treasurer  
 David A. Vollrath, Executive Director  
 David F. Allen, Counsel  
 Robert Buckley, Foundation, C.P.A.  
 Gary Conklin  
 Robin Craft  
 John Eufinger  
 Don Fraser  
 Barbara Holcomb  
 Thomas C. Kruse  
 Robert Lewis  
 John Linscott  
 Robert Meeder  
 Carolyn Mitchell

### **Number of Staff**

2 part-time professional

### **Memberships**

#### **Associations and Other Philanthropic Organizations**

Council on Foundations

### **Financial Data**

#### **Year ended 12/31/07:**

Assets: \$5,091,807 (market value)

Gifts received: \$969,186

Expenditures: \$1,158,476

Total giving: \$1,000,076

Giving activities include:

\$923,792 for 235 grants (high: \$80,833; low: \$29)

\$76,284 for 62 grants to individuals (high: \$3,000; low: \$125)

#### **Estimated financial data for year ending 12/31/08:**

Assets: \$5,200,000

Grants: \$450,000

### **Additional Location Information**

County: Union

Metropolitan area: Columbus, OH

### **Selected Grants**

The following grants were reported in 2007:

\$136,099 to Longstreth, Nelsonville, OH. For Union County Veterans Memorial Monument in Marysville, payable over 1 year.

\$25,000 to Pharisburg United Methodist Church, Marysville, OH. For donor advised distribution, payable over 1 year.

\$15,026 to Schorr Architects, Dublin, OH. For North Union District Veterans Memorial Monument, payable over 1 year.

\$9,163 to Tiffin Scenic Studios, Tiffin, OH. For curtains for Veterans Memorial Auditorium, payable over 1 year.

\$5,000 to Union County Agency Transportation Services (UCATS), Marysville, OH. For transportation for seniors, disabled and agency clients, payable over 1 year.

\$5,000 to Union County Personal Needs Pantry, Marysville, OH. For donor advised distribution, payable over 1 year.

\$2,500 to Marysville Food Pantry, Marysville, OH. For donor advised distribution,

payable over 1 year.

\$2,256 to YMCA, Union County Family, Marysville, OH. For health related programs, payable over 1 year.

\$1,000 to Memorial Hospital of Union County, Marysville, OH. To purchase 64 layer CT scanner, payable over 1 year.

\$500 to Marysville, City of, Marysville, OH. New Disc Park project, payable over 1 year.

## **9) James M. Cox, Jr. Foundation, Inc.**

4th and Ludlow Sts.

Dayton, OH 45402-0000

### **Type of Grantmaker**

Independent foundation

**IRS Exemption Status:** 501(c)(3)

**Additional Descriptor:** Family foundation

**Financial Data** (yr. ended 12/31/06): Assets: \$56,357,673; Total giving: \$1,186,000

EIN: 237256190

**990-PF:** [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

**Last Updated:** 1/24/2008

### **Additional Contact Information**

Application address: c/o Lee Ann Launius, Cox Enterprises, Inc., P.O. Box 105720, Atlanta, GA 30348, tel.: (678) 645-0000

### **Donor(s)**

*Note: If a donor is deceased, the symbol (‡) follows the name.*

James M. Cox, Jr.‡

Cox Enterprises, Inc.

### **Background**

Established in 1969 in GA.

### **Limitations**

Giving limited to cities where Cox Enterprises does business.

### **Purpose and Activities**

Giving primarily for higher education, as well as for a cancer institute, and community development.

## **Fields of Interest**

### **Subjects**

Animals/wildlife, preservation/protection  
Cancer  
Community/economic development  
Higher education  
Human services  
Scholarships/financial aid

## **Geographic Focus**

Areas of company operations

## **Types of Support**

Building/renovation  
Capital campaigns

## **Publications**

Application guidelines

## **Application Information**

Application form not required.

Applicants should submit the following:

1. Copy of IRS Determination Letter
2. Brief history of organization and description of its mission
3. Copy of most recent annual report/audited financial statement/990
4. Detailed description of project and amount of funding requested
5. Listing of additional sources and amount of support

Initial approach: Letter

Copies of proposal: 3

Board meeting date(s): Quarterly

Deadline(s): 1-month before meeting

## **Officers**

Barbara Cox Anthony, President

James Cox Kennedy, Vice President

Andrew A. Merdek, Secretary

John G. Bayotte, Treasurer

### **Director**

Barbara K. Harty

### **Number of Staff**

1 shared staff

### **Financial Data**

#### **Year ended 12/31/06:**

Assets: \$56,357,673 (market value)

Expenditures: \$1,521,200

Total giving: \$1,186,000

Qualifying distributions: \$1,186,000

Giving activities include:

\$1,186,000 for 26 grants (high: \$375,000; low: \$1,000)

### **Additional Location Information**

County: Montgomery

Metropolitan area: Dayton, OH

### **Selected Grants**

The following grants were reported in 2004:

\$250,000 to Ducks Unlimited, Memphis, TN, payable over 1 year.

\$250,000 to Little Star, Aspen, CO, payable over 1 year.

\$200,000 to African Wildlife Foundation, Washington, DC, payable over 1 year.

\$200,000 to Nature Conservancy, Arlington, VA, payable over 1 year.

\$130,000 to PATH Foundation, Atlanta, GA, payable over 1 year.

\$100,000 to Little Star, Aspen, CO, payable over 1 year.

\$50,000 to University of Georgia Foundation, Athens, GA, payable over 1 year.

\$30,000 to Wilderness Society, Washington, DC, payable over 1 year.

\$25,000 to Woodward Academy, Detroit, MI, payable over 1 year.

\$2,500 to Texas Tech University, Lubbock, TX, payable over 1 year.

## **10) Dana Corporation Foundation**

P.O. Box 1000

Toledo, OH 43697-1000

Telephone: (419) 535-4500

Contact: Ed McNeal

**Type of Grantmaker:** Company-sponsored foundation  
**IRS Exemption Status:** 501(c)(3)  
**Financial Data** (yr. ended 3/31/07): Assets: \$1,403,193; Total giving: \$732,019  
EIN: 346544909  
**990-PF:** [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)  
**Last Updated:** 5/15/2008

**Donor(s)**

Dana Corporation

**Background**

Incorporated in 1956 in OH.

**Limitations**

Giving primarily in areas of company operations.  
No grants to individuals (except for the Driveshaft Scholarship Fund), or for fellowships; no loans.

**Purpose and Activities**

The foundation supports organizations involved with arts and culture, education, health, human services, community development, international law, and government and public administration.

**Program Area(s)**

The grantmaker has identified the following area(s) of interest:

**Employee Matching Gifts**

The foundation matches contributions made by employees, directors, and retirees of Dana to educational institutions from \$25 to \$5,000 per contributor, per year.

**Fields of Interest**

**Subjects**

American Red Cross  
Arts  
Children/youth, services  
Community/economic development  
Education  
Federated giving programs  
Government/public administration  
Health care  
Higher education

Human services  
Law/international law

### **Geographic Focus**

Areas of company operations

### **Types of Support**

Annual campaigns  
Building/renovation  
Capital campaigns  
Continuing support  
Emergency funds  
Employee matching gifts  
Equipment  
General/operating support  
Land acquisition  
Scholarships--to individuals

### **Publications**

Informational brochure (including application guidelines)

### **Application Information**

Application form not required.  
Initial approach: Proposal  
Copies of proposal: 1  
Board meeting date(s): Apr., Aug., and Dec. or May, Sept., and Jan.  
Deadline(s): None  
Final notification: 60 to 90 days

### **Officers and Directors**

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

Mike Burns,\* President  
Anne Marie Riley,\* Vice President  
Joe Stancati,\* Secretary  
Cindy Simon, Treasurer  
Bob Fesenmyer

### **Number of Staff**

1 part-time professional

## **Memberships**

### **Associations and Other Philanthropic Organizations**

Council on Foundations

## **Financial Data**

### **Year ended 3/31/07:**

Assets: \$1,403,193 (market value)

Expenditures: \$747,660

Total giving: \$732,019

Qualifying distributions: \$734,269

Giving activities include:

\$538,120 for grants

\$4,000 for 2 grants to individuals of \$2,000 each (high: \$2,000; low: \$2,000)

\$189,899 for employee matching gifts

## **Additional Location Information**

County: Lucas

Metropolitan area: Toledo, OH

## **Selected Grants**

The following grants were reported in 2006:

\$115,234 to American Red Cross, Toledo, OH, payable over 1 year.

\$32,000 to United Way of the Lakeshore, Muskegon, MI, payable over 1 year.

\$25,000 to Junior Achievement of Northwestern Ohio, Toledo, OH, payable over 1 year.

\$25,000 to Public Broadcasting Foundation of Northwest Ohio, Toledo, OH, payable over 1 year.

\$21,950 to United Way of Allen County, Fort Wayne, IN, payable over 1 year.

\$15,500 to United Way of Grant County, Marion, IN, payable over 1 year.

\$13,000 to United Way of Greater Longview, Longview, TX, payable over 1 year.

\$10,798 to American Cancer Society, Jackson, TN, payable over 1 year.

\$10,000 to Hardin County Schools, Elizabethtown, KY, payable over 1 year.

\$10,000 to United Way of Henderson County, Henderson, KY, payable over 1 year.

## **11) Jackie & Bruce Davey Family Foundation**

c/o FirstMerit Bank, N.A.

39 Public Sq.

Medina, OH 44256-2297



Contact: Donald Miksch, Trust Off., FirstMerit Bank, N.A.

**Type of Grantmaker:** Independent foundation

**IRS Exemption Status:** 501(c)(3)

**Financial Data** (yr. ended 12/31/06): Assets: \$689,636; Total giving: \$27,065

EIN: 346941084

**990-PF:** [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

**Last Updated:** 1/13/2008

### **Donor(s)**

Bruce Davey

Jacqueline E. Davey

Peter B.W. Davey

### **Background**

Established in IA.

### **Limitations**

Giving in the U.S., primarily in OH; some giving also in Canada.

### **Fields of Interest**

#### **Subjects**

Community/economic development

Health care

Higher education

### **Geographic Focus**

Ohio

### **Types of Support**

General/operating support

### **Application Information**

Application form not required.

Deadline(s): None

### **Officers**

Jacqueline E. Davey, Manager

W. Bruce Davey, Manager

### **Trustee**

FirstMerit Bank, N.A.

### **Financial Data**

#### **Year ended 12/31/06:**

Assets: \$689,636 (market value)

Gifts received: \$34,753

Expenditures: \$34,919

Total giving: \$27,065

Qualifying distributions: \$27,065

Giving activities include:

\$27,065 for grants

### **Additional Location Information**

County: Medina

Metropolitan area: Cleveland-Elyria-Mentor, OH

## **12) The Dayton Power and Light Company Foundation**

1065 Woodman Dr.

Dayton, OH 45432-1423

Telephone: (937) 259-7925

Contact: Ginny Strausburg, Exec. Dir.

Fax: (937) 259-7923

**Type of Grantmaker:** Company-sponsored foundation

**IRS Exemption Status:** 501(c)(3)

**Financial Data** (yr. ended 12/31/06): Assets: \$28,821,777; Total giving: \$1,495,411

EIN: 311138883

**990-PF:** [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

**Last Updated:** 7/22/2007

### **Donor(s)**

The Dayton Power and Light Co.

### **Background**

Established in 1985 in OH.

### **Limitations**

Giving primarily in west central OH.

No support for religious, fraternal, labor, or veterans' organizations, national organizations, or sports leagues.

No grants to individuals, or for capital campaigns, endowments or developmental campaigns, general operating support for hospitals, or telephone or mass mail solicitations.

### **Purpose and Activities**

The foundation supports organizations involved with arts and culture, education, health, human services, and community development.

### **Fields of Interest**

#### **Subjects**

American Red Cross

Arts

Boy scouts

Business/industry

Community/economic development

Education

Federated giving programs

Girl scouts

Health care

Higher education

Historic preservation/historical societies

Human services

Media, television

Museums (art)

Performing arts, theater

Secondary school/education

### **Geographic Focus**

Ohio

### **Types of Support**

General/operating support

### **Publications**

Informational brochure (including application guidelines)

### **Application Information**

Application form not required.

Applicants should submit the following:

1. Copy of IRS Determination Letter
2. Brief history of organization and description of its mission
3. Copy of most recent annual report/audited financial statement/990
4. Detailed description of project and amount of funding requested
5. Copy of current year's organizational budget and/or project budget
6. Listing of additional sources and amount of support

Initial approach: Proposal

Copies of proposal: 1

Board meeting date(s): Quarterly

Deadline(s): None

### **Officers and Directors**

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

James F. Dicke, II,\* President

Jane G. Haley, Secretary

W. August Hillenbrand, Treasurer

Ginny Strausburg,\* Executive Director

Paul R. Bishop

Ernie Green

Ned J. Sifferlen

### **Number of Staff**

1 full-time professional

### **Memberships**

#### **Regional Associations of Grantmakers**

Ohio Grantmakers Forum

### **Financial Data**

#### **Year ended 12/31/06:**

Assets: \$28,821,777 (market value)

Expenditures: \$1,594,249

Total giving: \$1,495,411

Qualifying distributions: \$1,495,411

Giving activities include:  
\$1,495,411 for grants

### **Additional Location Information**

County: Greene

Metropolitan area: Dayton, OH

### **Selected Grants**

The following grants were reported in 2006:

\$100,000 to Wilberforce University, Wilberforce, OH, payable over 1 year.

\$50,000 to Dayton Art Institute, Dayton, OH, payable over 1 year.

\$50,000 to Salvation Army, payable over 1 year.

\$35,000 to Sinclair Community College, Dayton, OH, payable over 1 year.

\$30,000 to Cityfolk, Dayton, OH, payable over 1 year.

\$25,000 to University of Dayton, Dayton, OH, payable over 1 year.

\$20,000 to Girl Scouts of the U.S.A., payable over 1 year.

\$20,000 to YWCA of Dayton, Dayton, OH, payable over 1 year.

\$15,000 to Dayton Opera, Dayton, OH, payable over 1 year.

\$5,000 to Big Brothers/Big Sisters, payable over 1 year.

## **13) The Dewald Family Charitable Foundation, Inc.**

c/o S.R. Susskind

600 Vine St., Ste. 2800

Cincinnati, OH 45202-2409

**Type of Grantmaker:** Independent foundation

**IRS Exemption Status:** 501(c)(3)

**Financial Data** (yr. ended 12/31/06): Assets: \$1,293,175; Total giving: \$281,600

EIN: 311772229

**990-PF:** [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

**Last Updated:** 8/21/2007

### **Additional Contact Information**

Application address: c/o Margery Dewald Glaser, 10124 Stephens Young Rd., Camden, OH 43111, tel.: (937) 452-3082

### **Donor(s)**

Margery D. Glaser

## **Background**

Established in 2003 in OH.

## **Limitations**

Giving on a national basis.

## **Fields of Interest**

### **Subjects**

Arts

Economic development

Environment, natural resources

Holistic medicine

Jewish agencies & temples

### **Population Groups**

Indigenous people

## **Geographic Focus**

National

## **Application Information**

Application form not required.

Deadline(s): None

## **Officers**

Margery E. Glaser, President

Gary Glaser, Vice President

Reuben Glaser, Secretary-Treasurer

## **Financial Data**

### **Year ended 12/31/06:**

Assets: \$1,293,175 (market value)

Gifts received: \$105,404

Expenditures: \$300,894

Total giving: \$281,600

Qualifying distributions: \$284,004

Giving activities include:

\$281,600 for 5 grants (high: \$120,000; low: \$10,000)

## **Additional Location Information**

County: Hamilton

Metropolitan area: Cincinnati-Middletown, OH-KY-IN

## **14) The Diggs Family Foundation**

1515 Kettering Twr.

Dayton, OH 45423-1144

**Type of Grantmaker:** Independent foundation

**IRS Exemption Status:** 501(c)(3)

**Financial Data** (yr. ended 11/30/06): Assets: \$1,215,959; Total giving: \$51,000

**EIN:** 311423026

**990-PF:** [2007](#) [2006](#) [2005](#) [2004](#) [2002](#) [2001](#)

**Last Updated:** 7/22/2007

### **Donor(s)**

Matthew O. Diggs, Jr.

### **Background**

Established in 1994 in OH.

### **Limitations**

Applications not accepted.

Giving primarily in OH.

No grants to individuals.

### **Purpose and Activities**

Giving for education, the environment, youth services, and community development.

### **Fields of Interest**

#### **Subjects**

Children/youth, services

Community/economic development

Environment

Foundations (private operating)

Higher education

### **Geographic Focus**

Ohio

### **Application Information**

Contributes only to pre-selected organizations.

### **Trustees**

Elizabeth Diehl

Matthew A. Diggs, Jr.

Judith Keenan

Joan Townsend

### **Financial Data**

#### **Year ended 11/30/06:**

Assets: \$1,215,959 (market value)

Expenditures: \$80,477

Total giving: \$51,000

Qualifying distributions: \$51,000

Giving activities include:

\$51,000 for grants

### **Additional Location Information**

County: Montgomery

Metropolitan area: Dayton, OH

### **Selected Grants**

The following grants were reported in 2003:

\$100,000 to Parents Advancing Choice in Education (PACE), Dayton, OH. For general support, payable over 1 year.

\$50,000 to Sinclair Community College Foundation, Dayton, OH. For Fast Forward Fund, payable over 1 year.

\$40,000 to Miami Valley School, Dayton, OH. For general support, payable over 1 year.

\$30,000 to Charities Aid Foundation America, Alexandria, VA. For general support, payable over 1 year.

\$11,500 to Paideia School, Atlanta, GA. For general support, payable over 1 year.

\$9,000 to Harley School, Rochester, NY. For general support, payable over 1 year.

\$3,000 to Washington International School, Washington, DC. For general support, payable over 1 year.

\$2,000 to Feminist Womens Health Center, Atlanta, GA. For general support, payable over 1 year.

\$1,000 to Druid Hills United Methodist Church, Atlanta, GA. For general support,



payable over 1 year.

\$1,000 to Park Pride Atlanta, Atlanta, GA. For general support, payable over 1 year.

## **15) Eaton Corporation Contributions Program**

1111 Superior Ave., N.E.

Eaton Ctr.

Cleveland, OH 44114-2584

Telephone: (216) 523-4944

Contact: William B. Doggett, V.P., Public and Community Affairs

Fax: (216) 479-7013

E-mail: [barrydoggett@eaton.com](mailto:barrydoggett@eaton.com)

URL:

[www.eaton.com/EatonCom/OurCompany/AboutUs/CorporateResponsibility/SocialCommitment/index.htm](http://www.eaton.com/EatonCom/OurCompany/AboutUs/CorporateResponsibility/SocialCommitment/index.htm)

**Type of Grantmaker:** Corporate giving program

**Financial Data** (yr. ended 12/31/07): Total giving: \$743,374

**Last Updated:** 5/1/2008

### **Limitations**

Giving on a national and international basis in areas of company operations, including in Brazil, Canada, China, the Dominican Republic, India, Mexico, and Poland.

No support for religious, fraternal, political, or labor organizations.

No grants to individuals, or for endowments, debt reduction, or general operating support.

### **Purpose and Activities**

As a complement to its foundation, Eaton also makes charitable contributions to nonprofit organizations directly. Support is given on a national and international basis.

### **Fields of Interest**

#### **Subjects**

Arts

Community/economic development

Disasters, preparedness/services

Education

Education, drop-out prevention

Elementary/secondary education

Engineering school/education

Family services  
Health care  
Higher education  
Human services  
Public affairs  
Urban/community development  
Vocational education

### **International Interests**

Brazil  
Canada  
China  
Dominican Republic  
India  
Mexico  
Poland

### **Geographic Focus**

National; international

### **Types of Support**

Capital campaigns  
Donated products  
Employee volunteer services  
In-kind gifts  
Matching/challenge support  
Program-related investments/loans

### **Publications**

Application guidelines  
Corporate giving report

### **Application Information**

The Public and Community Affairs Department handles giving. A contributions committee reviews all requests.

Application form not required.

Applicants should submit the following:

1. Results expected from proposed grant
2. Copy of IRS Determination Letter
3. Brief history of organization and description of its mission

4. Copy of most recent annual report/audited financial statement/990
5. How project's results will be evaluated or measured
6. List of company employees involved with the organization
7. Listing of board of directors, trustees, officers and other key people and their affiliations
8. Detailed description of project and amount of funding requested
9. Copy of current year's organizational budget and/or project budget
10. Listing of additional sources and amount of support

Initial approach: Proposal to nearest company facility

Copies of proposal: 1

Board meeting date(s): Bimonthly

Deadline(s): None

Final notification: Following review

### **Corporate Contributions Committee**

William B. Doggett, Vice President, Public and Community Affairs

Alexander M. Cutler, Chairperson and Chief Executive Officer

Craig Arnold

William W. Blausey, Jr.

Susan J. Cook

Ken D. Semelsberger

James E. Sweetnam

### **Number of Staff**

2 part-time professional

1 part-time support

### **Memberships**

#### **Regional Associations of Grantmakers**

Ohio Grantmakers Forum

#### **Affinity Groups**

Association of Corporate Contributions Professionals

#### **Associations and Other Philanthropic Organizations**

Council on Foundations

### **Financial Data**

#### **Year ended 12/31/07:**

Total giving: \$743,374

Giving activities include:

\$726,970 for grants  
\$9,404 for 5 employee matching gifts  
\$7,000 for in-kind gifts

### **Additional Location Information**

County: Cuyahoga  
Metropolitan area: Cleveland-Elyria-Mentor, OH

## **16) Walter and Marian English Foundation**

c/o The Columbus Foundation

1234 E. Broad St.

Columbus, OH 43205-1453

URL: [www.columbusfoundation.org/find/support/english.aspx](http://www.columbusfoundation.org/find/support/english.aspx)

**Type of Grantmaker:** Public charity

**IRS Exemption Status:** 501(c)(3)

**Additional Descriptor:** Supporting organization

**Financial Data** (yr. ended 12/31/06): Assets: \$8,468,624; Total giving: \$401,636

EIN: 311484833

**990:** [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

**Last Updated:** 4/3/2008

### **Background**

Established in 1976 in OH; supporting organization of the Columbus Foundation.

### **Limitations**

Applications not accepted.  
Giving limited to central OH.

### **Purpose and Activities**

The foundation's grantmaking reflects the family's interest in education and science, as well as health and human services.

### **Program Area(s)**

The grantmaker has identified the following area(s) of interest:

#### **Walter & Marian English Awards**

The Walter & Marian English Awards recognize the efforts of United Way agency volunteers, support staff, and professional staff members who excel and are eager to continue to grow both personally and professionally. The awards may be used to attend

professional conferences, workshops, and seminars, and other professional development activities; they may not be used for coursework toward an undergraduate or graduate degree. The awards are paid as grants to the winner's United Way agency. Applications are only distributed to eligible agencies; refer to the Columbus Foundation Website for further details.

### **Fields of Interest**

#### **Subjects**

Community/economic development

Education

Health care

Higher education

Human services

Science

### **Geographic Focus**

Ohio

### **Application Information**

Contributes only to pre-selected organizations.

### **Officers and Trustee**

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

Ellen Julian,\* President

Polly Lassetre,\* Vice President

Floradelle A. Pfahl,\* Secretary

Josiah H. Blackmore,\* Treasurer

Duane M. Campbell

### **Financial Data**

#### **Year ended 12/31/06:**

Revenue: \$660,531

Assets: \$8,468,624 (market value)

Gifts received: \$164,480

Expenditures: \$454,277

Total giving: \$401,636

Program services expenses: \$402,666

Giving activities include:

\$401,636 for grants  
\$1,030 for foundation-administered programs

### **Additional Location Information**

County: Franklin

Metropolitan area: Columbus, OH

## **17) The Fifth Third Foundation**

Fifth Third Ctr., M.D. 1090CA

Cincinnati, OH 45263-0001

Telephone: (513) 534-7001

Contact: Heidi B. Jark, Mgr.

URL:

[www.53.com/wps/portal/av/?New\\_WCM\\_Context=/wps/wcm/connect/FifthThirdSite/About+53/In+the+Community/Fifth+Third+Foundation/](http://www.53.com/wps/portal/av/?New_WCM_Context=/wps/wcm/connect/FifthThirdSite/About+53/In+the+Community/Fifth+Third+Foundation/)

**Type of Grantmaker:** Company-sponsored foundation

**IRS Exemption Status:** 501(c)(3)

**Financial Data** (yr. ended 9/30/06): Assets: \$13,178,856; Total giving: \$4,114,255

EIN: 316024135

**990-PF:** [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

**Last Updated:** 1/18/2008

### **Donor(s)**

Fifth Third Bank

### **Background**

Trust established in 1948 in OH.

### **Limitations**

Giving primarily in areas of company operations in OH, KY, IN, MI, FL, Chicago, IL, St. Louis, MO, and Nashville, TN.

No support for publicly-supported organizations or government agencies; generally, no support for elementary schools.

No grants to individuals (except for employee-related scholarships), or for capital campaigns for individual churches.

### **Purpose and Activities**

The foundation supports organizations involved with arts and culture, education, health, human services, and community development.

### **Program Area(s)**

The grantmaker has identified the following area(s) of interest:

#### **Employee Matching Gifts**

The foundation matches contributions made by full-time employees of Fifth Third to educational institutions on a one-for-one basis from \$25 to \$500 per employee, per institution, per year up to \$1,500 per employee, per year.

#### **Fifth Third Scholarship Program**

The foundation annually awards 17 \$2,500 college scholarships to children of employees of Fifth Third.

### **Fields of Interest**

#### **Subjects**

Arts  
Community/economic development  
Education  
Health care  
Human services

### **Geographic Focus**

Florida  
Illinois  
Indiana  
Kentucky  
Michigan  
Missouri  
Ohio  
Tennessee

### **Types of Support**

Building/renovation  
Capital campaigns  
Continuing support  
Employee-related scholarships  
Equipment

### **Publications**

Application guidelines  
Corporate giving report

### **Application Information**

Visit Web site for nearest company facility. A site visit may be requested. Support is limited to 1 contribution per organization during any given year. Support is limited to 1 contribution per organization during any given three-year period for grants of over \$10,000. Support is limited to 3 years for multi-year grants. Organizations receiving support are asked to provide a final report.

Application form not required.

Applicants should submit the following:

1. Brief history of organization and description of its mission
2. Detailed description of project and amount of funding requested

Initial approach: Letter of inquiry to nearest company facility; contact foundation for major campaign requests

Copies of proposal: 1

Board meeting date(s): Jan., Mar., June, and Sept.

Deadline(s): None

### **Trustee**

Fifth Third Bank

### **Number of Staff**

2 shared staff (shared with Eleanora C. U. Alms Trust, Charles Moerlein Foundation, The Ohio Valley Foundation, Charlotte R. Schmidlapp Fund, Jacob G. Schmidlapp Trust No. 1 and No. 2, Jacob G. Schmidlapp Trust No. 2, Stillson Foundation)

### **Memberships**

#### **Regional Associations of Grantmakers**

Council of Michigan Foundations

Ohio Grantmakers Forum

#### **Associations and Other Philanthropic Organizations**

Council on Foundations

### **Financial Data**

#### **Year ended 9/30/06:**

Assets: \$13,178,856 (market value)

Gifts received: \$2,500,000



Expenditures: \$4,228,803  
Total giving: \$4,114,255  
Qualifying distributions: \$4,142,273  
Giving activities include:  
\$4,114,255 for 537 grants (high: \$325,000; low: \$25)

### **Additional Location Information**

County: Hamilton  
Metropolitan area: Cincinnati-Middletown, OH-KY-IN

### **Selected Grants**

The following grants were reported in 2006:  
\$375,000 to University of Cincinnati Foundation, Cincinnati, OH. For capital support.  
\$325,000 to United Way of Greater Cincinnati, Cincinnati, OH. For annual fund.  
\$200,000 to Cincinnati, City of, Cincinnati, OH. For capital support.  
\$200,000 to Greater Cincinnati Arts and Education Center, Cincinnati, OH. For capital support.  
\$150,000 to Grand Action Foundation, Grand Rapids, MI. For capital support.  
\$50,000 to Akron Community Service Center and Urban League, Akron, OH. For capital support.  
\$28,000 to Elgin Academy, Elgin, IL. For program support.  
\$25,000 to Florida West Coast Symphony, Sarasota, FL. For program support.  
\$25,000 to Ohio CDC Association, Columbus, OH. For program support.  
\$22,000 to United Way of Greater Cincinnati-Northern Kentucky, Florence, KY. For annual fund.

## **18) FirstEnergy Foundation**

(formerly Centerior Energy Foundation)

76 S. Main St.

Akron, OH 44308-1817

Telephone: (330) 761-4246

Contact: Mary Beth Carroll, Pres.

URL: [www.firstenergycorp.com/community](http://www.firstenergycorp.com/community)

**Type of Grantmaker:** Company-sponsored foundation

**IRS Exemption Status:** 501(c)(3)

**Financial Data** (yr. ended 12/31/07): Assets: \$58,337,418; Total giving: \$4,965,962

EIN: 346514181

**990-PF:** [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

**Last Updated:** 4/25/2008

**Donor(s)**

The Cleveland Electric Illuminating Co.  
Centerior Energy Corp.  
FirstEnergy Corp.  
The Toledo Edison Co.  
GPU Service, Inc.  
Metropolitan Edison Co.  
Jersey Central Power & Light Co.  
Ohio Edison Co.  
Pennsylvania Electric Co.

**Background**

Incorporated in 1961 in OH.

**Limitations**

Giving primarily in areas of company operations in NJ, OH, and PA.  
No support for largely tax-supported organizations, fraternal, religious, labor, athletic, social, or veterans' organizations not of direct benefit to the entire community, national or international organizations, United Way-supported organizations, public or private schools, or foundations.  
No grants to individuals, or for political or legislative activities, research, equipment, endowments, or debt reduction; no loans.

**Purpose and Activities**

The foundation supports programs designed to improve the vitality of the community and promote key safety initiatives; promote local and regional economic development and revitalization efforts; advance an educated workforce through professional development, literacy, science, technology, engineering, and mathematics education initiatives; and programs designed to support FirstEnergy employee's community leadership and volunteer interests.

**Program Area(s)**

The grantmaker has identified the following area(s) of interest:

**Employee Matching Gifts**

The foundation matches contributions made by full-time employees of FirstEnergy to institutions of higher education and organizations involved with arts and culture, health, youth, and civic affairs on a one-for-one basis from \$50 to \$3,000 per employee, per year.

## **Fields of Interest**

### **Subjects**

Community/economic development  
Economic development  
Education, reading  
Employment  
Engineering/technology  
Federated giving programs  
Higher education  
Mathematics  
Science, formal/general education

## **Geographic Focus**

New Jersey  
Ohio  
Pennsylvania

## **Types of Support**

Annual campaigns  
Building/renovation  
Capital campaigns  
Curriculum development  
Employee matching gifts  
General/operating support  
Program development

## **Publications**

Application guidelines  
Informational brochure  
Program policy statement

## **Application Information**

Proposals should be no longer than 1 to 2 pages.

Application form not required.

Applicants should submit the following:

1. Copy of IRS Determination Letter
2. Brief history of organization and description of its mission
3. Geographic area to be served

4. How project's results will be evaluated or measured
5. Listing of board of directors, trustees, officers and other key people and their affiliations
6. Detailed description of project and amount of funding requested

Initial approach: Proposal

Board meeting date(s): As needed

Final notification: 12 to 16 weeks

### **Officer and Trustees**

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

Richard Marsh,\* Chairperson

Mary Beth Carroll,\* President

Rhonda Ferguson, Secretary

James F. Pearson, Treasurer

Charles E. Jones

Donald R. Schneider

Leila Vespoli

### **Number of Staff**

2 full-time professional

2 part-time professional

1 full-time support

1 part-time support

### **Memberships**

#### **Regional Associations of Grantmakers**

Council of New Jersey Grantmakers

Ohio Grantmakers Forum

### **Financial Data**

#### **Year ended 12/31/07:**

Assets: \$58,337,418 (market value)

Expenditures: \$5,176,016

Total giving: \$4,965,962

Qualifying distributions: \$4,965,962

Giving activities include:

\$4,832,225 for grants

\$133,737 for employee matching gifts

**Estimated financial data for year ending 12/31/08:**

Assets: \$55,000,000

Grants: \$4,800,000

**Additional Location Information**

County: Summit

Metropolitan area: Akron, OH

**Selected Grants**

The following grants were reported in 2007:

\$241,500 to Recovery Resources, Cleveland, OH, payable over 1 year.

\$241,500 to Recovery Resources, Cleveland, OH, payable over 1 year.

\$188,650 to United Way of Summit County, Akron, OH, payable over 1 year.

\$188,650 to United Way of Summit County, Akron, OH, payable over 1 year.

\$100,000 to Akron Art Museum, Akron, OH, payable over 1 year.

\$100,000 to Kent State University Foundation, Kent, OH, payable over 1 year.

\$50,000 to Akron Community Service Center and Urban League, Akron, OH, payable over 1 year.

\$30,000 to Our City Reading, Reading, PA, payable over 1 year.

\$20,000 to Liberty Science Center, Jersey City, NJ, payable over 1 year.

**19) The George Gund Foundation**

1845 Guildhall Bldg.

45 Prospect Ave. W.

Cleveland, OH 44115-1018

Telephone: (216) 241-3114

Contact: David T. Abbott, Exec. Dir.

Fax: (216) 241-6560

E-mail: [info@gundfdn.org](mailto:info@gundfdn.org)

URL: [www.gundfoundation.org](http://www.gundfoundation.org)

**Type of Grantmaker**

Independent foundation

**IRS Exemption Status:** 501(c)(3)

**Additional Descriptor:** Family foundation

**Financial Data** (yr. ended 12/31/07): Assets: \$513,322,656; Total giving: \$23,411,505

EIN: 346519769

**990-PF:** [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

[E-Grant Reporter](#)

**Last Updated:** 5/9/2008

### **Additional Contact Information**

Fellowship application address: c/o Robert Jaquay, Assoc. Dir., George Gund Foundation, 1845 Guildhall Bldg., 45 Prospect Ave., West Cleveland, Ohio 44115

### **Donor(s)**

*Note: If a donor is deceased, the symbol (‡) follows the name.*

George Gund‡

### **Background**

Incorporated in 1952 in OH.

The George Gund Foundation was established in 1952 as a private, nonprofit institution with the sole purpose of contributing to human well-being and the progress of society. Over the years, program objectives and priorities have been modified to meet the changing opportunities and challenges of our society, but the foundation's basic goal of advancing human welfare remains constant.

### **Limitations**

Giving primarily in northeastern OH and the greater Cleveland, OH, area.

No support for political groups, services for the physically, mentally or developmentally disabled, or the elderly.

Generally, no grants to individuals, or for building or endowment funds, political campaigns, debt reduction, equipment, renovation projects, or to fund benefit events.

No capital grants to projects that have not adopted green building principles.

### **Purpose and Activities**

Priority to education projects, with emphasis on new concepts and methods of teaching and learning, and on increasing educational opportunities for the disadvantaged; programs advancing economic revitalization and job creation; projects promoting neighborhood development; projects for improving human services, employment opportunities, housing for minority and low-income groups; support also for ecology, civic affairs, and the arts. Preference is given to pilot projects and innovative programs which present prospects for broad replication.

### **Program Area(s)**

The grantmaker has identified the following area(s) of interest:

#### **Arts**

The foundation encourages a lively and diverse arts community in greater Cleveland, OH by funding projects that emphasize artistic quality, innovative programming

reaching new audiences, and organizational development. The foundation also tries to balance support for Cleveland's long-standing institutions with funding for newer organizations that promise to reach different audiences and cultures and to expand the city's artistic offerings. The foundation also has an interest in arts in education, with emphasis on curriculum-related partnerships between arts organizations and Cleveland public school children. In addition, the foundation seeks to advance the region's understanding of the importance of the arts by supporting the Community Partnership for Arts and Culture. For more information contact Deena Epstein at E-mail: [depstein@gundfdn.org](mailto:depstein@gundfdn.org).

### **Economic Development and Community Revitalization**

Highest priority is given to initiatives that bolster the impact of foundation-supported intermediary organizations working to improve the competitiveness of Cleveland and its metropolitan region. Examples of such initiatives include quality urban planning and design efforts, improvements to urban parks and other public spaces and promotion of equal opportunity and diversity in housing and the workplace. Also receiving serious consideration are proposals that significantly leverage other resources for redevelopment of Cleveland's downtown and its first-ring suburbs. Proposals of national or statewide significance are also considered, but they must demonstrate a substantial contribution toward the foundation's locally oriented economic development and community revitalization objectives. For more information contact Robert Jaquay at E-mail: [rjaquay@gundfdn.org](mailto:rjaquay@gundfdn.org).

### **Education**

Education is fundamental to success, and the foundation is especially conscious of the vital role of the Cleveland Municipal School District in any successful strategy to advance this region's prospects. Consequently, the foundation's concern for improving primary and secondary education is focused on that school district and, to a lesser degree, on public schools in the first-ring suburbs. The foundation's emphasis is on systemic school improvements, particularly in the areas of management and teacher quality, academic programs that address the needs of disadvantaged children and efforts to better connect schools with their communities. Colleges and universities are playing an ever larger role in the economic and community life of their regions, and the foundation supports efforts of public and private universities in Greater Cleveland to forge these innovative ventures. An additional area of interest is increasing access to higher education for disadvantaged students. Some support is provided to organizations that work to advance educational equity and excellence through state and national policy and to build and strengthen support for public education.

### **Environment**

The foundation makes grants to organizations that work to address environmental issues in Northeast Ohio. In addition, it has an interest in the environment of the state as a whole and in the Lake Erie and Ohio River ecosystems. The foundation focuses on

six substantive areas: 1) Smart Growth and Livable Communities, which promotes alternatives to urban sprawl; 2) Green Buildings and Sustainable Energy, which seeks to advance approaches to reduced energy consumption and waste; 3) Conservation of Natural Systems and Biodiversity, which focuses on conserving intact, high-quality ecosystems and threatened biodiversity; 4) Protection of Human Health, which supports organizations that work to reduce environmental health threats; 5) Public Education and Journalist Training, which provides support for media to increase public awareness of environmental issues; and 6) Leadership Development, which seeks to enhance skills of nonprofit environmental organization leaders. Within these areas, a wide range of proposals will be considered for Northeast Ohio. Statewide emphasis is on policy issues and organizations that assist grassroots groups. Limited support is provided to organizations that work at the national level on federal policies and programs that affect Ohio. For more information contact Jon Jensen at E-mail: [jjensen@gundfdn.org](mailto:jjensen@gundfdn.org).

### **Foundation Fellowship Positions**

The Foundation Fellowship provides an opportunity for promising professionals to work inside the foundation, a philanthropic organization that plays a vital role in supporting the civic life of Greater Cleveland and in various national policy deliberations that impact our community. The fellowship is a two-year, full-time commitment beginning in Summer, requiring residence in Northeast Ohio during the term of engagement. The fellowship experience will be tailored to the foundation's needs and will include a wide range of substantive assignments including reviewing grant proposals, organizing and conducting site visits, and researching topics related to the foundation's grantmaking interests. Each George Gund Foundation Fellow will receive a stipend of \$40,000 per year. A full benefits package during the term of the Fellowship will also be provided by the Foundation. Housing, transportation and other living arrangements are the responsibility of the Fellow. Successful candidates for this fellowship will have a graduate degree and/or several years work experience in the nonprofit sector. Excellent writing skills and sufficient computer competency to carry out assigned projects are essential. A demonstrated desire to work in public service or the nonprofit sector is also important, as the foundation views the fellowship to be a valuable early career opportunity. The selection process is anticipated to be highly competitive. To be considered for the fellowship, each candidate must submit a cover letter, a detailed resume, two letters of recommendation and a short essay discussing why the fellowship opportunity is appealing. Please also indicate how you learned of the position. These materials are due no later than Jan. 3. A Fellow will be selected mid-Apr. Address application materials to Robert Jaquay, Assoc. Dir. at the foundation's office.

### **Human Services**

The foundation believes that heightened focus on developing a more globally



competitive city and region demands direct concurrent attention to the needs of those most at risk of being left out of social and economic transformation. The foundation recognizes this by helping to meet immediate human needs in Greater Cleveland and, especially, by supporting organizations working to alleviate those needs through policy changes locally, in the state of Ohio and at the national level. Areas of particular interest are tax and fiscal policy analysis and building the analytical and advocacy capacity of nonprofit organizations. As a means of investing in the future, the foundation pays special attention to the needs of disadvantaged children through grants to support early childhood care and education, abuse prevention, improved foster care and adoption systems and assessment of the impact of welfare reform. In addition, the foundation provides some support for the local "safety net" of food, clothing, shelter and access to health care. A closely related set of interests is reflected in the foundation's desire to help vulnerable populations achieve access to health insurance, to the legal system, to community support following release from prison and to safe and affordable reproductive health services. For more information contact Marcia Egbert at E-mail: [megbert@gundfdn.org](mailto:megbert@gundfdn.org).

### **Special Projects**

The foundation makes an annual commitment to the Foundation Fighting Blindness for research on the causes, nature and prevention of inherited retinal degenerative diseases. The foundation supports organizations that strengthen the infrastructure of the nonprofit and philanthropic communities through philanthropic services grants.

### **Fields of Interest**

#### **Subjects**

AIDS

AIDS research

Arts

Children/youth, services

Civil rights, race/intergroup relations

Community/economic development

Crime/law enforcement

Education

Education, early childhood education

Education, research

Elementary school/education

Employment

Environment

Environment, natural resources

Government/public administration

Higher education

Housing/shelter, development  
Human services  
Minorities/immigrants, centers/services  
Public affairs  
Secondary school/education  
Urban/community development  
Women, centers/services

**Population Groups**

Economically disadvantaged  
Minorities  
Women

**Geographic Focus**

Ohio

**Types of Support**

Conferences/seminars  
Continuing support  
Emergency funds  
General/operating support  
Internship funds  
Land acquisition  
Matching/challenge support  
Program-related investments/loans  
Program development  
Publication  
Research  
Scholarship funds  
Seed money  
Technical assistance

**Publications**

Annual report (including application guidelines)  
Application guidelines  
Grants list  
Informational brochure (including application guidelines)

**Application Information**

Applicants will find the cover sheet on the foundation web site, or can receive it by mail by contacting the foundation. The foundation accepts organizations using the common

grant application form that has been developed by Ohio Grantmaker Forum. Proposals sent by fax not considered. Please do not submit proposals in notebooks, binders, or plastic folders. Proposals are due the next business day if a deadline falls on a weekend. Application form not required.

Applicants should submit the following:

1. Timetable for implementation and evaluation of project
2. Qualifications of key personnel
3. Copy of IRS Determination Letter
4. Brief history of organization and description of its mission
5. Geographic area to be served
6. Copy of most recent annual report/audited financial statement/990
7. How project's results will be evaluated or measured
8. Descriptive literature about organization
9. Listing of board of directors, trustees, officers and other key people and their affiliations
10. Detailed description of project and amount of funding requested
11. Contact person
12. Copy of current year's organizational budget and/or project budget
13. Listing of additional sources and amount of support

Initial approach: Proposal (including 1-page required cover letter)

Copies of proposal: 1

Board meeting date(s): Mar., June, Sept., and Dec.

Deadline(s): Mar. 15th (for consideration at June meeting), June 15th (for consideration at Sept. meeting), Sept. 15th (for consideration at Dec. meeting) and Dec. 15th (for consideration at Mar. meeting)

Final notification: 8 weeks

### **Officers and Trustees**

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

Geoffrey Gund,\* President and Treasurer

Llura A. Gund,\* Vice President

Ann L. Gund,\* Secretary

David T. Abbott, Executive Director

David Goodman

Catherine Gund

George Gund, III

George Gund, IV

Zachary Gund  
Cathy M. Lewis

**Number of Staff**

8 full-time professional  
5 full-time support

**Memberships**

**Regional Associations of Grantmakers**

Ohio Grantmakers Forum

**Affinity Groups**

Consultative Group on Biodiversity  
Early Childhood Funders' Collaborative  
Environmental Grantmakers Association  
Funders' Network for Smart Growth and Livable Communities  
Funders Concerned About AIDS  
Funders Network on Population, Reproductive Health and Rights  
Grantmakers In Health  
Grantmakers Income Security Taskforce  
Grantmakers In the Arts  
Grantmakers for Children, Youth and Families  
Grantmakers for Education  
Grantmakers for Effective Organizations  
Neighborhood Funders Group  
PRI Makers Network  
Philanthropy for Active Civic Engagement (PACE)  
Sustainable Agriculture and Food Systems Funders  
The Communications Network

**Associations and Other Philanthropic Organizations**

Council on Foundations  
Independent Sector  
Women & Philanthropy

**Financial Data**

**Year ended 12/31/07:**

Assets: \$513,322,656 (market value)  
Expenditures: \$28,705,805  
Total giving: \$23,411,505  
Qualifying distributions: \$26,147,557

Giving activities include:  
\$23,411,505 for grants

### **Additional Location Information**

County: Cuyahoga

Metropolitan area: Cleveland-Elyria-Mentor, OH

### **Selected Grants**

The following grants were reported in 2007:

\$2,285,000 to Foundation Fighting Blindness, Owings Mills, MD. For retinal degenerative diseases research, payable over 1 year.

\$1,200,000 to Detroit-Shoreway Community Development Organization, Cleveland, OH. For Gordon Square Arts District, payable over 3 years.

\$1,000,000 to University Circle, Cleveland, OH. For Euclid Gateway Vision Project, payable over 1 year.

\$500,000 to Cleveland Municipal School District, Cleveland, OH. For start-up support for Office of New School Development and Redesign, payable over 2 years.

\$500,000 to Ideastream, Cleveland, OH. For news and public affairs programming, payable over 2 years.

\$225,000 to Health Policy Institute of Ohio, Columbus, OH. For operating support, payable over 2 years.

\$210,000 to Ohio Environmental Council, Columbus, OH. For operating support, payable over 2 years.

\$100,000 to Public Education Network, Washington, DC. For work on reauthorization of No Child Left Behind Act, payable over 1 year.

\$65,275 to Kent State University Foundation, Kent, OH. For Cleveland Urban Design Collaborative, payable over 1 year.

\$25,000 to Cuyahoga Community College Foundation, Cleveland, OH. For Tri-C JazzFest, payable over 1 year.

## **20) Honda of America Foundation**

c/o Corp. Affairs, Marysville Motorcycle Plant

24000 Honda Pkwy.

Marysville, OH 43040-9251

Telephone: (937) 645-8785

Contact: Lourene Hoy, Exec. Dir.

Fax: (937) 645-8787

E-mail: [rene\\_hoy@ham.honda.com](mailto:rene_hoy@ham.honda.com)

URL: [www.ohio.honda.com/Neighbor/dedication.cfm](http://www.ohio.honda.com/Neighbor/dedication.cfm)

**Type of Grantmaker:** Company-sponsored foundation

**IRS Exemption Status:** 501(c)(3)

**Financial Data** (yr. ended 12/31/06): Assets: \$8,915,292; Total giving: \$552,740

EIN: 311006130

**990-PF:** [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

**Last Updated:** 4/14/2008

### **Donor(s)**

Honda of America Mfg., Inc.

### **Background**

Established in 1981 in OH.

### **Limitations**

Giving primarily in areas of company operations in west central OH, with emphasis on Allen, Auglaize, Champaign, Clark, Darke, Delaware, Franklin, Hardin, Logan, Madison, Marion, Mercer, Miami, Shelby and Union counties.

No support for religious organizations, national health, fraternal, lobbying, political, or veterans' organizations, or sports teams.

No grants to individuals, or for courtesy advertisements, legal advocacy, memberships, conferences, workshops, seminars, pageants, or extracurricular school activities.

### **Purpose and Activities**

The foundation supports organizations involved with arts and culture, education, the environment, health, human services, and community development.

### **Fields of Interest**

#### **Subjects**

Arts

Community/economic development

Education

Environment

Health care

Human services

### **Geographic Focus**

Ohio

## **Publications**

Application guidelines

## **Application Information**

Application form required.

Initial approach: Complete online application form

Copies of proposal: 1

Board meeting date(s): Quarterly

Deadline(s): Based on quarterly meeting dates

Final notification: 1 month

## **Officers and Trustees**

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

Lynn Dennison,\* President

Tom Shoupe, President

Shaun McCloskey,\* Treasurer

John Adams

Sue Boggs

Steve Francis

Larry Jutte

## **Number of Staff**

1 full-time professional

## **Financial Data**

### **Year ended 12/31/06:**

Assets: \$8,915,292 (market value)

Expenditures: \$661,440

Total giving: \$552,740

Qualifying distributions: \$552,740

Giving activities include:

\$552,740 for grants

### **Estimated financial data for year ending 12/31/07:**

Assets: \$9,300,000

Grants: \$560,000

## **Additional Location Information**

County: Union

Metropolitan area: Columbus, OH

### **Selected Grants**

The following grants were reported in 2006:

\$50,000 to Columbus Association for the Performing Arts, Columbus, OH, payable over 1 year.

\$45,000 to Childrens Hospital Foundation, Columbus, OH, payable over 1 year.

\$31,350 to Columbus Japanese Language School, Worthington, OH, payable over 1 year.

\$25,000 to Central State University Foundation, Wilberforce, OH, payable over 1 year.

\$25,000 to Mid-Ohio Board for an Independent Living Environment (MOBILE), Columbus, OH, payable over 1 year.

\$25,000 to Neighborhood House, Columbus, OH, payable over 1 year.

\$25,000 to Springfield Arts Council, Springfield, OH, payable over 1 year.

\$21,600 to Forging Responsible Youth, Springfield, OH, payable over 1 year.

\$15,000 to Ohio Historical Foundation, Columbus, OH, payable over 1 year.

\$15,000 to Wexner Center for the Arts, Columbus, OH, payable over 1 year.

## **21) ICI Paints Corporate Giving Program**

c/o Comms. Dept., Paint Donations

15885 W. Sprague Rd.

Strongsville, OH 44136-1772

Telephone: (440) 297-8743

Contact: Jeff Overman

URL: [www.icipaintsinna.com/NUSNAP/about/CommunityInvolvement.jsp](http://www.icipaintsinna.com/NUSNAP/about/CommunityInvolvement.jsp)

**Type of Grantmaker:** Corporate giving program

**Last Updated:** 11/22/2006

### **Limitations**

Giving primarily in areas of company operations.

No support for United Way agencies or advocacy organizations.

### **Purpose and Activities**

ICI Paints makes charitable contributions of paint to nonprofit organizations involved with community development. Support is given primarily in areas of company operations.

### **Fields of Interest**



**Subjects**

Community/economic development

**Geographic Focus**

Areas of company operations

**Types of Support**

Donated products

**Application Information**

Proposals should be brief.

Application form not required.

Applicants should submit the following:

1. Name, address and phone number of organization
2. Brief history of organization and description of its mission
3. Contact person

Initial approach: Proposal to headquarters

Copies of proposal: 1

Deadline(s): None

**Additional Location Information**

County: Cuyahoga

Metropolitan area: Cleveland-Elyria-Mentor, OH

**22) JPMorgan Chase Bank, N.A. Corporate Giving Program**

(formerly The Chase Manhattan Bank Corporate Social Responsibility Program)

1111 Polaris Pkwy.

Columbus, OH 43240-7001

Telephone: (212) 270-6000

Contact: Steven W. Gelston, V.P.

URL:

[www.jpmorganchase.com/cm/cs?pagename=Chase/Href&urlname=jpmc/community](http://www.jpmorganchase.com/cm/cs?pagename=Chase/Href&urlname=jpmc/community)

**Type of Grantmaker:** Corporate giving program

**Last Updated:** 8/8/2007

**Limitations**

Giving primarily in the CT, NJ, and NY tri-state area, AZ, CA, CO, DE, FL, IL, IN, KY, LA, MI, OH, OK, TX, UT, WV, WI, and on an international basis in areas of company operations; giving also to national organizations and U.S.-based international organizations.

No support for religious, fraternal, or veterans' organizations, or United Way member organizations.

No grants to individuals, or for medical research, fundraising events, debt reduction, deficit financing, capital endowments, scholarships, or tuition; generally no grants for health issues or higher education.

### **Purpose and Activities**

As a complement to its foundation, JPMorgan Chase also makes charitable contributions to nonprofit organizations directly. Special emphasis is directed toward organizations involved with community asset development, community life, and youth education.

### **Program Area(s)**

The grantmaker has identified the following area(s) of interest:

#### **Arts and Culture**

JPMorgan Chase supports programs designed to build arts audiences; promote the creation of new artistic work and encourage emerging artists; and support sustained arts in education programs in public schools.

#### **Community Asset Development**

JPMorgan Chase supports programs designed to promote public policies that effect the well-being of the community by stimulating economic growth and community development; and promote the effective management of nonprofits.

#### **Community Development and Human Services**

JPMorgan Chase supports programs designed to preserve and expand the supply of affordable housing; promote economic development, entrepreneurship, and the creation of entry-level jobs; and provide direct services to those most in need, especially the homeless, the hungry, the unemployed, and youth at risk.

#### **Employee Matching Gifts**

JPMorgan Chase matches contributions made by its employees to nonprofit organizations involved with arts and culture, education, natural resources conservation, health and human services, housing, and economic development on a one-for-one basis.

#### **International Grants**

JPMorgan Chase makes charitable contributions to nonprofit organizations located in approximately 50 countries where the company has a business presence involved with international development and relief. Support is also given to U.S.-based international organizations.

### **Pre-Collegiate Education**

JPMorgan Chase supports programs designed to improve educational opportunity for K-12 students, primarily in public schools.

### **State Committees Program**

Through the State Committees Program, JPMorgan Chase makes charitable contributions to nonprofit organizations located outside the Connecticut, New Jersey, and New York tri-state area involved with arts and culture, education, employment training, human services, and community development. Support is given primarily in Arizona, California, Delaware, Florida, Illinois, Louisiana, Massachusetts, and Ohio.

### **Fields of Interest**

#### **Subjects**

Arts  
Civil rights, race/intergroup relations  
Community/economic development  
Economic development  
Education  
Education, reform  
Elementary/secondary education  
Employment  
Employment, training  
Housing/shelter  
Human services  
Media, film/video  
Nonprofit management  
Performing arts  
Performing arts, dance  
Performing arts, music  
Performing arts, theater  
Public affairs  
Research  
Visual arts

#### **Population Groups**

Economically disadvantaged  
Minorities

#### **Geographic Focus**

National; international

#### **Types of Support**

Continuing support  
Donated equipment  
Employee matching gifts  
Employee volunteer services  
Equipment  
General/operating support  
In-kind gifts  
Program development  
Sponsorships  
Technical assistance

### **Publications**

Application guidelines

### **Application Information**

Visit corporate Web site for details. The company has a staff that only handles contributions. A contributions committee at each company location reviews all requests originating from that particular area.

Application form required.

Initial approach: Complete online eligibility quiz

Copies of proposal: 1

Deadline(s): Various

Final notification: Following review

### **Memberships**

#### **Affinity Groups**

Grantmakers In the Arts

### **Additional Location Information**

County: Delaware

Metropolitan area: Columbus, OH

## **23) Lader Family Foundation**

1750 Euclid Ave.

Cleveland, OH 44115-2106

**Type of Grantmaker:** Public charity

**IRS Exemption Status:** 501(c)(3)

**Additional Descriptor:** Supporting organization

**Financial Data** (yr. ended 6/30/06): Assets: \$1,704,267; Total giving: \$140,575  
EIN: 311566160  
990: [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)  
**Last Updated:** 8/12/2007

### **Background**

Supporting organization of the Jewish Community Federation of Cleveland.

### **Limitations**

Giving primarily in the U.S., with emphasis on the greater Cleveland, OH, area.

### **Fields of Interest**

#### **Subjects**

Arts  
Community/economic development  
Human services  
Jewish agencies & temples  
Jewish federated giving programs

### **Geographic Focus**

Ohio

### **Types of Support**

Annual campaigns  
Capital campaigns  
General/operating support  
Program development

### **Officers and Trustees**

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

Marvin L. Lader,\* President  
Carol Lader,\* Vice President  
Barry Reis, Treasurer  
Morton S. Frankel  
Nancy S. Hyams  
David Lader  
Hedy Milgrom  
Robert S. Reitman  
Edwin Z. Singer

### **Financial Data**

#### **Year ended 6/30/06:**

Revenue: \$48,510

Assets: \$1,704,267 (market value)

Expenditures: \$150,221

Total giving: \$140,575

Program services expenses: \$140,575

Giving activities include:

\$140,575 for grants

### **Additional Location Information**

County: Cuyahoga

Metropolitan area: Cleveland-Elyria-Mentor, OH

## **24) Lancaster Lens, Inc.**

c/o Clarence Clapham

37 W. Broad St., Rm. 530

Columbus, OH 43215-4132

**Type of Grantmaker:** Independent foundation

**IRS Exemption Status:** 501(c)(3)

**Financial Data** (yr. ended 7/31/07): Assets: \$6,756,807; Total giving: \$369,100

EIN: 316023927

**990-PF:** [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

**Last Updated:** 3/28/2008

### **Background**

Established in 1953.

### **Limitations**

Applications not accepted.

Giving primarily in Columbus, OH.

No grants to individuals.

### **Purpose and Activities**

Giving primarily for youth and family services, including an organization for recreational programs for disabled youth; funding also for community organizations.

## **Fields of Interest**

### **Subjects**

Children/youth, services  
Community/economic development  
Family services  
Foundations (private grantmaking)  
Higher education, university

## **Geographic Focus**

Ohio

## **Application Information**

Contributes only to pre-selected organizations.

## **Officers**

Bruce L. Rosa, President  
Clarence Clapham, Secretary

## **Financial Data**

### **Year ended 7/31/07:**

Assets: \$6,756,807 (market value)  
Expenditures: \$391,203  
Total giving: \$369,100  
Qualifying distributions: \$372,566  
Giving activities include:  
\$369,100 for 10 grants (high: \$235,000; low: \$500)

## **Additional Location Information**

County: Franklin  
Metropolitan area: Columbus, OH

## **Selected Grants**

The following grants were reported in 2006:  
\$165,000 to Childrens Hospital Foundation, Columbus, OH, payable over 1 year.  
\$50,000 to Columbus Partnership, Columbus, OH, payable over 1 year.  
\$15,000 to Columbus Coalition Against Family Violence, Columbus, OH, payable over 1 year.  
\$10,000 to Columbus Association for the Performing Arts, Columbus, OH, payable over 1 year.

\$10,000 to Columbus Museum of Art, Columbus, OH, payable over 1 year.  
\$10,000 to Law Enforcement Foundation, Dublin, OH, payable over 1 year.  
\$3,000 to Opera Association of Central Ohio, Columbus, OH, payable over 1 year.

## **25) The Gladys and Ralph Lazarus Foundation**

(formerly Ralph Lazarus Foundation)

c/o Frost, Brown, & Todd

2200 PNC Ctr.

201 E. 5th St.

Cincinnati, OH 45202-4113

**Type of Grantmaker:** Independent foundation

**IRS Exemption Status:** 501(c)(3)

**Financial Data** (yr. ended 6/30/06): Assets: \$2,882,499; Total giving: \$252,000

EIN: 316018922

**990-PF:** [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

**Last Updated:** 9/17/2007

### **Background**

Established in 1994 in OH.

### **Limitations**

Applications not accepted.

Giving on a national basis, with emphasis on CA and TX.

No grants to individuals.

### **Fields of Interest**

#### **Subjects**

Children/youth, services

Community/economic development

Education

Higher education

Libraries (public)

Media, radio

Museums (art)

### **Geographic Focus**

California

Texas



### **Application Information**

Contributes only to pre-selected organizations.

### **Trustees**

Kathryn Lazarus Baron

James Lazarus

John R. Lazarus

### **Financial Data**

#### **Year ended 6/30/06:**

Assets: \$2,882,499 (market value)

Expenditures: \$283,681

Total giving: \$252,000

Qualifying distributions: \$264,164

Giving activities include:

\$252,000 for 22 grants (high: \$62,000; low: \$1,000)

### **Additional Location Information**

County: Hamilton

Metropolitan area: Cincinnati-Middletown, OH-KY-IN

### **Selected Grants**

The following grants were reported in 2006:

\$62,000 to Greater Cincinnati Foundation, Cincinnati, OH, payable over 1 year.

\$20,000 to San Antonio Area Foundation, San Antonio, TX, payable over 1 year.

\$15,000 to Population Connection, Washington, DC, payable over 1 year.

\$15,000 to Taft Museum of Art, Cincinnati, OH, payable over 1 year.

\$10,000 to Texas Public Radio, San Antonio, TX, payable over 1 year.

\$5,000 to Jewish Federation of San Antonio, San Antonio, TX, payable over 1 year.

\$5,000 to Palo Alto Community Fund, Palo Alto, CA, payable over 1 year.

## **26) LexisNexis Corporate Giving Program**

c/o LexisNexis Cares

9443 Springboro Pike

Miamisburg, OH 45342-4425

Telephone: (800) 227-9597

E-mail: [community.relations@lexisnexus.com](mailto:community.relations@lexisnexus.com)

URL: [www.lexisnexis.com/cares](http://www.lexisnexis.com/cares)

**Type of Grantmaker:** Corporate giving program

**Last Updated:** 6/4/2004

### **Additional Contact Information**

Additional tel.: (937) 865-6800

### **Limitations**

Giving primarily in areas of company operations, with emphasis on San Francisco, CA, Colorado Springs, CO, Bethesda, MD, Newark, NJ, New York, NY, Dayton, OH, Provo, UT, Charlottesville, VA, and Seattle, WA.

No support for private foundations, religious organizations, fraternal or veterans' organizations, political parties or candidates, social organizations, or organizations of a controversial nature.

No grants to individuals, or for scholarships, athletics, or capital campaigns, school extracurricular activities, annual campaigns, lobbying activities, debt reduction, or fundraising events.

### **Purpose and Activities**

LexisNexis makes charitable contributions to nonprofit organizations involved with arts and culture, education, and economic development. Support is given primarily in areas of company operations.

### **Program Area(s)**

The grantmaker has identified the following area(s) of interest:

#### **Arts and Culture**

LexisNexis supports programs designed to enhance and sustain excellence in performing and visual arts, with special emphasis on cultural diversity in programming, audiences, and organizations; and promote arts education, with special emphasis on curriculum-related partnerships between arts organizations and Miami Valley, Ohio, public schools.

#### **Economic Development**

LexisNexis supports programs designed to promote local economic development and government affairs initiatives.

#### **Education**

LexisNexis supports programs designed to encourage employee involvement with K-12 education; and help students see the critical link between education and employment.

#### **LexisNexis Shares Matching Contribution Program**

LexisNexis matches contributions made by its employees to nonprofit organizations involved with arts and culture, education, and health and human services on a one-for-

one basis from \$25 to \$250 per employee, per year.

### **Used Equipment Donations**

LexisNexis makes charitable contributions of personal computers and other used equipment to nonprofit organizations involved with arts and culture, education, health and human services, economic development, technology, and government affairs.

### **Fields of Interest**

#### **Subjects**

Arts

Economic development

Education

Education, reading

Elementary/secondary education

### **Geographic Focus**

California

Colorado

Maryland

New Jersey

New York

Ohio

Utah

Virginia

Washington

### **Types of Support**

Donated equipment

Donated products

Employee matching gifts

Employee volunteer services

General/operating support

In-kind gifts

Loaned talent

Matching/challenge support

Sponsorships

### **Publications**

Application guidelines

Informational brochure (including application guidelines)

### **Application Information**

An application forms is required for general operating support, equipment donations, and employee volunteer services. The company may request additional information at a later date. An interview or site visit may be requested. Personal computer donations are limited to 5 per organization. The Community Relations Department handles giving. A contributions committee at each company location reviews all requests originating from that particular area.

Applicants should submit the following:

1. Timetable for implementation and evaluation of project
2. Results expected from proposed grant
3. Statement of problem project will address
4. Population served
5. Copy of IRS Determination Letter
6. How company employees can become involved with the organization
7. Brief history of organization and description of its mission
8. Geographic area to be served
9. Copy of most recent annual report/audited financial statement/990
10. How project's results will be evaluated or measured
11. Listing of board of directors, trustees, officers and other key people and their affiliations
12. Detailed description of project and amount of funding requested
13. Listing of additional sources and amount of support

Initial approach: Download application form for general operating support and equipment donations; complete online application form for employee volunteer services

Deadline(s): None for general operating support

Final notification: 4 to 6 weeks for general operating support

### **Administrators**

Selene Edmunds, Director

Jennifer Monroe, Marketing Specialist

### **Number of Staff**

2 full-time professional

### **Memberships**

## **Regional Associations of Grantmakers**

Ohio Grantmakers Forum

### **Additional Location Information**

County: Montgomery

Metropolitan area: Dayton, OH

## **27) The Lubrizol Corporation Contributions Program**

29400 Lakeland Blvd.

Wickliffe, OH 44092-2201

Contact: Virginia J. Kuchling, Community Rels. Specialist

Fax: (440) 347-1858

E-mail: [gjk@lubrizol.com](mailto:gjk@lubrizol.com)

**Type of Grantmaker:** Corporate giving program

**Financial Data** (yr. ended 12/31/04): Total giving: \$45,000

**Last Updated:** 4/13/2005

### **Limitations**

Giving primarily in areas of company operations, with emphasis on the greater Cleveland and northeast, OH, area.

No support for religious or political organizations.

No grants to individuals, or for capital campaigns or endowments.

### **Purpose and Activities**

As a complement to its foundation, Lubrizol also makes charitable contributions to nonprofit organizations directly. Support is given primarily in areas of company operations.

### **Fields of Interest**

#### **Subjects**

Arts

Community/economic development

Education

Elementary/secondary education

Environment

Health care

Human services

Public affairs  
Youth, services

## **28) M/I Homes Foundation**

(formerly M/I Schottenstein Homes Foundation)

3 Easton Oval, Ste. 500

Columbus, OH 43219-6011

Contact: Robert H. Schottenstein, Pres.

Fax: (614) 418-8030

**Type of Grantmaker:** Company-sponsored foundation

**IRS Exemption Status:** 501(c)(3)

**Financial Data** (yr. ended 12/31/06): Assets: \$5,480,569; Total giving: \$2,169,550

EIN: 311254013

**990-PF:** [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

**Last Updated:** 4/11/2008

### **Donor(s)**

M/I Homes, Inc.

M/I Schottenstein Homes, Inc.

### **Background**

Established in 1989 in OH.

### **Limitations**

Giving primarily in Columbus, OH.

### **Purpose and Activities**

The foundation supports community foundations and organizations involved with arts and culture, education, health, housing, human services, and community development.

### **Fields of Interest**

#### **Subjects**

Arts

Children/youth, services

Community/economic development

Education

Foundations (community)

Health care

Higher education  
Housing/shelter  
Human services  
Law school/education

### **Geographic Focus**

Ohio

### **Types of Support**

Annual campaigns  
Building/renovation  
Capital campaigns  
Endowments  
General/operating support  
Program development  
Scholarship funds

### **Application Information**

Application form not required.  
Initial approach: Proposal  
Copies of proposal: 1  
Board meeting date(s): Monthly  
Deadline(s): None  
Final notification: Varies

### **Officers and Trustees**

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

Robert H. Schottenstein,\* President  
Phillip G. Creek,\* Vice President  
J. Thomas Mason,\* Secretary  
Charlotte Stout, Treasurer

### **Number of Staff**

None

### **Financial Data**

#### **Year ended 12/31/06:**

Assets: \$5,480,569 (market value)  
Gifts received: \$750,000

Expenditures: \$2,175,939  
Total giving: \$2,169,550  
Qualifying distributions: \$2,169,550  
Giving activities include:  
\$2,169,550 for 78 grants (high: \$345,500; low: \$100)  
**Estimated financial data for year ending 12/31/07:**  
Assets: \$4,300,000  
Grants: \$600,000

### **Additional Location Information**

County: Franklin  
Metropolitan area: Columbus, OH

### **Selected Grants**

The following grants were reported in 2007:  
\$200,000 to National Housing Endowment, Washington, DC. For Endowment Fund, payable over 1 year.  
\$200,000 to YWCA, Columbus, OH. For YWCA Family Center for Emergency Housing, payable over 1 year.  
\$150,000 to New Albany Community Foundation, New Albany, OH. For capital campaign for performing arts center, payable over 1 year.  
\$50,000 to Childrens Hospital Center for Child and Family Advocacy, Columbus, OH. For general support, payable over 1 year.  
\$50,000 to Susan G. Komen for the Cure, Columbus, OH. For 2008 Sponsorship, payable over 1 year.  
\$40,000 to Ohio Dominican University, Columbus, OH. For endowment fund, payable over 1 year.  
\$20,000 to Big Brothers Big Sisters of Central Ohio, Columbus, OH. For Camp Oty'Okwa Scholarships, payable over 1 year.  
\$12,440 to Home Building Industry Disaster Relief Fund, Washington, DC. For Disaster Relief Fund, payable over 1 year.  
\$10,000 to Goodwill Industries of Central Ohio, Columbus, OH. For capital campaign, payable over 1 year.  
\$3,500 to American Heart Association, Columbus, OH. For 2007 American Heart Reception, payable over 1 year.

## **29) Manufacturing Advocacy and Growth Network**

(formerly Camp, Inc.)



(also known as MAGNET)

4600 Prospect Ave.

Cleveland, OH 44103-4314

Telephone: (216) 432-5300

Contact: Stephan J. Gage, Ph.D., Pres.

URL: [www.magnetnetwork.org](http://www.magnetnetwork.org)

**Type of Grantmaker:** Public charity

**IRS Exemption Status:** 501(c)(3)

**Additional Descriptor:** Organization that normally receives a substantial part of its support from a governmental unit or from the general public

**Financial Data** (yr. ended 6/30/06): Assets: \$8,655,951

EIN: 341455043

990: [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

**Last Updated:** 8/12/2007

### **Background**

Established in 1985.

### **Limitations**

Giving primarily in OH.

### **Purpose and Activities**

The organization helps manufacturing and emerging technology-based companies excel and grow through understanding, adopting and implementing methods and technologies.

### **Fields of Interest**

#### **Subjects**

Economic development

### **Geographic Focus**

Ohio

### **Officers and Council Members**

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

Stephan J. Gage, Ph.D.,\* President

Fatima L. Weathers, President-Elect and Secretary

Jerry Gifford,\* Treasurer

Robert G. Brown

Timothy D. Dixon  
John W. Harley

**Number of Staff**

75 full-time professional

**Financial Data**

**Year ended 6/30/06:**

Revenue: \$11,356,897

Assets: \$8,655,951 (market value)

Gifts received: \$5,515,395

Expenditures: \$10,762,906

Program services expenses: \$8,454,305

**Additional Location Information**

County: Cuyahoga

Metropolitan area: Cleveland-Elyria-Mentor, OH

**30) Messer Construction Foundation**

5158 Fishwick Dr.

Cincinnati, OH 45216-2216

Contact: Kim Spangler

E-mail: [kspangler@messer.com](mailto:kspangler@messer.com)

URL: [www.messer.com/who\\_we\\_are/corporate\\_citizenship.aspx](http://www.messer.com/who_we_are/corporate_citizenship.aspx)

**Type of Grantmaker:** Company-sponsored foundation

**IRS Exemption Status:** 501(c)(3)

**Financial Data** (yr. ended 9/30/06): Assets: \$45,020; Total giving: \$145,000

EIN: 200262239

**990-PF:** [2007](#) [2006](#) [2005](#) [2004](#) [2003](#)

**Last Updated:** 4/1/2008

**Additional Contact Information**

Additional tel. for Kim Spanger: (513) 242-1541

**Donor(s)**

Messer Construction Co.

## **Background**

Established in 2003 in OH.

## **Limitations**

Giving primarily in areas of company operations in Indianapolis, IN, Knoxville, Lexington, and Louisville, KY, Cincinnati, Columbus, and Dayton, OH, and Nashville, TN.

No grants to individuals.

## **Purpose and Activities**

The foundation supports programs designed to promote economic inclusion, education, and workforce development.

## **Program Area(s)**

The grantmaker has identified the following area(s) of interest:

### **Economic Inclusion**

The foundation supports programs designed to create a more effective workforce; provide practical approaches to supporting diversity; and promote cost-effective methods for economic inclusion.

### **Education**

The foundation supports programs designed to promote elementary and secondary education to prepare students for performance and life-long learning; and higher education to prepare future leaders of construction.

### **Workforce Development**

The foundation supports programs designed to promote training and essential skills necessary for workers to succeed in today's workforce.

## **Fields of Interest**

### **Subjects**

Civil/human rights, equal rights  
Economic development  
Education  
Elementary/secondary education  
Employment  
Employment, training  
Higher education

### **Population Groups**

Economically disadvantaged

## **Geographic Focus**

Indiana

Kentucky

Ohio

Tennessee

## **Types of Support**

Capital campaigns

## **Publications**

Application guidelines

Grants list

Program policy statement

## **Application Information**

Proposals should be no longer than 3 pages. Additional information may be requested at a later date.

Application form required.

Applicants should submit the following:

1. Timetable for implementation and evaluation of project
2. Results expected from proposed grant
3. Statement of problem project will address
4. Copy of IRS Determination Letter
5. Brief history of organization and description of its mission
6. Geographic area to be served
7. Copy of most recent annual report/audited financial statement/990
8. List of company employees involved with the organization
9. Listing of board of directors, trustees, officers and other key people and their affiliations
10. Detailed description of project and amount of funding requested

Initial approach: Download application form and mail proposal and application form to foundation

Copies of proposal: 11

Deadline(s): Postmarked by Mar. 28

Final notification: June 30

## **Officers and Directors**

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

Kathleen C. Daly,\* President

J. Stephen Eden, Secretary

David Miller, Treasurer

### **Financial Data**

#### **Year ended 9/30/06:**

Assets: \$45,020 (market value)

Gifts received: \$175,000

Expenditures: \$147,783

Total giving: \$145,000

Qualifying distributions: \$147,700

Giving activities include:

\$145,000 for 5 grants (high: \$50,000; low: \$20,000)

### **Additional Location Information**

County: Hamilton

Metropolitan area: Cincinnati-Middletown, OH-KY-IN

## **31) Philip R. & Julia P. Myers Family Foundation**

8600 Bridgewater Ln.

Cincinnati, OH 45243-1106

Telephone: (513) 579-2276

Contact: Philip R. Myers, Tr.

**Type of Grantmaker:** Independent foundation

**IRS Exemption Status:** 501(c)(3)

**Financial Data** (yr. ended 12/31/06): Assets: \$1,733,418; Total giving: \$141,168

EIN: 311628971

**990-PF:** [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

**Last Updated:** 1/28/2008

### **Donor(s)**

Philip R. Myers

### **Background**

Established in 1999 in OH.

### **Limitations**

Giving primarily in OH.

### **Fields of Interest**

#### **Subjects**

Arts  
Christian agencies & churches  
Community/economic development  
Human services  
Museums (specialized)

### **Geographic Focus**

Ohio

### **Application Information**

Applicants should submit the following:

1. Copy of IRS Determination Letter
2. Detailed description of project and amount of funding requested

Initial approach: Letter

Deadline(s): None

### **Trustees**

Julia P. Myers  
Philip R. Myers

### **Financial Data**

#### **Year ended 12/31/06:**

Assets: \$1,733,418 (market value)  
Expenditures: \$146,234  
Total giving: \$141,168  
Qualifying distributions: \$141,268  
Giving activities include:  
\$141,168 for 54 grants (high: \$25,000; low: \$50)

### **Additional Location Information**

County: Hamilton  
Metropolitan area: Cincinnati-Middletown, OH-KY-IN

### **Selected Grants**

The following grants were reported in 2005:  
\$14,000 to United Way, payable over 1 year.  
\$1,000 to Humane Society, payable over 1 year.  
\$200 to Boy Scouts of America, payable over 1 year.

## **32) The Mylander Foundation**

c/o Citizens Bank

100 E. Water St.

Sandusky, OH 44870-2524

**Type of Grantmaker:** Independent foundation

**IRS Exemption Status:** 501(c)(3)

**Financial Data** (yr. ended 12/31/06): Assets: \$2,534,858; Total giving: \$104,000

EIN: 341945747

**990-PF:** [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

**Last Updated:** 7/22/2007

### **Additional Contact Information**

Application address: c/o George M. Muelhauser, III, 165 E. Washington Row, Sandusky, OH 44870-2610, tel.: (419) 625-8324

### **Background**

Established in 2001 in OH.

### **Limitations**

Giving primarily in OH.

No grants to individuals.

### **Fields of Interest**

#### **Subjects**

Community/economic development

Education

Federated giving programs

Health care

Human services

Performing arts

Protestant agencies & churches

### **Geographic Focus**

Ohio

### **Types of Support**

Equipment

Program development

### **Application Information**

Application form not required.

Deadline(s): None

### **Trustee**

Citizens Bank

### **Financial Data**

#### **Year ended 12/31/06:**

Assets: \$2,534,858 (market value)

Gifts received: \$18,083

Expenditures: \$127,548

Total giving: \$104,000

Qualifying distributions: \$111,132

Giving activities include:

\$104,000 for grants

### **Additional Location Information**

County: Erie

Metropolitan area: Sandusky, OH

## **33) National City Corporation Contributions Program**

National City Ctr.

1900 E. 9th St., LOC-2157

Cleveland, OH 44114-3484

Telephone: (216) 222-2000

Contact: Bruce A. McCrodden, Sr. V.P., Corp. Public Affairs

URL: [www.nationalcity.com/about/commurelations/default.asp](http://www.nationalcity.com/about/commurelations/default.asp)

**Type of Grantmaker:** Corporate giving program

**Financial Data** (yr. ended 12/31/06): Total giving: \$4,100,000



**Last Updated:** 4/19/2007

**Limitations**

Giving primarily in areas of company operations in FL, IL, IN, KY, MI, MO, OH, and western PA; giving also to regional and national organizations.

**Purpose and Activities**

As a complement to its foundation, National City also makes charitable contributions to nonprofit organizations directly. Support is given primarily in areas of company operations.

**Fields of Interest**

**Subjects**

- Arts
- Community/economic development
- Economic development
- Education
- Employment
- Health care
- Health organizations
- Higher education
- Museums
- Public affairs
- Urban/community development

**Population Groups**

- Disabilities, people with
- Minorities
- Women

**Geographic Focus**

- Florida
- Illinois
- Indiana
- Kentucky
- Michigan
- Missouri
- Ohio
- Pennsylvania

**Types of Support**

Annual campaigns  
Building/renovation  
Capital campaigns  
Donated equipment  
Employee volunteer services  
Loaned talent

### **Publications**

Application guidelines  
Corporate giving report  
Program policy statement

### **Application Information**

The Public Affairs Department handles giving. The company has a staff that only handles contributions. A contributions committee reviews all requests.

Application form not required.

Applicants should submit the following:

1. Statement of problem project will address
2. Copy of IRS Determination Letter
3. Brief history of organization and description of its mission
4. Descriptive literature about organization
5. Listing of board of directors, trustees, officers and other key people and their affiliations
6. Detailed description of project and amount of funding requested
7. Copy of current year's organizational budget and/or project budget
8. Additional materials/documentation

Initial approach: Proposal to nearest company facility

Copies of proposal: 1

Board meeting date(s): Quarterly

Deadline(s): None

Final notification: Following review

### **Number of Staff**

2 full-time professional

2 full-time support

### **Memberships**

**Regional Associations of Grantmakers**  
Council of Michigan Foundations

**Financial Data**

**Year ended 12/31/06:**

Total giving: \$4,100,000

Giving activities include:

\$4,100,000 for grants

**Additional Location Information**

County: Cuyahoga

Metropolitan area: Cleveland-Elyria-Mentor, OH

**34) Nationwide Mutual Insurance Company Contributions**

**Program**

(formerly Nationwide Insurance Enterprise Corporate Giving Program)

1 Nationwide Plz., M.C. 3-04-104

Columbus, OH 43215-2239

Telephone: (614) 249-4310

Contact: Karen Blickley, Dir., Nationwide Fdn.

Fax: (614) 249-8897

E-mail: [corpcit@nationwide.com](mailto:corpcit@nationwide.com)

URL: [www.nationwide.com/nw/about-us/community-involvement/index.htm?WT.svl=2](http://www.nationwide.com/nw/about-us/community-involvement/index.htm?WT.svl=2)

**Type of Grantmaker:** Corporate giving program

**Financial Data** (yr. ended 12/31/07): Total giving: \$3,476,098

**Last Updated:** 4/29/2008

**Limitations**

Giving on a national basis in areas of company operations, with emphasis on central OH.

**Purpose and Activities**

As a complement to its foundation, Nationwide also makes charitable contributions to nonprofit organizations directly. Support is given on a national basis in areas of company operations.

**Fields of Interest**

## **Subjects**

Arts  
Community/economic development  
Health care  
Human services  
Public affairs

## **Geographic Focus**

Ohio

## **Types of Support**

General/operating support  
In-kind gifts  
Sponsorships  
Use of facilities

## **Publications**

Application guidelines

## **Application Information**

The Corporate Citizenship Department handles giving. The company has a staff that only handles contributions. A contributions committee reviews all requests.

Application form required.

Initial approach: Contact nearest company facility for application form

Copies of proposal: 1

Deadline(s): Sept. 1

Final notification: Following review

## **Number of Staff**

3 full-time professional

## **Financial Data**

### **Year ended 12/31/07:**

Total giving: \$3,476,098

Giving activities include:

\$3,455,053 for 184 grants (high: \$352,244; low: \$23)

\$21,044 for 57 in-kind gifts

## **Additional Location Information**

County: Franklin  
Metropolitan area: Columbus, OH

### **35) NCC Charitable Foundation**

(formerly NCC Charitable Foundation II)

c/o National City Bank

1900 E. 9th St., LOC 2157

Cleveland, OH 44114-3404

Telephone: (216) 222-2995

Contact: Joanne Clark, V.P.

E-mail: [joanne.clark@nationalcity.com](mailto:joanne.clark@nationalcity.com)

URL: [www.nationalcity.com/about/commurelations/default.asp](http://www.nationalcity.com/about/commurelations/default.asp)

**Type of Grantmaker:** Company-sponsored foundation

**IRS Exemption Status:** 501(c)(3)

**Financial Data** (yr. ended 6/30/06): Assets: \$70,359,085; Total giving: \$24,868,048

EIN: 347050989

**990-PF:** [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

**Last Updated:** 10/3/2007

#### **Additional Contact Information**

Additional e-mail: [bruce.mccrodden@nationalcity.com](mailto:bruce.mccrodden@nationalcity.com)

#### **Donor(s)**

National City Bank of Kentucky

National City Corp.

#### **Background**

Established in 1993.

#### **Limitations**

Giving primarily in FL, IL, IN, KY, MI, MO, OH, and PA, with emphasis on OH.

No grants to individuals.

#### **Purpose and Activities**

The foundation supports organizations involved with arts and culture, education, health, human services, and community development.

#### **Program Area(s)**

The grantmaker has identified the following area(s) of interest:

**Employee Matching Gifts**

The foundation matches contributions made by employees of National City to educational institutions.

**Fields of Interest**

**Subjects**

- Arts
- Community/economic development
- Education
- Federated giving programs
- Health care
- Human services

**Geographic Focus**

- Florida
- Illinois
- Indiana
- Kentucky
- Michigan
- Missouri
- Ohio
- Pennsylvania

**Types of Support**

- Annual campaigns
- Capital campaigns
- Continuing support
- Employee matching gifts
- General/operating support
- Program development
- Scholarship funds
- Sponsorships

**Publications**

- Corporate giving report
- Corporate giving report (including application guidelines)

**Application Information**

Application form not required.

Applicants should submit the following:

1. Copy of IRS Determination Letter
2. Brief history of organization and description of its mission
3. Listing of board of directors, trustees, officers and other key people and their affiliations
4. Detailed description of project and amount of funding requested
5. Copy of current year's organizational budget and/or project budget

Initial approach: Proposal

Copies of proposal: 1

Board meeting date(s): Quarterly

Deadline(s): None

Final notification: Varies

### **Officers**

Joanne Clark, Sr. Vice President

David A. Daberko, Officer

Bruce McCrodden, Officer

Shelley J. Seifert, Officer

### **Trustee**

NCC Charitable Foundation

### **Number of Staff**

2 full-time professional

2 full-time support

### **Financial Data**

#### **Year ended 6/30/06:**

Assets: \$70,359,085 (market value)

Gifts received: \$24,178,507

Expenditures: \$25,532,147

Total giving: \$24,868,048

Qualifying distributions: \$24,868,248

Giving activities include:

\$24,868,048 for 3,367 grants (high: \$440,000)

### **Additional Location Information**

County: Cuyahoga

Metropolitan area: Cleveland-Elyria-Mentor, OH

### **Selected Grants**

The following grants were reported in 2006:

\$440,000 to Western Michigan University, Kalamazoo, MI. For general support.

\$400,000 to American Red Cross, Greater Cleveland Chapter, Cleveland, OH. For general support.

\$300,000 to United Way, Metro, Louisville, KY. For general support.

\$250,000 to Cleveland Museum of Art, Cleveland, OH. For general support.

\$150,000 to Local Initiatives Support Corporation (LISC), Cleveland, OH. For general support.

\$25,000 to Ohio Grantmakers Forum, Columbus, OH. For general support.

\$20,000 to Columbus Association for the Performing Arts, Columbus, OH. For general support.

\$17,500 to New Detroit, Detroit, MI. For general support.

\$16,500 to Ohio Evans Scholarship, Cincinnati, OH. For general support.

\$15,000 to Starfire Council of Greater Cincinnati, Cincinnati, OH. For general support.

## **36) Ohio Community Development Finance Fund**

17 S. High St., Ste. 900

Columbus, OH 43215-3441

Telephone: (614) 221-1114

Fax: (614) 221-7493

E-mail: [info@financefund.org](mailto:info@financefund.org)

URL: [www.financefund.org](http://www.financefund.org)

**Type of Grantmaker:** Public charity

**IRS Exemption Status:** 501(c)(3)

**Additional Descriptor:** Organization that normally receives a substantial part of its support from a governmental unit or from the general public

**Financial Data** (yr. ended 12/31/06): Assets: \$31,390,617; Total giving: \$1,717,454

EIN: 311229532

**990:** [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

**Last Updated:** 3/5/2008

### **Background**

Established in 1987 in OH.



### **Limitations**

Giving primarily in OH.

### **Purpose and Activities**

The fund works to enable progress and inspire change within Ohio's low-income communities. It connects local community development organizations and small businesses with needed funding in the form of grants, loans and nontraditional financial products.

### **Fields of Interest**

#### **Subjects**

Community/economic development

#### **Population Groups**

Economically disadvantaged

### **Geographic Focus**

Ohio

### **Publications**

Annual report

### **Officers and Directors**

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

Jayhue Murdock,\* Chairperson

Ken Kempton,\* Vice-Chairperson

Randy Runyon,\* Secretary

Greg Kiger,\* Treasurer

Catherine Cawthon,\* Chairperson Emeritus

Patricia Barnes

Mary Burke

Hugh Grefe

### **Financial Data**

#### **Year ended 12/31/06:**

Revenue: \$4,904,358

Assets: \$31,390,617 (market value)

Gifts received: \$2,833,775

Expenditures: \$3,777,342

Total giving: \$1,717,454  
Program services expenses: \$3,227,493  
Giving activities include:  
\$1,717,454 for grants  
\$1,510,039 for foundation-administered programs

### **Additional Location Information**

County: Franklin  
Metropolitan area: Columbus, OH

## **37) Ohio Farm Bureau Foundation**

280 N. High St.  
P.O. Box 182383  
Columbus, OH 43218-2383  
Telephone: (614) 246-8904  
E-mail: [foundation@ofbf.org](mailto:foundation@ofbf.org)  
URL: [ofbf.org/](http://ofbf.org/)  
**Type of Grantmaker:** Public charity  
**IRS Exemption Status:** 501(c)(3)  
**Financial Data** (yr. ended 12/31/06): Assets: \$603,490  
EIN: 311781473  
**990:** [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)  
**Last Updated:** 1/22/2008

### **Background**

Established in 1985.

### **Purpose and Activities**

The foundation strives for measurable community improvement through its support of special projects that focus on agricultural education, environmental and economic issues.

### **Program Area(s)**

The grantmaker has identified the following area(s) of interest:

#### **Darwin Bryan Scholarship Program**

The scholarship fund assists students who have been active in the Farm Bureau youth program and/or whose parents are Farm Bureau members.

#### **Grant Program**

The program seeks to support community service groups in rural, suburban and/or urban settings, independent producers and/or agricultural producer groups. Groups do not have to have nonprofit status from the IRS, but should be sponsored/supported by and/or work in conjunction with such a nonprofit entity. The applicant should be interested in a competitively awarded grant to initiate, continue and/or complete a program highlighting agriculture and its impact on the community in one of the following focus areas: economics, community development and/or agribusiness development; education, public awareness and/or community outreach; and environmental issues involving agriculture and its impact on the respective community. Grant awards range from a minimum of \$1,000 to a maximum of \$2,500. Matching funds and/or resources are required.

### **Women's Leadership in Agriculture Scholarship Program**

Provides grants for female education, recreation and service.

### **Fields of Interest**

#### **Subjects**

Agriculture

Agriculture/food, public education

Community/economic development

Environment

### **Publications**

Annual report

### **Application Information**

Application form required.

### **Officers and Trustees**

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

John C. Fisher,\* President

Bob Vance,\* Vice President and Secretary

Brent Porteus,\* Treasurer

Todd Beckwith

Norman Fausey

Doug Graham

Diane Radigan

### **Financial Data**

**Year ended 12/31/06:**

Revenue: \$119,600  
Assets: \$603,490 (market value)  
Gifts received: \$38,620  
Expenditures: \$28,520  
Program services expenses: \$19,780

### **Additional Location Information**

County: Franklin  
Metropolitan area: Columbus, OH

## **38) The Procter & Gamble Fund**

2 Procter & Gamble Pl.  
Cincinnati, OH 45202-3315  
Telephone: (513) 983-2139  
Contact: Tawnia True  
Fax: (513) 983-2147  
E-mail: [pgfund.im@pg.com](mailto:pgfund.im@pg.com)  
URL: [www.pg.com/company/our\\_commitment/community.jhtml](http://www.pg.com/company/our_commitment/community.jhtml)

**Type of Grantmaker:** Company-sponsored foundation

**IRS Exemption Status:** 501(c)(3)

**Financial Data** (yr. ended 6/30/06): Assets: \$44,263,781; Total giving: \$25,009,145

EIN: 316019594

**990-PF:** [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

**Last Updated:** 9/28/2007

### **Donor(s)**

The Procter & Gamble Co.

### **Background**

Incorporated in 1952 in OH.

### **Limitations**

Giving on a national and international basis in areas of company operations, with emphasis on OH.

No support for religious organizations, political, legislative, or fraternal organizations, or athletic, social, or veterans' organizations.

No grants to individuals (except for employee-related scholarships) or for endowments; generally, no fundraisers.

### **Purpose and Activities**

The fund supports food banks and community foundations and organizations involved with arts and culture, education, clean water, health, disaster relief, youth development, human services, international relief, community development, and economically disadvantaged people. Special emphasis is directed toward children in need.

### **Program Area(s)**

The grantmaker has identified the following area(s) of interest:

#### **Employee Matching Gifts**

The fund matches contributions made by employees and directors of Procter & Gamble to institutions of higher education on a two-for-one basis from \$25 to \$10,000 per contributor, per year.

#### **Employee-Related Scholarships**

The fund awards college scholarships to children of employees and retirees of Procter & Gamble and its U.S. subsidiaries.

#### **Live, Learn, and Thrive**

The fund supports programs designed to benefit children in need, from birth to age 13. The program is designed to help children live by ensuring a healthy start; provide children with places, tools and programs that enhance their ability to learn; and give children access to programs that help develop the self-esteem and life skills they need to thrive. Special emphasis is directed toward education; clean water; health; and hygiene.

### **Fields of Interest**

#### **Subjects**

Arts  
Boys & girls clubs  
Community/economic development  
Disasters, preparedness/services  
Education  
Education, fund raising/fund distribution  
Environment, water pollution  
Federated giving programs  
Food banks  
Foundations (community)  
Health care  
Higher education  
Historic preservation/historical societies  
Human services  
International relief

Museums  
Performing arts  
Youth development

**Population Groups**

Children  
Economically disadvantaged

**Geographic Focus**

National; international

**Types of Support**

Employee-related scholarships  
Employee matching gifts  
General/operating support

**Publications**

Application guidelines

**Application Information**

Application form required.  
Initial approach: Complete online application  
Deadline(s): July 1 to Sept 30; Dec. 1 to Feb. 29

**Officers and Trustees**

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

C.R. Otto,\* President  
Paula S. Long, Vice President and Secretary  
R.L. Antoine,\* Vice President  
Clayton C. Daley, Jr.,\* Vice President  
John P. Goodwin, Treasurer

**Memberships**

**Regional Associations of Grantmakers**

Ohio Grantmakers Forum

**Financial Data**

**Year ended 6/30/06:**

Assets: \$44,263,781 (market value)  
Gifts received: \$15,000,000

Expenditures: \$25,335,858  
Total giving: \$25,009,145  
Qualifying distributions: \$25,062,812  
Giving activities include:  
\$25,009,145 for 1,256 grants (high: \$1,000,000; low: \$50)

### **Additional Location Information**

County: Hamilton  
Metropolitan area: Cincinnati-Middletown, OH-KY-IN

### **Selected Grants**

The following grants were reported in 2006:  
\$1,000,000 to National Underground Railroad Freedom Center, Cincinnati, OH, payable over 1 year.  
\$1,000,000 to Population Services International, Washington, DC, payable over 1 year.  
\$779,000 to United Way and Community Chest, payable over 1 year.  
\$779,000 to United Way and Community Chest, payable over 1 year.  
\$500,000 to Claremont Graduate University, Claremont, CA, payable over 1 year.  
\$200,000 to Ohio State University, Columbus, OH, payable over 1 year.  
\$50,000 to Population Services International, Washington, DC, payable over 1 year.  
\$21,500 to United Way of Wyoming Valley, Wilkes Barre, PA, payable over 1 year.  
\$20,000 to Flint RiverCenter Partners, Albany, GA, payable over 1 year.  
\$3,420 to Saint Olaf College, Northfield, MN, payable over 1 year.

## **39) Louis & Melba Schott Foundation**

c/o Fifth Third Bank  
38 Fountain Sq. Plz.  
Cincinnati, OH 45263-0858  
**Type of Grantmaker:** Independent foundation  
**IRS Exemption Status:** 501(c)(3)  
**Financial Data** (yr. ended 9/30/07): Assets: \$1,970,797; Total giving: \$70,000  
EIN: 202102454  
**990-PF:** [2007](#) [2006](#) [2005](#)  
**Last Updated:** 3/18/2008

### **Background**

Established in 2005 in OH.

### **Limitations**

Giving primarily in OH.  
No grants to individuals.

### **Fields of Interest**

#### **Subjects**

Arts  
Community/economic development  
Human services

### **Geographic Focus**

Ohio

### **Application Information**

Initial approach: Letter  
Deadline(s): Varies

### **Advisor**

Elizabeth W. LaPlante

### **Trustee**

Fifth Third Bank

### **Financial Data**

#### **Year ended 9/30/07:**

Assets: \$1,970,797 (market value)  
Expenditures: \$97,588  
Total giving: \$70,000  
Qualifying distributions: \$72,739  
Giving activities include:  
\$70,000 for 5 grants (high: \$25,000; low: \$10,000)

### **Additional Location Information**

County: Hamilton  
Metropolitan area: Cincinnati-Middletown, OH-KY-IN



## **40) The Scott & Fetzer Foundation**

c/o The Scott Fetzer Co.

28800 Clemens Rd.

Westlake, OH 44145-1134

Telephone: (440) 892-3000

Contact: Edie DeSantis

**Type of Grantmaker:** Company-sponsored foundation

**IRS Exemption Status:** 501(c)(3)

**Financial Data** (yr. ended 12/31/06): Assets: \$396,278; Total giving: \$192,508

EIN: 346596076

**990-PF:** [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

**Last Updated:** 4/10/2008

### **Donor(s)**

The Scott Fetzer Co.

### **Background**

Established in 1967 in OH.

### **Limitations**

Giving primarily in OH, with emphasis on Cleveland.

No grants to individuals.

### **Purpose and Activities**

The foundation supports organizations involved with education, health, cancer, human services, and community economic development.

### **Fields of Interest**

#### **Subjects**

Cancer

Community/economic development

Education

Federated giving programs

Health care

Higher education

Human services

Libraries (public)

Secondary school/education

Youth development, business

## **Geographic Focus**

Ohio

## **Types of Support**

General/operating support

## **Application Information**

Application form not required.

Applicants should submit the following:

1. Copy of IRS Determination Letter

Initial approach: Proposal

Deadline(s): None

## **Officers**

Kenneth J. Semelsberger, President

Patricia M. Scanlon, Vice President and Secretary

William W.T. Stephans, Vice President and Treasurer

## **Financial Data**

### **Year ended 12/31/06:**

Assets: \$396,278 (market value)

Gifts received: \$188,500

Expenditures: \$192,912

Total giving: \$192,508

Qualifying distributions: \$192,508

Giving activities include:

\$192,508 for 77 grants (high: \$19,000; low: \$25)

## **Additional Location Information**

County: Cuyahoga

Metropolitan area: Cleveland-Elyria-Mentor, OH

## **Selected Grants**

The following grants were reported in 2006:

\$19,000 to Direct Selling Education Foundation, Washington, DC, payable over 1 year.

\$16,250 to United Way of Greater Cleveland, Cleveland, OH, payable over 1 year.

\$16,250 to United Way of Greater Cleveland, Cleveland, OH, payable over 1 year.

\$16,250 to United Way of Greater Cleveland, Cleveland, OH, payable over 1 year.  
\$16,250 to United Way of Greater Cleveland, Cleveland, OH, payable over 1 year.  
\$10,000 to American Library Association, Chicago, IL, payable over 1 year.  
\$8,500 to Southwest Community Health Foundation, Middleburg Heights, OH, payable over 1 year.  
\$8,500 to Southwest Community Health Foundation, Middleburg Heights, OH, payable over 1 year.  
\$8,500 to Southwest Community Health Foundation, Middleburg Heights, OH, payable over 1 year.  
\$250 to University of Wisconsin Foundation, Madison, WI, payable over 1 year.

### **41) The Sherwin-Williams Foundation**

101 Prospect Ave., N.W., 12th Fl.

Cleveland, OH 44115-1093

Telephone: (216) 566-2000

Contact: Barbara Gadosik, Dir., Corp. Contribs.

**Type of Grantmaker:** Company-sponsored foundation

**IRS Exemption Status:** 501(c)(3)

**Financial Data** (yr. ended 12/31/06): Assets: \$17,800,974; Total giving: \$919,101

EIN: 346555476

**990-PF:** [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

**Last Updated:** 1/3/2008

#### **Donor(s)**

The Sherwin-Williams Co.

#### **Background**

Incorporated in 1964 in OH.

#### **Limitations**

Giving primarily in areas of company operations, with emphasis on Cleveland, OH. No support for sectarian, labor, veterans', or fraternal organizations or tax-supported organizations.

No grants to individuals, or for endowments, start-up needs, emergency needs, debt reduction, land acquisition, special projects, research, scholarships, fellowships, publications, advertising, or conferences; no loans.

#### **Purpose and Activities**

The foundation supports organizations involved with arts and culture, education, health, disaster relief, human services, and community development.

### **Fields of Interest**

#### **Subjects**

Arts  
Community/economic development  
Disasters, preparedness/services  
Economic development  
Education  
Federated giving programs  
Health care  
Higher education  
Human services

### **Geographic Focus**

Ohio

### **Types of Support**

Capital campaigns  
Employee matching gifts  
General/operating support  
Program development

### **Application Information**

Application form not required.

Applicants should submit the following:

1. Timetable for implementation and evaluation of project
2. Copy of IRS Determination Letter
3. Brief history of organization and description of its mission
4. Copy of most recent annual report/audited financial statement/990
5. Listing of board of directors, trustees, officers and other key people and their affiliations
6. Detailed description of project and amount of funding requested
7. Copy of current year's organizational budget and/or project budget
8. Listing of additional sources and amount of support
9. Statement of problem project will address

Initial approach: Proposal  
Copies of proposal: 1  
Board meeting date(s): Mar., June, Sept., and Dec.  
Deadline(s): Jan., Apr., July, or Oct. is preferred  
Final notification: 1 month

### **Officers and Trustees**

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

C.M. Connor,\* President  
S.P. Hennessy,\* Secretary-Treasurer  
T.E. Hopkins

### **Memberships**

#### **Regional Associations of Grantmakers**

Ohio Grantmakers Forum

### **Financial Data**

#### **Year ended 12/31/06:**

Assets: \$17,800,974 (market value)  
Gifts received: \$1,030,211  
Expenditures: \$939,502  
Total giving: \$919,101  
Qualifying distributions: \$919,101  
Giving activities include:  
\$689,874 for 81 grants (high: \$187,000; low: \$250)  
\$229,227 for employee matching gifts

### **Additional Location Information**

County: Cuyahoga  
Metropolitan area: Cleveland-Elyria-Mentor, OH

### **Selected Grants**

The following grants were reported in 2006:  
\$187,000 to United Way of Greater Cleveland, Cleveland, OH, payable over 1 year.  
\$80,000 to John Carroll University, University Heights, OH, payable over 1 year.  
\$70,500 to Economic Growth Foundation, Cleveland, OH, payable over 1 year.  
\$25,000 to Huntingburg Foundation, Huntingburg, IN, payable over 1 year.  
\$25,000 to Students in Free Enterprise, Springfield, MO, payable over 1 year.  
\$20,000 to Cleveland Scholarship Programs, Cleveland, OH, payable over 1 year.

\$18,000 to Musical Arts Association, Cleveland, OH, payable over 1 year.  
\$7,500 to Ohio Foundation of Independent Colleges, Columbus, OH, payable over 1 year.  
\$5,000 to Cleveland Museum of Art, Cleveland, OH, payable over 1 year.  
\$3,030 to United Way of the Bluegrass, Lexington, KY, payable over 1 year.

## **42) Sky Foundation**

221 S. Church St.

Bowling Green, OH 43402-0428

Telephone: (419) 327-6300

Contact: Angie Hill, Asst. Secy. and Admin.

**Type of Grantmaker:** Company-sponsored foundation

**IRS Exemption Status:** 501(c)(3)

**Financial Data** (yr. ended 12/31/06): Assets: \$1,379,658; Total giving: \$599,984

EIN: 341886344

**990-PF:** [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

**Last Updated:** 8/13/2007

### **Donor(s)**

Sky Financial Group, Inc.

Sky Holdings, Inc.

### **Background**

Established in 1998 in OH.

### **Limitations**

Giving limited to northeast IN, southern MI, OH, western PA, and northern WV.

No support for private foundations.

No grants to individuals.

### **Purpose and Activities**

The foundation supports organizations involved with arts and culture, education, health, human services, and community development.

### **Fields of Interest**

#### **Subjects**

Arts

Community/economic development

Education  
Elementary/secondary education  
Health care  
Higher education  
Human services  
Libraries (public)  
Performing arts, orchestras  
YM/YWCAs & YM/YWHAs

### **Geographic Focus**

Indiana  
Michigan  
Ohio  
Pennsylvania  
West Virginia

### **Application Information**

Application form required.  
Applicants should submit the following:

1. Copy of IRS Determination Letter

Initial approach: Contact foundation for application form  
Deadline(s): None

### **Trustees**

Marty E. Adams  
Jennifer L. Iliff  
Darlene Minnick  
Rockette "Rocky" Richardson  
Curtis E. Shepherd  
C.J. Keller Smith  
Eric C. Stachler  
Kevin T. Thompson  
Paul Tomko  
D.J. Valentine

### **Financial Data**

**Year ended 12/31/06:**

Assets: \$1,379,658 (market value)

Gifts received: \$63  
Expenditures: \$619,148  
Total giving: \$599,984  
Qualifying distributions: \$599,984  
Giving activities include:  
\$599,984 for grants

### **Additional Location Information**

County: Wood  
Metropolitan area: Toledo, OH

### **Selected Grants**

The following grants were reported in 2006:  
\$50,000 to Bowling Green State University, Bowling Green, OH, payable over 1 year.  
\$22,500 to Cleveland Foundation, Cleveland, OH, payable over 1 year.  
\$22,500 to Habitat for Humanity, payable over 1 year.  
\$15,000 to Shoes for Kids, Cleveland, OH, payable over 1 year.  
\$15,000 to Toledo Museum of Art, Toledo, OH, payable over 1 year.  
\$10,000 to Montessori School, payable over 1 year.  
\$10,000 to Museum of Contemporary Art Cleveland, Cleveland, OH, payable over 1 year.  
\$5,800 to Salvation Army, payable over 1 year.  
\$5,000 to Community Foundation of Jefferson County, Steubenville, OH, payable over 1 year.  
\$5,000 to Neighborhood Housing Services, payable over 1 year.

## **43) Lewis and Dorothy Tamplin Trust**

600 S. Main St.

West Mansfield, OH 43358-9510

Contact: Valarie Stanley, Tr.

**Type of Grantmaker:** Independent foundation

**IRS Exemption Status:** 501(c)(3)

**Financial Data** (yr. ended 12/31/06): Assets: \$1,799,708; Total giving: \$62,550

EIN: 347044702

**990-PF:** [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

**Last Updated:** 8/20/2007



### **Background**

Established in 1996 in OH.

### **Limitations**

Giving limited to OH.

### **Fields of Interest**

#### **Subjects**

Aging, centers/services  
Community/economic development  
Education  
Protestant agencies & churches  
Recreation, parks/playgrounds

### **Geographic Focus**

Ohio

### **Application Information**

Application form not required.  
Deadline(s): None

### **Trustee**

Valarie Stanley

### **Financial Data**

#### **Year ended 12/31/06:**

Assets: \$1,799,708 (market value)  
Expenditures: \$85,558  
Total giving: \$62,550  
Qualifying distributions: \$62,550  
Giving activities include:  
\$62,550 for grants

### **Additional Location Information**

County: Logan  
Metropolitan area: Columbus, OH

## **44) Emily Waters Foundation**

10 Center St.

Chagrin Falls, OH 44022-3168

Contact: Don P. Brown, Exec. Dir.

### **Type of Grantmaker**

Independent foundation

**IRS Exemption Status:** 501(c)(3)

**Additional Descriptor:** Family foundation

**Financial Data** (yr. ended 12/31/06): Assets: \$584,535; Total giving: \$34,450

EIN: 341475809

**990-PF:** [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

**Last Updated:** 3/18/2008

### **Background**

Established in 1984 in OH.

### **Limitations**

Giving on a national basis, with emphasis on OH.

No grants to individuals.

### **Fields of Interest**

#### **Subjects**

Community/economic development

Education

Human services

Youth development

### **Geographic Focus**

Ohio

### **Types of Support**

General/operating support

Scholarship funds

### **Application Information**

Application form not required.

Deadline(s): None

### **Officer**

Don P. Brown, Executive Director

### **Financial Data**

#### **Year ended 12/31/06:**

Assets: \$584,535 (market value)

Expenditures: \$69,221

Total giving: \$34,450

Qualifying distributions: \$68,221

Giving activities include:

\$34,450 for 18 grants (high: \$7,100; low: \$100)

### **Additional Location Information**

County: Cuyahoga

Metropolitan area: Cleveland-Elyria-Mentor, OH

## **45) Wolfe Associates, Inc.**

34 S. 3rd St.

Columbus, OH 43215-4201

Telephone: (614) 460-3782

Contact: Rita J. Wolfe, V.P.

**Type of Grantmaker:** Company-sponsored foundation

**IRS Exemption Status:** 501(c)(3)

**Financial Data** (yr. ended 12/31/06): Assets: \$19,800,193; Total giving: \$2,391,480

EIN: 237303111

**990-PF:** [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

**Last Updated:** 12/21/2007

### **Donor(s)**

The Dispatch Printing Co.

The Ohio Co.

WBNS-TV, Inc.

RadiOhio, Inc.

Video Indiana, Inc.

### **Background**

Incorporated in 1973 in OH.

### **Limitations**

Giving primarily in Columbus, OH.

No grants to individuals, or for research, demonstration projects, publications, or conferences.

### **Purpose and Activities**

The foundation supports organizations involved with arts and culture, education, health, youth development, human services, community development, and religion.

### **Fields of Interest**

#### **Subjects**

Arts

Business/industry

Children/youth, services

Community/economic development

Education

Elementary/secondary education

Federated giving programs

Goodwill Industries

Health care

Higher education

Hospitals (general)

Human services

Religion

Youth development

### **Geographic Focus**

Ohio

### **Types of Support**

Annual campaigns

Building/renovation

Continuing support

Equipment

General/operating support

Matching/challenge support

Scholarship funds

### **Publications**

Application guidelines  
Program policy statement

### **Application Information**

Application form not required.

Applicants should submit the following:

1. Population served
2. Copy of IRS Determination Letter
3. Copy of most recent annual report/audited financial statement/990
4. Detailed description of project and amount of funding requested
5. Listing of additional sources and amount of support

Initial approach: Letter of inquiry

Board meeting date(s): Mar., June, Sept., and Dec.

Deadline(s): None

Final notification: Following board meetings

### **Officers and Trustees**

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

John F. Wolfe,\* Chairperson and President

Poe A. Timmons,\* Vice President and Treasurer

Michael Curtin,\* Vice President

Michael J. Fiorile,\* Vice President

James H. Gilmour, Vice President

Nancy Wolfe Lane,\* Vice President

Sara Wolfe Perrini,\* Vice President

Katherine Wolfe,\* Vice President

Rita J. Wolfe,\* Vice President

Sherry L. Lewis, Secretary

### **Financial Data**

#### **Year ended 12/31/06:**

Assets: \$19,800,193 (market value)

Gifts received: \$1,063,975

Expenditures: \$2,520,473

Total giving: \$2,391,480

Qualifying distributions: \$2,391,480

Giving activities include:  
\$2,391,480 for 209 grants (high: \$600,000; low: \$100)

**Additional Location Information**

County: Franklin

Metropolitan area: Columbus, OH

**Selected Grants**

The following grants were reported in 2004:

\$154,291 to United Way of Central Ohio, Columbus, OH, payable over 1 year.

\$102,257 to United Way of Central Ohio, Columbus, OH, payable over 1 year.

\$64,000 to Ohio Foundation of Independent Colleges, Columbus, OH, payable over 1 year.

\$50,000 to Columbus Association for the Performing Arts, Columbus, OH, payable over 1 year.

\$40,000 to YWCA of Cleveland, Cleveland, OH, payable over 1 year.

\$10,000 to Baldwin-Wallace College, Berea, OH, payable over 1 year.

\$10,000 to Columbus Foundation, Columbus, OH, payable over 1 year.

\$2,500 to Columbus Museum of Art, Columbus, OH, payable over 1 year.

\$2,500 to Ohio State University, Columbus, OH, payable over 1 year.

\$2,500 to YMCA of Central Ohio, Columbus, OH, payable over 1 year.