

GOODnews



College Promise Program

“With education, all things are possible”



An idea is a seed. It is filled with potential. But when it becomes a vision and commitment fuels it – that is a very powerful thing indeed.

Longtime Dayton Foundation donor and former Governing Board member John N. Taylor, Jr., had witnessed many programs at work to make people’s lives better. But in Florida, he observed a program

in action that offered underprivileged children who showed academic promise a unique and life-changing opportunity to break the bonds of poverty.

It was Florida’s 15-year-old Take Stock in Children Program and the success it’s had with thousands of underprivileged children that got his attention. The program provides scholarships, mentors

FROM THIS EXPERIENCE CAME THE SEED OF AN IDEA. WHY, HE ASKED HIMSELF, COULDN’T WE START A PROGRAM LIKE THIS IN MONTGOMERY COUNTY?

and other support to give hope to these children. “I studied the program for five years. The kids and their parents sign a contract when they’re in the eighth grade. Their success rate shocked me – 92 percent graduated from high school,” he said, 61 percent higher than Florida’s state average for at-risk

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from the President



90 Years of Helping People Help Others



Michael M. Parks

When Dr. D. Frank Garland watched the beginning of the first community foundation in Cleveland in 1914, he must have known he was witnessing the birth of something big.

Dayton’s NCR director of welfare at that time and an active civic leader, he followed the Cleveland Foundation’s development and came to believe that it was just what Dayton needed. In an effort to build support, he wrote to 10 prominent Daytonians, including John H. Patterson, asking for \$10 each for the creation and dissemination of pamphlets putting forward the idea.

Patterson, founder and chairman of NCR and a highly progressive industrialist and citizen, likewise saw almost immediately the potential of a community foundation that would involve both large and small givers in bettering the community. He enlisted his sister-in-law, Julia Shaw Patterson Carnell, and nephew, Robert Patterson, to join him to con-

tribute a total of \$250,000 to help create The Dayton Foundation on April 5, 1921, and seed it with its first unrestricted endowment.

I suspect that John H. Patterson and his family would have been pleased indeed to have learned that nine decades later, The Dayton Foundation

“...TRUE TO THE ORIGINAL DESIGN TO INVOLVE DONORS FROM ALL WALKS OF LIFE,...THE DAYTON FOUNDATION HAS CONTINUED TO UPHOLD THE VALUES OF INCLUSIVENESS AND COMMITMENT TO THE GREATER GOOD.”

includes 3,000 committed donors and \$370 million in community assets under management (an all-time high), granting more than \$30 million a year to charity and the betterment of their community.

Over 90 years, The Dayton Foundation has continued to evolve in the progressive manner in which Dr. Garland and the Patterson family operated. And true to the original design to involve donors from all walks of life, brought together by a common purpose to help their community, The Dayton Foundation has continued to uphold the values of inclusiveness and commitment to the greater good.

Undertaking community leadership initiatives in recent

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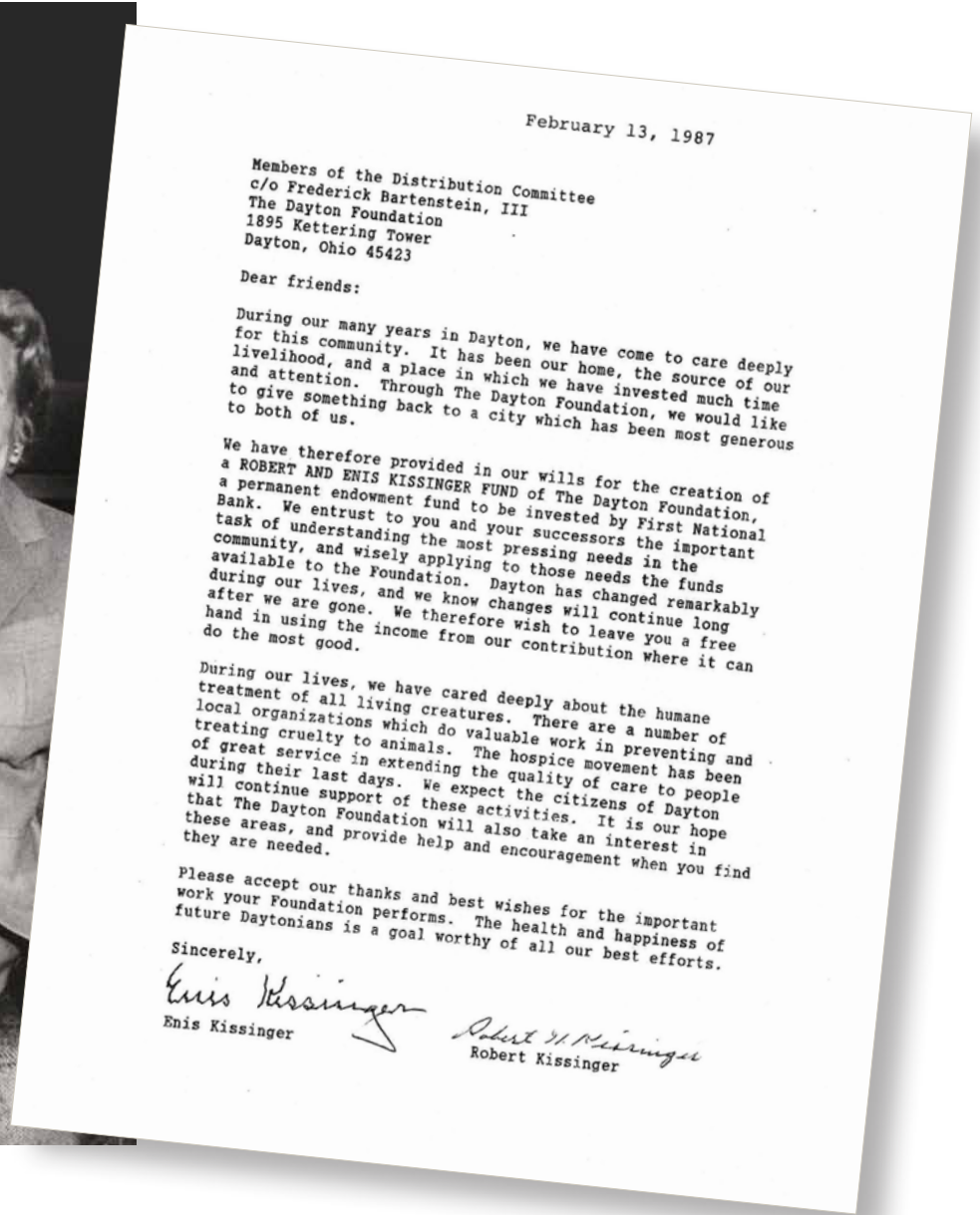
From our history file

Donors Share Their Vision for the Future

Robert and Enis Kissinger had a strong desire to put their charitable funds where the community would need them the most. This letter, penned in 1987 by the Kissingers, former owners of Commercial Heat Treating of Dayton, Inc., began their legacy to the community by establishing a permanent, unrestricted endowment with The Dayton Foundation.

Since 1998, the Robert H. and Enis N. Kissinger Fund has awarded more than \$488,000 to support local charities and Dayton Foundation leadership initiatives and will continue to help local citizens in perpetuity.

We are privileged to serve the Kissingers and all of our Foundation fund donors.



Mark Andrew Kreusch Memorial Fund

Parents keep son's memory alive by helping other children smile

Suzie Kreusch believes in "silver linings." When she and her husband Jon lost their four-year-old son Mark in a boating accident in 2007, it was this belief that led them to find the positive in something so unmistakably tragic.

"Mark had a zest for life that showed through in his smile and giggle," Suzie Kreusch said. "We want to carry on his spirit by doing things in the community that put smiles on other children's faces, especially those who are less fortunate."

The Kreusch family's desire to help children also was fueled by others who wanted to do something in Mark's honor. Just days after their son's passing, Suzie and Jon Kreusch established a Charitable Checking AccountSM (CCA) through The Dayton Foundation to receive donations. They since have converted the CCA into a permanent endowment fund of the Centerville-Washington Foundation, a component fund group of The Dayton Foundation, and named it the



Mark Andrew Kreusch

Mark Andrew Kreusch Memorial Fund.

"We chose The Dayton Foundation because of the flexibility and support we receive in carrying out our charitable wishes," she said. "They have a good reputation in the community, but most of all they gave us the opportunity to continue our wishes in perpetuity."

Since 2008, more than \$32,000 in grants from their fund has been distributed to help children in need. When possible, little reminders of Mark have been incorporated into projects supported by the fund. "For My Friends. Love, Mark Kreusch," is engraved on playground equipment purchased for Christ the King

Preschool. As part of the renovations to a youth activity room at Oak Tree Corner, a center for grieving youth, the artist surprised the family by painting one of the characters in the room's sports arena decor in Mark's likeness. The fund also has helped to purchase 80 school supply kits for students at Grafton Kennedy Elementary in Dayton and sponsored a magic show for A Kid Again, an organization dedicated to children dealing with life-threatening illnesses.

This spring the fund will distribute its largest grant to date to Life Enrichment Center for the construction of a simulated city, featuring 10 scaled-down buildings, traffic signals, street signs and peddle

"WE WANT TO CARRY ON HIS SPIRIT BY DOING THINGS IN THE COMMUNITY THAT PUT SMILES ON OTHER CHILDREN'S FACES."

— Suzie Kreusch, Dayton Foundation donor

cars. The site will be named "MAK Town Safety Village," in honor of Mark Andrew Kreusch, and will help kindergarten through fourth grade children learn bicycle and pedestrian safety.

"The grant from the Mark Andrew Kreusch Memorial Fund was crucial in our ability to move forward with MAK Town Safety Village. This pro-

gram will enable us to impact the lives of countless at-risk children in the Miami Valley," said Jeff Sorrell, executive director of Life Enrichment Center.

Perhaps the most remarkable accomplishment of the fund is the family's and other supporters' efforts to grow it. "The passion that people are committing to this fund is the same passion that Mark lived his life with everyday," Jon Kreusch said.

Past fundraising events include family nights at the Dayton Dragon's field, the annual Mark A. Kreusch Memorial Youth Baseball Tournament at Action Sports Center and The MAK-A-Thon 100 Holes of Golf, a golf tournament in which 30 participants each completed 100 holes of golf in less than 10 hours. This event alone raised \$63,000 for the fund.

"Mark absolutely loved sports. And to see his family and friends coming together to honor him at these events, I know this would make him so happy," Suzie Kreusch said.



Oak Tree Corner's mural of Mark Kreusch

Promise continued

students. And 81 percent of them went on to college, 189 percent higher than their at-risk peer group.

From this experience came the seed of an idea. Why, he asked himself, couldn't we



John N. Taylor, Jr.

start a program like this in Montgomery County? A member of the Sinclair Community College Board of Trustees for a number of years, he had seen at Sinclair what opportunity could do “to give kids a chance in life.” So it was only natural that he went to talk to former Sinclair Community College President Dr. Ned Sifferlen, who chairs the Board of Trustees of the Dayton-



Dr. Ned J. Sifferlen

IN FLORIDA, JOHN N. TAYLOR, JR., OBSERVED A PROGRAM IN ACTION THAT OFFERED UNDERPRIVILEGED CHILDREN WHO SHOWED ACADEMIC PROMISE A UNIQUE AND LIFE-CHANGING OPPORTUNITY TO BREAK THE BONDS OF POVERTY.

Montgomery County Scholarship Program (DMCSP), a longtime and highly respected program within our community and an affiliate of The Dayton Foundation.

Ned Sifferlen liked what he heard and looked into it further. He brought the concept to the DMCSP Board, which today also serves as the advisory committee overseeing the new Montgomery County Ohio College Promise (MCOCP) program. Dr. Donald Thompson, executive director of the DMCSP said, “It was perfect synergy to pull a scholarship program with this much potential under the wing of DMCSP. We foresee the College Promise program having great success.” And so an alliance of vision was born, and the idea took root and began to grow.

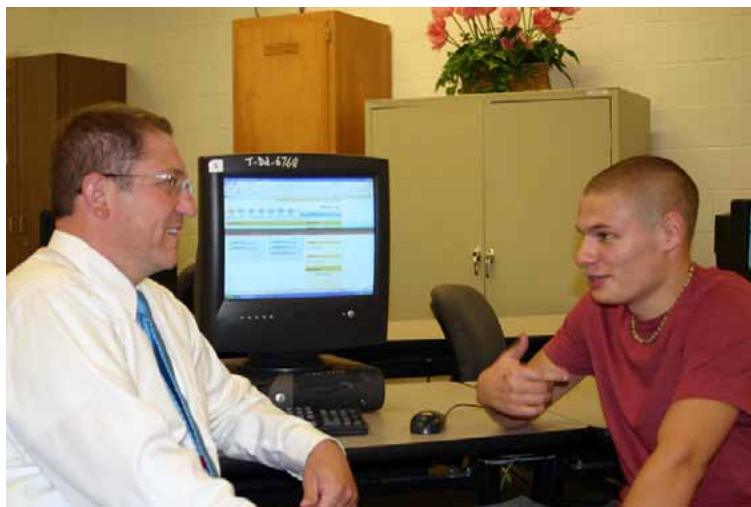
Its mission over 10 years is to identify, select and support up to 500 Montgomery County eighth graders from low-income families, children who have shown academic promise, so they can realize the dream of attending and graduating from college.

The program's new director is Gary Smiga, former superintendent of Centerville City Schools. “We're targeting 40, possibly up to 50 eighth graders this first year and then 40 to 50 each year thereafter for 10 years, for a total of 500 over 10 years.”

Students and parents have to agree to do their part to stay in the program. “The single most important element of the program,” he said, “is that each child will receive the support of a caring, trained and supportive adult mentor who will meet with the child weekly and stay with him or her throughout the program. Those completing high school and meeting college entrance requirements will receive full college scholarships.”

Key to the program, Dr. Sifferlen said, is the partnership and very substantial commitment of Sinclair Community College and Wright State University (WSU).

“Sinclair will provide 40 full scholarships a year beginning in 2015, and Wright State will provide financial support for 20 students a year beginning in 2017, including room and board.” College Promise yearly will give additional support for the 20 WSU students and up to 30 students at other four-year universities through pri-



THE MISSION OVER 10 YEARS IS TO IDENTIFY, SELECT AND SUPPORT UP TO 500 MONTGOMERY COUNTY EIGHTH GRADERS FROM LOW-INCOME FAMILIES, CHILDREN WHO HAVE SHOWN ACADEMIC PROMISE, SO THEY CAN REALIZE THE DREAM OF ATTENDING AND GRADUATING FROM COLLEGE.

vate dollars. So of paramount importance is private support from committed donors and volunteers like John Taylor.

“He committed significant resources to assure the first 50 young people will have the opportunity to complete a col-



Dr. Donald R. Thompson

lege education and come out of college debt free, and also volunteered to fundraise,” Ned Sifferlen continued. “John said, ‘I'll give the first \$500,000 and do whatever it takes to get this started.’ We went together to The Dayton Foundation, which already was providing office space and backroom support, and asked for additional help. The Dayton Foundation pledged \$600,000 over three years. John was so enthusiastic, he pledged another \$300,000. John didn't forget where he came from – he didn't forget Dayton.” And The Dayton Foundation grant not only gave the financial boost needed, he said, “it provided credibility, demonstrating that the idea is a sound one.”

John Taylor echoed Ned Sifferlen about The Dayton Foundation gift from the unrestricted Harry A. Toulmin, Jr., and Virginia B. Toulmin




Gary P. Smiga

Fund. “One of the first questions people ask is, ‘Is The Dayton Foundation involved?’ The grant came right up front when we needed it to cover administrative costs, and made others feel comfortable that the program had been vetted.”

“Providing opportunity and hope for 500 Montgomery County students will have a profound impact both on their quality of life and on that of our community,” said Dayton Foundation President Michael M. Parks. “This is an important effort that I hope will gain widespread support. I'd like to commend John, Ned, DMCSP, Sinclair and Wright State for their vision and tremendous commitment to this very worthy undertaking.”

Dr. Sifferlen noted that to fund the effort they will need other donors and organizations to come forward to donate to the MCOCP Fund at The Dayton Foundation or even agree to sponsor (\$15,000) or co-sponsor (\$7,500) a child. Also needed will be adult mentors for the program. People interested in helping can contact Gary Smiga at (937) 225-9922 or go online to their website at www.mocp.org for more information. The hope, he said, is that this program will extend beyond the first 10 years.

“I've watched over the years,” John Taylor said, “and seen that programs like these really do change lives. This gives low-income kids a chance for a much better life.” 

“PROVIDING OPPORTUNITY AND HOPE FOR 500 MONTGOMERY COUNTY STUDENTS WILL HAVE A PROFOUND IMPACT BOTH ON THEIR QUALITY OF LIFE AND ON THAT OF OUR COMMUNITY.”

– Michael M. Parks, president, The Dayton Foundation

Donors establish funds to help others

endowment

Establishing a strong foundation for our community's future is a vision shared by donors who have endowment funds at The Dayton Foundation. The following funds are some of the new endowment funds established by donors in recent months to support our region and their special charitable causes, now and in the future.



Steffen Brown

Steffen Brown Foundation Fund carries out a longstanding family tradition of serving the community's educational needs and will include grants to the University of Dayton for a scholarship fund and other leadership and educational programs. This field-of-interest fund was converted from a private foundation of the same name by the children of Steffen and Marianna Brown.

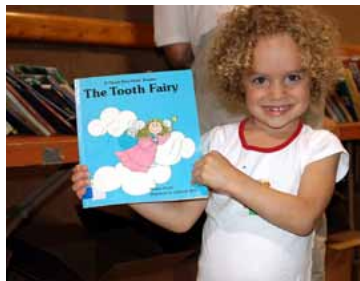


Orville M. Cotterman

Orville M. Cotterman Charitable Fund provides operating funds to the Historical Society of Vandalia-Butler and Vandalia United Methodist Church. Orville Cotterman, a retiree of Frigidaire and a former Vandalia City councilman and School Board member, was a life-long resident of Vandalia until his passing in 2010.

Dayton Catholic Women's Club (DCWC) Scholarship Fund aids graduating high school women of the Roman Catholic faith in furthering

their education at institutions of higher learning. DCWC was established in 1923 to promote a spirit of unity and cooperation among Catholic women in religious, educational, social and humanitarian interests and benevolent works.



Dayton Metro Library

Dayton Metro Library Endowment Funds provide annual operating funds to enrich the lives of all residents through library programs, including purchasing books and media, hosting speakers and other events, and enhancing spaces for reading, learning and community dialogue.

Friends of the Greater Downtown Dayton Plan Fund furthers the charitable work, projects and initiatives of the Dayton Downtown Plan of 2010 by providing funds to promote the revitalization and economic development of downtown Dayton.

Friends of Ohio's Great Corridor Fund helps promote opportunities for urban and rural communities to cooperate and bring vitality along the Great Miami and Mad River corridors.

Friends of St. Albert the Great Catholic Church Fund seeks to support this longtime Kettering church by providing annual, unrestricted operating revenue. Established in 1939 with fewer than 50 parishioners, the church's current community includes 2,300 families.



The Hausfeld Family

Kacie and Tom Hausfeld Scholarship Fund helps Archbishop Alter High School graduates further their studies at the University of Dayton (UD). The fund was established by friends and family and serves to remember Tom Hausfeld, a retired business owner and active Alter High School volunteer, and his

daughter, Kacie, an Alter High School graduate and UD volleyball player, who perished in a plane crash in 2010.



Sara Kimmel Lytle

Lytle-Kimmel Fund initially awards grants to the donor's designated charities and eventually becomes an unrestricted fund to enable The Dayton Foundation to help meet changing community needs. The fund honors the memory of Sara Kimmel Lytle, a life-long member of St. Paul's Episcopal Church, and her husband, Mason Hooker Lytle. The Lytles were married for 64 years.

Montgomery County Ohio College Promise (MCOCP) Fund supports a program developed in cooperation with the Dayton-Montgomery County Scholarship Program, Sinclair Community College, Wright State University and other local partners. This program seeks in the next 10 years to identify, select and support up to 500 Montgomery County, poverty-impacted, eighth grade students who have shown academic promise so that the dream of attending and graduating from college becomes a reality.

Moraine Rotary Scholarship Fund awards scholarships to graduating high school seniors living in Moraine who have been accepted to two- or four-year colleges or universities.

Muse Machine Fund in Honor of Moses Hogan and Mary-Kate Tews provides an annual scholarship to a senior Muse Machine musical cast member to continue his or her studies in music, acting or dance. The fund was established in memory of Moses Hogan, a world-renowned composer, and Mary-Kate Tews, an artist and educator who helped in planning for the 1996 Summer Olympics in Atlanta.

Marianna K. Oliver Fund honors the memory of this former Oakwood resident and St. Paul Episcopal Church member by designating funds to Daybreak, Inc., in perpetuity.

Alvarene N. Owens Endowment Fund* will support charitable activities of the donor's choosing. Alvarene Owens, a longtime Dayton attorney, was the first woman and minority to be appointed to the Board of the Ohio Academy of Trial Lawyers.



Elizabeth and John E. Purdy

John E. and Elizabeth Purdy Fund, established from the remains of a Charitable Remainder Trust and a Pooled Income Fund, will help meet pressing needs in the Greater Dayton Region, as identified by The Dayton Foundation. John "Jack" Purdy, a World War II veteran and founder of Dayton Showcase Company, and his wife, Elizabeth, were married for nearly 58 years.



Nancy Ellen Wegner Schumacher and Robert Frederick Schumacher

Nancy Ellen Wegner Schumacher and Robert Frederick Schumacher Scholarship Fund helps Vandalia-Butler High School students pursue a degree in engineering, math or science. Robert Schumacher, a World War II veteran and manufacturing engineer for 30 years, retired from Chrysler Corporation in 1982. Nancy Schumacher worked as a chemist at General Motors until her marriage to Robert in 1953. During her years as a homemaker, she combined her chemistry experience with her love of cooking to develop new recipes.

Fred and Pfeiffe Smith Fund to Benefit St. Paul's Episcopal Church honors the memory of these longtime community leaders and provides unrestricted operating revenue to St. Paul's Episcopal Church in Oakwood. Fred Smith, retired chair of Huffy Corporation and former chair of the Governing Board of The Dayton Foundation, and Pfeiffe Smith shared a passion for community service and helping others.


Sunshine Fund awards annual distributions to the *seedling* Foundation, a nonprofit organization that supports arts and educational programs at Stivers School for the Arts in Dayton, mainly in the form of scholarship assistance. The fund also contributes to and supports other entities and activities related to education.

Three Valley Conservation Trust Fund for Scholarships (In memory of Frank and Esther Breen Senicka and James and Anne Ruder Bever) grants funds to the Three Valley Conservation Trust for the purpose of awarding scholarships for accredited post-secondary education.



Virginia B. Toulmin

The Harry A. Toulmin, Jr., and Virginia B. Toulmin Fund perpetuates the Toulmin's passion for the Greater Dayton Region by enabling the Governing Board to award discretionary grants where the community most needs them. Virginia B. Toulmin, an exceptional philanthropist and businesswoman, established the fund, which serves to remember her and her husband. Harry A. Toulmin, Jr., was a successful attorney and business owner and the son of the attorney who secured and defended the patents for the Wright Brothers' flying machines.

UTS-Pohly Center Fund provides annual financial support to the United Theological Seminary's Pohly Center for Supervision and Leadership Formation. 

*African-American Community Fund

Throughout the Foundation's 90 years – Giving for Yesterday, Today and Tomorrow

Since 1921 The Dayton Foundation, on behalf of Foundation donors, has awarded more than 225,000 grants totaling nearly \$567 million – \$366 million in the last 10 years alone. From these grants have emerged tremendous efforts to make our community a better place to live. One can say that in one way or another, The Dayton Foundation has touched the lives of nearly everyone in our region.

From the beginning, the Foundation focused its discretionary grantmaking on projects that would help those who needed it most or where opportunity was greatest. Grants to provide free dental clinics during the Great Depression, special leg braces for children suffering from polio and counseling services for World War II veterans were just a few such projects.

Also of considerable support during the early years were camps and other children's programs. In 1927 the head of Dayton's Boy Scout Council wrote, "That \$306 voucher we received from The Dayton Foundation this morning will give 51 orphans a million dollars worth of fun."

During World War II,



when many parents were serving in the military or working in the factories, the Foundation funded "Day Gang" after-school programs to keep youth off the streets.

Reflecting the Foundation's vision for improving the quality of life in the city, substantial support was given to the Dayton Research Association during the 1920s and 1930s. Operating as a "watchdog" for local governments, the Association embarked on a three-year investigation of the Montgomery County Board of Elections, accused of inefficiency, mismanagement and, possibly, influence by the Ku Klux Klan. Thanks to nearly \$30,000 in grants from the Foundation, the Association's study resulted in a more honest and efficient elections board, whose operations served as a national model.

Discretionary grants through the years have helped strengthen the region and give hope to those in need.



As the decades passed, The Dayton Foundation's leadership role took shape with more funding dedicated to groundbreaking programs and projects. To address the growing threat that alcohol and narcotics posed to area youth in the 1950s, the Foundation funded the Committee on Narcotics, the first such committee in Ohio, and awarded grants for educational programs that would prevent young people from developing habits or behavior that might lead to substance abuse.

The 1980s welcomed a



new era of community commitment for the Foundation, as its assets grew from \$3 million in 1980 to \$40 million by 1990. Innovative initiatives from this point forward were far-reaching and enabled the Foundation to proactively solve immediate issues.

In the late 1980s the Foundation funded the Dayton Self-Sufficiency Program, an in-depth study of the impediments to self-sufficiency that led to the creation of the Montgomery County Job Center in 1997. Today it houses 47 agencies and serves an estimated 2,500 people a day – more than 3 million since its inception.

The Out-of-School Youth Program, launched in 2001, helped provide alternative educational programs for area youth deemed lost to the school system and destined to end up in prison. Thanks to the Foundation's and others' support of this effort, Sinclair Community College's Fast Forward Center was

established, helping to reduce Montgomery County's dropout rate from 25 percent to 12.7 percent and giving kids a second chance.

There have been many other efforts, including Neighborhood School Centers that is working to build stronger urban neighborhoods, the Minority Economic Development Council, now known as the Minority Business Partnership, which is harnessing the business resources of all citizens to improve economic development in the region, and the Benjamin and Marian Schuster Performing Arts Center, which The Dayton Foundation supported with a \$1-million grant and provided backing for bonds to be issued so that the building could go forward.

For 90 years The Dayton Foundation has held to its original ideals of working with others to fulfill the community's unmet needs. Thanks to Foundation donors, community leaders and other partners, The Dayton Foundation will continue to do so long into the future and build a better Greater Dayton Region.



President continued

decades has been an evolutionary way of expressing those values. A recent initiative has been in the area of diversity and inclusion, specifically in regard to growing minority business economic opportunity for the betterment of our community's economic health as a whole.

We have reported in the past on the progress of the Commission on Minority Inclusion and the Minority Economic Development Council (MEDC), an initiative of The Dayton Foundation and the Dayton Business Committee. The Commission and MEDC have made important strides to develop minority economic potential by forging stronger links between majority and minority businesses and helping foster supplier inclusion programs.

Over the three years that MEDC operated under the

above structure, the level of sensitivity to the importance of forwarding this work for the improved economic health of our region has grown exponentially. This issue was under the radar and received little attention before the establishment of MEDC, Channon Lemon's able staff leadership and the volunteer leadership of Al Wofford and Bruce Feldman. Today this organization has become one of the major forces for the success of our region's economic development.

"...IN OUR 90TH ANNIVERSARY YEAR, WE'D LIKE TO GIVE SPECIAL THANKS TO ALL OF OUR DONORS WHO HAVE MADE THE DAYTON FOUNDATION WHAT IT IS TODAY – A COLLECTIVE FORCE FOR GOOD AND A COLLABORATION OF SPIRIT OF THE LARGEST AND BEST KIND...."

It's worthy to note the collaborative manner in which this initiative took hold. The Dayton Area Chamber of Commerce, the universities, Sinclair Community College, the county, the city, the Dayton Business Committee and a very supportive group of private funders all came together under a common goal and demonstrated the collective power of working together. This exemplifies exactly what we believe our region needs to meet the challenges and opportunities of the future.

In October, an important new chapter began when the Dayton Area Chamber of Commerce brought MEDC into its structure and gave it a new name, the Minority Business Partnership (MBP). It now is one of the specialized services that the Chamber offers to area companies and will create new joint ventures between minority- and majority-controlled companies. Chamber President and CEO Phil Parker has stated that this will "champion diversity and inclusion practices and culture

in companies' strategic purchasing and workforce plans for the future," while "growing the pie for all participants."

We couldn't be more pleased to have Phil Parker and the Chamber's leadership at this crucial juncture. Their leadership and connections will allow a deliberate and ongoing effort to further the MBP's work and grow the future of both minority- and majority-owned businesses in our region. I commend the Chamber for stepping up to lead on this critical regional issue.

Finally, in our 90th Anniversary year, we'd like to give special thanks to all of our donors who have made The Dayton Foundation what it is today – a collective force for good and a collaboration of spirit of the largest and best kind – and our many volunteers and staff members who have forwarded the Foundation's work over the decades. In this spirit, we'd like to welcome new Governing Board member Jim Pancoast, the recently named president and

chief executive officer (CEO) of Premier Health Partners. His executive and community experience will be very helpful to the Foundation as we go forward.

Special thanks go to three outgoing Board members – Tom Breitenbach, Fred Setzer, Jr., (who also served as a former Board chair) and Rick Schwartz – all of whom gave more of their time and talent to the Foundation and our community than we can begin to recount. We wouldn't be the Foundation we are today or have accomplished as much without these three tireless and talented volunteers. Our deep appreciation goes to them for all they have done – and continue to do – and to all of our dedicated donors and volunteers who every day make our region better for all of our citizens.

Michael M. Parks,
president

Caring for Alzheimer's Patients Made Easier thanks to Dayton Foundation grant

The Dayton Foundation recently awarded a \$17,000 discretionary grant to the Miami Valley Chapter of the Alzheimer's Association for its Reducing Disability in Alzheimer's Disease (RDAD) program. The local chapter offers the program in conjunction with the Ohio Department of Aging and the Benjamin Rose Institute.

And Kettering resident Dolores Morrella couldn't be happier.

Dolores's husband, Jack Morrella, is one of the over 30,000 individuals within a 50-mile radius of downtown Dayton living with a diagnosis of Alzheimer's, a disease that attacks the brain. It is the most common form of dementia, impacting the lives of at least three other individuals for every person diagnosed, but it is not a mental illness.

"As our population grows older and nursing home admissions continue to increase, the RDAD program is hoping to improve the ability of the person with the Alzheimer's disease and help the caregiver to provide assistance to their loved one in the home, which in return may

delay nursing home placement," said Julie Worley, Family Assistance director of the Miami Valley Chapter of the Alzheimer's Association.

Through the program, Association staff visit individuals with dementia and their caregivers. During a one-year period, the staff will make 14 individual, intense home visits with each dementia patient and caregiver and 2 by phone. These visits include an assess-

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— Julie Worley, Family Assistance director, Miami Valley Chapter of the Alzheimer's Association



New Dell computers will allow more time to support clients.


ment of each person's ability; a thorough explanation of program expectations; instruction on strength, balance and flexibility exercises; and additional instruction to caregivers like Dolores about caregiver wellness, nutrition and how to develop realistic expectations. They also provide follow-up visits to review the individual's safety, monitor exercise skills, address any behavior issues and work with the caregiver to resolve any additional issues.

At the end of the year, staff will assess the individual and caregiver to determine the level of success attained, with the goal of allowing the individual to remain in his or her own home.

In administering the RDAD program, a problem surfaced, according to Julie Worley. Staff would update the individuals' and caregivers' information in a paper file on site, then type the information into the Chapter's dated computer system when they returned to the office. This essentially doubled the time

and work involved in maintaining accurate files. That's where The Dayton Foundation's grant came in, enabling staff to spend more time on site with the families.

"Thanks to The Dayton Foundation, we were able to replace our computer server and add four notebook computers," Julie Worley said. "This has enabled our staff to connect electronically with client information and update it during the visits, affording them more face-to-face time with the clients and increasing their support." And less time shuffling paper.

"At first, I was apprehensive about doing the exercises," Dolores Morrella recalls. "We used to just sit; there was something missing in our lives. But the exercises were a lifesaver, because Jack and I do them together. Now we have fun. We laugh while we do them. Jack is so happy with the exercises that they have brightened up our home. And it makes me feel good doing something that he loves." 

Getting Started with The Dayton Foundation Create a charitable legacy by donating closely held stock



By Joseph B. Baldasare, MS, CFRE, vice president, Development

A growing number of businesses – some say half or more of the businesses in the United States – are classified as closely held businesses with S corporation stock, which is not publicly traded. When a small business owner

considers selling his or her company, he or she may want to consider donating shares of the company's stock at the appraised, fair market value to establish a charitable fund through The Dayton Foundation. By doing so, the business owner could benefit from significant tax savings and then use his or her Dayton Foundation fund to benefit the charities he or she cares about most and to make a lasting philanthropic legacy.

By donating the stock, versus selling it outright, the business owner receives a valuation of the stock and may avoid paying long-term capital gains taxes on the difference between the cost basis and today's value. For businesses that have very little cost basis beyond their sweat equity, this

can be a significant savings. The donation can be used to establish a named endowment fund through The Dayton Foundation to benefit the charities or causes the business owner cares about most in perpetuity or a Charitable Checking AccountSM to help fulfill the owner's current charitable giving needs.


For example, John Donor is thinking about selling his company and retiring so that he may enjoy the fruits of his labor. He holds 1,000 shares of the company's S corporation stock that would be purchased by the company upon his retirement, most of which will fund his retirement years. Mr. Donor also deeply cares about continuing to provide for his church and the local hospi-

tal, so he decides to establish a charitable fund in his and his wife's name through The Dayton Foundation. Most of his personal net worth is in his company, so to seed his charitable fund, he decides to donate 100 shares of his S corporation stock to the Foundation. Typically the company will buy back the stock from The Dayton Foundation at an agreed-upon price, and the assets from the sale will be placed in the donor's Dayton Foundation endowed fund. The Dayton Foundation then will manage the charitable fund according to Mr. and Mrs. John Donor's wishes, making annual distributions to the hospital and their church in their name, in perpetuity.

With gifts of closely held stock, the IRS requires an

impartial appraisal if the deduction claimed exceeds \$10,000.

This is a broad overview of how to use S corporation stock to make a charitable gift for current and future giving. More information is available on our website at www.daytonfoundation.org/clstockqa.html.

As you consider your plans, you or your professional advisor may contact me, Joe Baldasare, vice president of Development, to discuss this and other charitable gift options through The Dayton Foundation to meet your individual charitable goals. You can reach me at (937) 225-9954, or at jbaldasare@daytonfoundation.org. 

Founders

The Beginning of The Dayton Foundation in 1921

When The Dayton Foundation was established in 1921, the concept of a charitable foundation to meet the needs of a rapidly growing and changing society was not widely known. Harnessing the collective power of a community's philanthropic means to effect change where it was needed most was a concept first embodied in the Cleveland Foundation in 1914.

Locally, Dr. D. Frank Garland, then-director of welfare for the National Cash Register (NCR) Company, longtime social activist and the person who first raised awareness of the idea in Dayton, found a supporter in his boss, NCR founder and Chairman John H. Patterson. For decades, Patterson championed innovative projects for the betterment of the community and pioneered the first corporate employee benefits program in the nation, extending his social welfare



Dr. D. Frank Garland

ideas into the region. The idea of a community foundation was intriguing to him and provided a permanent solution to benefit his hometown and the region where he made his success. As he once said, "I endow people. My best investments are in humanity."

Joining him in his enthusiasm was his sister-in-law, Julia Shaw Patterson Carnell, and nephew, Robert Patterson, son of John Patterson's brother,



John H. Patterson

Capt. Robert Patterson, all active community leaders in their own right. A leading businesswoman, Julia Patterson Carnell helped establish the Dayton Art Institute by donating works of art, a mansion that served as the museum's first home and \$2 million towards the construction in 1930 of its current facility.

Robert Patterson was a senior executive at NCR and a leader in community affairs.



Robert Patterson

He helped to found the local Boy Scouts and the Dayton Rotary Club and was active with the YMCA, Chamber of Commerce and Miami Valley Hospital.

Together, the Pattersons donated appreciated NCR stock valued at \$250,000 (the equivalent of \$2.8 million today) to establish The Dayton Foundation's unrestricted endowment. Guiding the Foundation in its work then



Julia Shaw Patterson Carnell

and today are two principles set forth in the original governing document, "First, the element of certain and constant change, which is continually taking place in our social structure; and second, that the charitable problems of each generation can more effectively be solved by the minds of these generations than by the dead hand of the past."



Recent Discretionary Grants

help enhance our community's future

In the second half of 2010, The Dayton Foundation awarded more than \$16.5 million in grants from donor funds to a wide variety of charitable organizations in the Greater Dayton Region and beyond. A portion of this amount was made through the Foundation's discretionary grants program, made possible by donors who have provided unrestricted or largely unrestricted funds to The Dayton Foundation to act on opportunities for the community and address pressing needs throughout the region.

In December the Foundation awarded \$148,000 in discretionary grants, which are approved by the Foundation's Governing Board, to assist the following charitable organizations in helping Greater Dayton.

AIDS Resource Center Ohio (\$20,000) to help explore a possible alliance with the Columbus AIDS Task Force to reduce duplication of efforts and costs, as well as enhance programming.

Daybreak (\$20,000) to assist in establishing a group home with mental health and support services for runaway and homeless youth.

Dayton Contemporary Dance Company (\$10,000) to support the Steps on the Stairs youth education program that illustrates the life, work and times of Paul Laurence Dunbar.

Dayton Crayons to Classrooms (\$15,000) to help expand their services in the region by providing basic school supplies to nine additional schools.

Dayton Tooling & Manufacturing Association (DTMA) Foundation (\$8,000) to help students gain practical knowledge of math, science and engineering by building remote-controlled robots.

Good Neighbor House (\$10,000) to assist in expanding its dental services to the growing number of individuals in need in Montgomery County.

Goodwill Easter Seals Miami Valley (\$15,000) to help provide career counseling, assistive technology



Good Neighbor House

devices and training in the use of technology for youth with visual disabilities.

Life Enrichment Center (\$10,000) to support the development of the East Side Nonprofit Resource Center, in cooperation with the Life Resource Center and other nonprofits. This effort is part of The Dayton Foundation's Nonprofit Alliance Support Program.

Ohio Historical Society (\$15,000) to help repair windows in the historic Carnegie Library, which houses the National Afro-American Museum and Cultural Center.



Life Enrichment Center

YMCA of Greater Dayton (\$25,000) to assist in building a new recreation hall at Camp Kern to expand its indoor programming space for youth and small groups.



Dayton Contemporary Dance Company





The Regional Community Foundation

500 Kettering Tower
Dayton, Ohio 45423
Phone (937) 222-0410
Fax (937) 222-0636
Web www.daytonfoundation.org
E-mail info@daytonfoundation.org

President: Michael M. Parks. **Governing Board:** Gary L. LeRoy, chair, Craig J. Brown, Ellen S. Ireland, Charles A. Jones, Helen Jones-Kelley, Anita J. Moore, James R. Pancoast, Vicki D. Pegg, Colleen M. Ryan, Douglas C. Scholz, Charles G. Schroeder, Jerome F. Tatar, Fred E. Weber. **Financial Managers:** Ameriprise Financial Services, Inc.; Robert W. Baird & Co., Inc.; Behnken and Associates, Inc.; Buckingham Financial Group; C.H. Dean and Associates; ClientFirst Financial Strategies, Inc.; Cornerstone Financial Group; Dover Partners; Eaton National Bank; Eubel, Brady & Suttman Asset Management; Fiduciary Trust Company International; Fifth Third Bank; The Huntington; JP Morgan; James Investment Research, Inc.; Johnson Investment Counsel; KeyBank, NA; Liberty Savings Bank, FSB; Linsco/Private Ledger Financial Services; Merrill Lynch and Company; Michael J. Monaghan & Associates; Morgan Stanley Smith Barney; Northwestern Mutual Fund Services; Oxford Financial Advisors Corp.; PNC Bank, Ohio, NA; Parker Carlson & Johnson; Principled Wealth Advisors; Prudential Preferred Financial Services; Transamerica Investment Management, LLC; Truepoint Capital, LLC; UBS Financial Services, Inc.; US Bank; Wells Fargo Advisors. **Investment Consultant:** Fund Evaluation Group, Inc.

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GOODnews

INSIDE

Good News is made possible by four Dayton Foundation donors and families who have stepped forward to become the 2010-2011 "I Believe!" Partners of The Dayton Foundation. Their commitment underwrites a full year of Dayton Foundation publications, thereby freeing resources for the Foundation's other community work.

Thanks go to "I Believe!" Partners Carol & Jack H. Adam, Leona E. & Jane A. Dunwoodie, Janet A. & Donald L. Grieshop, and Marcia L. & Donald J. Schade, and for support from The Standard Register Company and from 90th Anniversary media sponsor Cox Media Group Ohio.

- 🎉 **College Promise Program: "With Education, All Things Are Possible"**
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GOOD NEWS: FIVE-TIME NATIONAL AWARD-WINNING PUBLICATION, WILMER SHIELDS RICH AWARDS, COUNCIL ON FOUNDATIONS

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The Dayton Foundation News

Foundation's Governing Board Welcomes a New Member



James R. Pancoast

James R. Pancoast, president and chief executive officer (CEO) of Premier Health Partners, has been named to The Dayton Foundation Governing Board.

Mr. Pancoast's career in healthcare administration has spanned more than 30 years and includes positions as president and CEO of Good Samaritan Hospital and Samaritan Health Partners, executive vice president and chief oper-

ating officer of Good Samaritan Hospital, president of Premier HealthNet and president of Fidelity Health Care.

Among his many community and not-for-profit affiliations, Mr. Pancoast currently serves on the boards of the Dayton Area Chamber of Commerce, the Montgomery County Human Services Levy Council and The Dayton Art Institute. He also serves on the regional policy board of The American Hospital Association.

Biennial Celebration Event Kicks Off Foundation's 90th Anniversary with Record Attendance

Dazzling performances from local arts organizations, the premiere of the Foundation's newest video and nearly 700 guests – more than any previous Foundation event – made

"YOU CELEBRATED THE HEART OF THIS COMMUNITY."

– Jay Woodhull, director, Cox Arboretum MetroPark

The Dayton Foundation's 2010 Biennial Meeting Celebration a great way to kick off the Foundation's 90th Anniversary.

Donors and friends of the Foundation gathered at the Benjamin and Marian Schuster Performing Arts Center on November 9 to celebrate this momentous occasion, called "Celebration! 90 Years of Helping You Help Others." Gary L. LeRoy, M.D., chair of the Foundation's Governing Board, welcomed guests, while President Michael M.

Parks gave the Report of The Dayton Foundation. Performances by the Dayton Contemporary Dance Company II, The Human Race Theatre Company, The Muse Machine and Richens/Timm Academy of Irish Dance, presented by Cityfolk, rounded out the program in the Mead Theatre, along with a presentation of the Foundation's newest video, *A Community Is Defined by the Passion of Its People – Stories of Caring & Commitment*.

To view the video, visit the



Nearly 700 guests celebrated at The Dayton Foundation's 2010 Biennial Meeting at the Schuster Center.



Dayton Foundation donor Ruth Richardson (left) and Sue Ciarliariello enjoy the festivities.

Foundation's website at www.daytonfoundation.org/videos.html.

"LAST NIGHT WAS A WONDERFUL, FIRST-CLASS CELEBRATION. WE ARE PROUD TO BE A PART OF THE DAYTON FOUNDATION FAMILY."

– Virginia Kuertz, market director, JPMorgan Chase & Co.