



Spirit

THE COLUMBUS FOUNDATION

2012 ANNUAL REPORT





THE *Spirit* OF COLUMBUS[★]™

★
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It takes courage
and vision to build
a city.

But to create a
community of which
you are proud
to call home—
that takes *spirit*.



**IT IS THIS SPIRIT WE AT THE
COLUMBUS FOUNDATION
CELEBRATE EVERY DAY.**

It's the way people feel walking along the Scioto Mile, or catching a ball game at Huntington Park. It's the chill of winter as you walk through Wildlights at the Columbus Zoo and Aquarium, and the warmth on your face admiring art downtown during summer festivals.

It's an optimism we carry with us—even greater things lie ahead.

In 2012, the Foundation was proud to commemorate this spirit during a year-long celebration of our city's vibrant history—the Bicentennial.

Over the past 200 years, our community has benefited from individuals, families, and businesses who have all harnessed this spirit to identify and support existing and future needs in our city. This spirit inspired them to do more, see more, help more—and it continues today.

Your investments in your community strengthen it for future generations. Your generosity and support of the organizations and programs most important to you is a catalyst for change, and is inspiring others to embrace this great community in which we live.

As Jerrie Mock, first woman to fly solo around the world, so eloquently put it in a recent message to The Columbus Foundation's donors, "Long live The Spirit of Columbus!"

Dear Friends,

At the heart of the *philanthropic spirit* that defines us is a belief that acts of individual generosity—and their collective impact—have a far-reaching effect in creating a place where everyone can thrive. It happens because of your commitment to strengthening and improving our **SMART + OPEN** community.

For nearly seven decades, the Foundation has helped individuals, families, businesses, and communities in 55 Ohio counties and 37 states reach their unique charitable goals. We are proud and honored to serve as your trusted philanthropic advisor.®

Last year, contributions made to the Foundation and our Supporting Foundations exceeded all previous records—with gifts totaling more than \$326.4 million. This 31 percent increase in gifts over the previous record year was the result of broad participation in the Foundation, including 5,600 gifts from the community and the creation of 142 named funds by our family of donors. Planned gifts strengthen a powerful legacy to benefit our community in perpetuity. In 2012, we learned of more than \$23.2 million in planned gift expectancies, bringing total planned gift expectancies to \$843.7 million.

Your generosity, coupled with a strong investment performance, contributed to steady growth in 2012. As of December 31, 2012, our assets surpassed \$1.52 billion held in 2,007 charitable funds in The Columbus Foundation, Community Foundations, Inc. (our statewide affiliate), and 29 Supporting Foundations.

Grants by the Foundation and donors continue to make a powerful impact in moving our community forward. Last year, \$96.6 million in grants benefited 2,579 nonprofits—from arts and education to housing and healthcare—primarily in central Ohio. Scholarship grants totaled \$1.77 million and enabled more than 700 students to realize the dream of a higher education at colleges and universities throughout the United States.

We are committed to continually improving our philanthropic services,

adding value to your charitable giving experience, and making our research and community knowledge available to you. By having a better understanding of our community, we can create, leverage, and strategically deploy assets to make the best investments possible in philanthropy.

The Weinland Park Collaborative, an effort to revitalize the Weinland Park neighborhood just east of The Ohio State University and south of 11th Avenue, was launched in 2010 and involves many partners working with The Columbus Foundation, including Cardinal Health, JPMorgan Chase Foundation, The Ohio State University, Campus Partners, the City of Columbus, and United Way of Central Ohio. Last year, Weinland Park was selected as one of three neighborhoods nationwide to receive a seven-year, multimillion-dollar commitment from the Baltimore-based Annie E. Casey Foundation to improve the lives of children and their families.

Thanks to your generous response, the 2012 *Critical Need Alert for Hunger* quickly and effectively helped 10 area food pantries and soup kitchens purchase equipment needed to successfully shift to providing fresh, nutritious food to those in need.

Our Investments in technology and new products are focused on

Why does The Spirit of Columbus™ matter? As a U.S. President said just over 50 years ago: “...I am certain that after the dust of centuries has passed over our cities, we, too, will be remembered not for victories or defeats in battle or in politics, but for our contribution to the human spirit.”

making your charitable giving experience as convenient as possible. We continue to improve PowerPhilanthropy,® our online marketplace of more than 630 community nonprofits. Many of you use PowerPhilanthropy to research and make grants and gifts to benefit the nonprofits you care about. Our new Spirit of Columbus Charitable Gift Card will help Columbus Foundation donors easily share the gift of giving with friends and family. We are pleased to offer this new service to you—the first of its kind in the state of Ohio.

Our extraordinary Governing Committee guides the Foundation and offers valuable leadership and expertise. We offer our gratitude to Committee member Bruce A. Soll, who completed his term of service in 2012. His insights and passion for the community greatly contributed to our success.

Above all, we thank you, our donors and friends, for your spirit and determination to make our community a better place for all—from Sunday to game day! ★



DOUGLAS F. KRIDLER
President and CEO

MICHAEL J. FIORILE
Chairman



“SPIRIT OF COLUMBUS”

HONORING TRAILBLAZING
AVIATOR JERRIE MOCK

From the arts to business, from restaurants to neighborhoods, from Sunday to game day, The Spirit of Columbus fuels and defines us today more than ever.

Jerrie Mock’s “Spirit” helped her fly into the record books in 1964.

The 38-year-old, born in Newark and living in Bexley, had always been a big dreamer. The mother of three took off from Port Columbus Airport on March 19, 1964, on a mission to become the first woman to fly solo around the world. Lifting off in her 11-year-old single-engine Cessna, the “Spirit of Columbus,” she heard the tower controller say, “Well, I guess that’s the last we’ll hear from her.”

But it wasn’t. More than 29 days and 23,000 miles later, Jerrie triumphantly landed back in Columbus.

There are countless people in our community who have harnessed their passion and determination to make great things happen. Jerrie is a defining example of the spirit that moves us to do great things. ★

“Columbus is a great community, and I appreciate all that you are doing to respect its history and to build an even better future.”

—JERRIE MOCK





2012 PHILANTHROPY AWARDS



Photo courtesy of the Barkley family

2012 HARRISON M. SAYRE AWARD WINNERS

Bob and Missy
Weiler



Bob and Missy Weiler were honored with the 2012 *Harrison M. Sayre Award* for their role as community champions who have dedicated their time, talents, and financial support to help strengthen our city. The award, first presented in

1990, is given in honor of the Foundation's founder and 25-year volunteer director, and recognizes leadership in philanthropy in central Ohio.

Bob serves as chairman of the board of The Robert Weiler Company, and since 1999 has been chairperson of the *Community Gifts Foundation*, a Supporting Foundation of The Columbus Foundation. An active contributor to the community for many years, he has served as a board member, trustee, and director for many local organizations. Missy has been a longtime volunteer with numerous entities, including Columbus City Schools and The Ohio State University Hospital East.

Bob and Missy's first fund at The Columbus Foundation, the *Robert J. Weiler Fund*, was created in 1986. In 1998, the couple established two additional funds, the *Robert J. Weiler Family Fund* and the *Bob and Missy Weiler Fund for United Way of Central Ohio, Inc.* Through these funds, the couple has generously supported a wide variety of charitable interests.

"We're living our beliefs," said Bob. "There's no such thing as a self-made man or woman—everybody's had help along the way. I'd like to think that we're known for helping others like we've been helped."



Photo courtesy of Habitat for Humanity-MidOhio

2012 COLUMBUS FOUNDATION AWARD WINNER

Habitat for Humanity—
MidOhio



As the 2012 recipient of *The Columbus Foundation Award*, Habitat for Humanity—MidOhio received a \$25,000 grant. Created in 1986, the award is given to an organization that has made a

difference in the betterment of our community.

For more than 25 years, Habitat—MidOhio has been doing more than just pouring concrete and raising walls—it's been changing lives. The nonprofit organization is committed to making the dream of home-ownership a reality for hardworking, lower-income families in central Ohio.

Since 1976, Habitat International has helped build or repair more than 600,000 homes worldwide. The local affiliate launched in 1987 and, thanks to generous support from the community, it celebrated the completion of its 250th home in 2012.

In addition to building and restoring homes, Habitat—MidOhio also runs a successful retail operation. ReStore is a discount home improvement store that sells new and used items. It has two locations open to the public, and the revenue from sales directly offsets the administrative costs for the organization.

"Our approach is a hand up, not a hand out," said E.J. Thomas, CEO of Habitat—MidOhio. "When our families work with us and invest their own sweat equity, they know what it takes to build a home."



Photo by: Eclipse Studios

2012 LEADERSHIP IN PHILANTHROPY AWARD WINNER

Founding Board of the Pickaway
County Community Foundation



The Columbus Foundation and Community Foundations, Inc. proudly honored the remarkable efforts of the founding board of the Pickaway County Community Foundation (PCCF) with the 2012 *Leadership in Philanthropy Award*

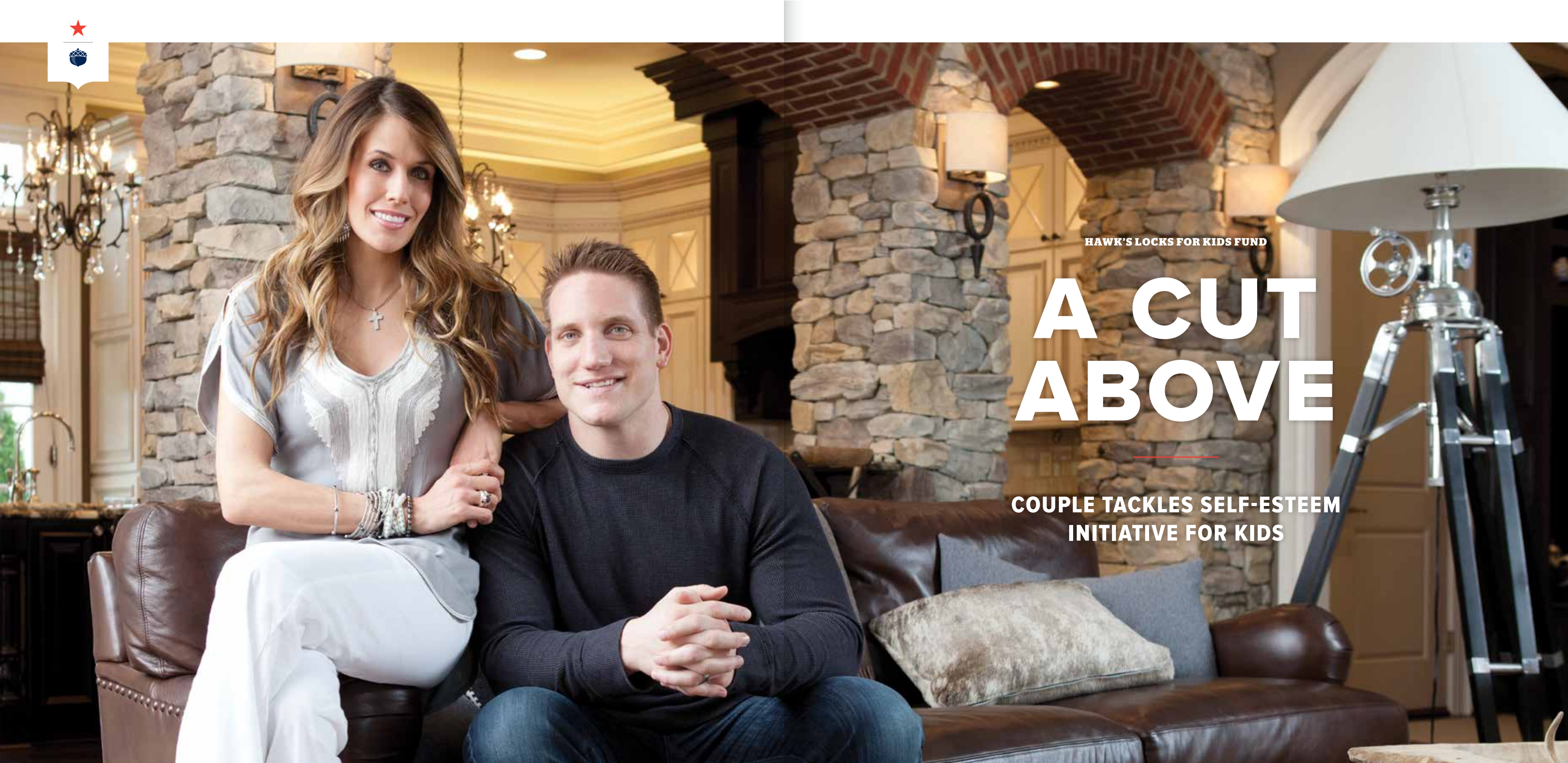
and a grant for \$10,000. Established in 2011, the award recognizes outstanding philanthropic contributions to communities beyond central Ohio.

PCCF was established in 2001 to enable individuals, families, and businesses to invest in the future of the region. A grant from the W.K. Kellogg Foundation allowed a steering committee to begin legal proceedings needed to create the foundation. Since its inception, The Columbus Foundation has managed PCCF's component funds and provided both administrative and investment support to the foundation.

PCCF's first board of directors included **Shirley Bowser**, who served as the first chair, **Mike Estadt**, **Marcia Hall**, **Mike Harrison**, **Mike Logan**, **Glenda Mullet**, **Marti Prince**, **Charles Will**, and **Doris Yamarick**.

"The sky is the limit," said Mrs. Bowser. "I think we've proven this community is charitable and cares deeply about our quality of life here. When we started, we just had one fund. Now there are lots of opportunities to support Pickaway County."

ABOVE: Pictured at Circleville's Mary Virginia Crites Hannan Park are Pickaway County Community Foundation Founding Board Members (l-r) Marcia Hall, Mike Logan, Glenda Mullet, Charles Will, Doris Yamarick, Mike Estadt, and Shirley Bowser.



HAWK'S LOCKS FOR KIDS FUND

A CUT ABOVE

COUPLE TACKLES SELF-ESTEEM INITIATIVE FOR KIDS

WHAT BEGAN AS A GESTURE to honor a fallen soldier has become an inspiring crusade for kids in need.

During his junior year in college, A.J. Hawk, an All-American football player at Ohio State, started growing his hair to honor former professional football player turned soldier Pat Tillman, who was killed in Iraq. When he decided to cut it after eight years, the current Green Bay Packer and his wife, Laura, decided to do more than donate it—they created a vehicle to inspire and support

kids in need.

The *Hawk's Locks for Kids Fund*, a Donor Advised Fund, was established at The Columbus Foundation in 2012 to provide wigs for kids with cancer and other conditions that cause hair loss.

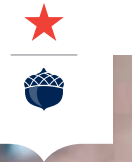
The couple harnessed the power of social media to get the word out. Immediately after A.J. cut his hair, Laura tweeted a message announcing the formation of Hawk's Locks and encouraged others to join in. Last year's

inaugural event raised \$40,000, and the Hawks have partnered with Wigs for Kids to fund custom-fitted wigs that allow kids to run, play sports, and experience all the joys of childhood.

"Until we started our fund, I still didn't realize how big of an impact you can have. Once we started, people came from all over to help—people have been unbelievable. We are definitely very thankful for that and hope to keep growing it every year," A.J. said.

Laura, a native of Dublin, and A.J., who grew up in Centerville, are looking forward to raising their family in central Ohio.

"To me, this community is home," explained Laura. "I feel like we owe it to the people here to serve our community and make an impact and a difference. We want to do all we can to better where we're from and make this a great place for our kids to call home." ★



R.H. DILLON FOUNDATION

NO PLACE LIKE HOME

SUCCESSFUL BUSINESSMAN INVESTS
IN CENTRAL OHIO



GROWING UP IN NEWARK, Ric Dillon remembers Columbus as the “big city”—a destination for special occasions, celebrations, or a visit to the Ohio State Fair.

After graduating from The Ohio State University, his job as an investment executive took him all over the country, but family and business connections kept bringing him back to Columbus. Ric credits a number of serendipitous situations with shaping his life—where opportunity, luck, and talent intersected to create a

positive reaction.

“Over the years, I’ve lived in other places, but I always came back to Columbus. I had the very good fortune to meet and work with the Crane family in the early 1980s, and developed a business relationship and friendship that continues to this day,” Ric said.

Ric returned to Columbus from Washington, D.C. in 2000 for an opportunity to start Diamond Hill Investments, a publicly traded company that offers

investment advisory and fund administration services to clients around the world.

In 2010, he transferred his private foundation to The Columbus Foundation and established the *R.H. Dillon Foundation*, a Donor Advised Fund to support his charitable interests. The Columbus Foundation offered flexibility and ease, and took the administrative burden of running a private foundation away—giving Ric more time to invest in causes close to his heart.

One of his passions is education and, through his fund, he has invested in organizations like Columbus’ I KNOW I CAN and A Call to College in Newark. Both nonprofits promote opportunities for students to pursue higher education.

“I believe education is probably the best explanatory variable to success and happiness in life,” Ric explained. “Therefore, to whatever degree I can help in that regard, I will.” ★

The extraordinary generosity of donors, both past and present, make it possible for the Foundation to develop and support efforts aimed at invigorating and enhancing our community—and providing critical support to those in need.

We are proud to bring your philanthropic spirit to life.



Photo by: Will Shively. Dancers: David Taiye and Courtney Muscroft

Jazz Moves Columbus was a unique collaboration among Jazz Arts Group, BalletMet, and WOSU Public Media.

Celebrating Columbus' Historic Birthday

Grants honor city's past, present, and future

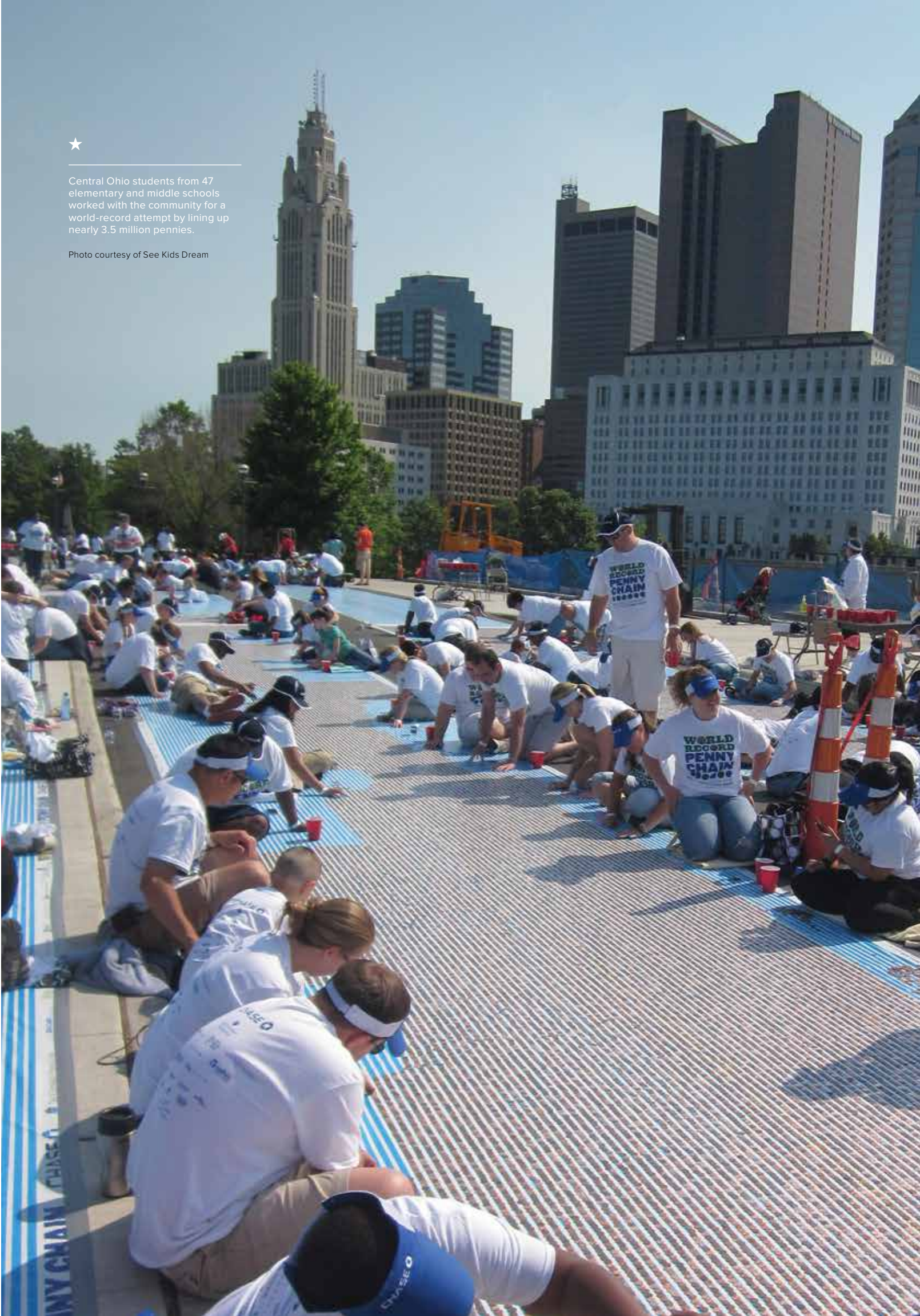
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COLUMBUS WAS THE CITY TO CELEBRATE IN 2012!

In a year filled with special events, programs, and innovative collaborations, our community came together to recognize the bicentennial and honor Columbus' past, present, and future.

In acknowledgement of the bicentennial, The Columbus Foundation awarded nearly \$1.3 million in grants to nonprofit organizations dedicated to making a difference in our community. These grants, ranging from \$5,000 to nearly \$300,000, supported organizations that are poised to positively impact our neighborhoods and residents for years to come.

"We selected organizations that represent an array of interests aimed at strengthening our city," said Lisa S. Courtice, Ph.D., executive vice president for Community Research and Grants Management. "From the arts and the environment to education, health, and wellness, these grants reflect the manner in which we strive to live and improve our community."

See Kids Dream, a local nonprofit organization founded in 2008, integrates community service into education. Its service-learning program, Penny Harvest, helps students gain an understanding of community issues and then work collaboratively to address them. The grant it received, \$265,000 over three years, was awarded to help expand the successful youth philanthropy program to include more elementary and middle schools in central Ohio and support a student-led challenge



Central Ohio students from 47 elementary and middle schools worked with the community for a world-record attempt by lining up nearly 3.5 million pennies.

Photo courtesy of See Kids Dream



Bicentennial Leadership Awards

On February 14, 2012, the official date of Columbus’ bicentennial, The Columbus Foundation’s Governing Committee announced two grants to benefit the people of Columbus and the state of Ohio. The Ohio Benefit Bank and the Columbus Historical Society were named the recipients of the Foundation’s **Bicentennial Leadership Award**. The surprise announcement was made at Celebrating Columbus’ 200 Years, the Foundation’s bicentennial event held in Davis Hall.

\$200,000

GRANT AWARDED TO THE OHIO ASSOCIATION OF
FOODBANKS TO SUPPORT THE OHIO
BENEFIT BANK AND TO BENEFIT PEOPLE
AROUND THE STATE OF OHIO.



“This award was a big surprise and was utilized to help Veterans access and apply for Veterans Education Benefits available through The Ohio Benefit Bank. Each year, millions of dollars in federal education benefits go unclaimed by Ohio Veterans. This grant funded access to these benefits, which has helped connect many Veterans to new opportunities.”

—LISA HAMLER-FUGITT, executive director, Ohio Association of Foodbanks

\$100,000

GRANT AWARDED TO THE COLUMBUS HISTORICAL SOCIETY TO HELP PRESERVE AND PROMOTE COLUMBUS’ HISTORY AND THE SOCIETY’S MOVE TO COSI.



“The Bicentennial Leadership Award enabled us to pay almost half of the cost of construction of our new museum space within the COSI building. This new museum has three times the square footage of our previous location and was designed with leading-edge technology to display artifacts and present historical information in a way previously unavailable. Over 35,000 guests viewed our displays in 2012, a 5,000 percent increase over 2011.”

—JEFF LAFEVER, executive director, Columbus Historical Society

to set the world record for a continuous penny chain of 75 miles.

“The bicentennial grant has been transformational for See Kids Dream,” said Bill Grindle, founder, CEO, and executive director of See Kids Dream. “It enabled us to take a big step forward—more than doubling the number of students we serve by expanding to over 40 schools in central Ohio. This helped us empower more children to achieve their potential and see the power of becoming personally engaged in their community through our service-learning program, Penny Harvest.”

Jazz Moves Columbus was a multimedia performance that included dance, music, and imagery from WOSU’s Columbus Neighborhoods documentary series. A unique collaboration among Jazz Arts Group of Columbus (JAG), BalletMet Columbus, and WOSU Public Media, a \$30,000 grant from The Columbus Foundation provided support to one of the premier events that kicked off the 2012 celebration year.

“This most recent collaboration and the idea to honor Columbus’ bicentennial was suggested by JAG. BalletMet didn’t hesitate to say yes!” explained Cheri Mitchell, executive director of BalletMet. “As we began meetings and discussions about Jazz Moves Columbus, both organizations thought that WOSU would be an excellent partner. This collaboration was comprehensive, fun, challenging, and rewarding. The Columbus arts community is willing to take risks, willing to share, willing to experiment, and willing to work together. Smart and open!” ★

Additional Bicentennial Grants

200COLUMBUS

\$75,000 to support the promotional efforts, events planning, and management needs for the city’s bicentennial celebration.

COLUMBUS DOWNTOWN DEVELOPMENT CORPORATION

\$20,000 to support development of the Bicentennial Pavilion at Columbus Commons.

COMMUNITY RESEARCH PARTNERS (multi-year grant)

\$150,000 to expand DataSource 2.0, a centralized and robust source of data, making information about central Ohio available and easily accessible to all.

CONSIDER BIKING (multi-year grant)

\$295,451 to support development of a Corporate Mode Shift Program to increase the number of persons riding bicycles to work to two percent in Columbus’ bicentennial year 2012.

FINDING TIME: COLUMBUS PUBLIC ART 2012

\$45,000 to Special Improvement District (SID) Public Services Association to support a yearlong program of public art in downtown Columbus featuring temporary site-responsive works by international, national, and local artists.

MID-OHIO REGIONAL PLANNING COMMISSION

\$75,000 to support EcoSummit 2012, an international convening of ecological and environmental scientists, engineers, business leaders, and policymakers.

JAZZ MOVES COLUMBUS

\$30,000 to support a multi-media performance that included dance, music, and imagery from WOSU’s Columbus Neighborhoods documentary series.

SEE KIDS DREAM (multi-year grant)

\$265,000 to expand the successful youth philanthropy program, Penny Harvest, and to support a student-led challenge to set the world record for a continuous penny chain of 75 miles.

STREET CLOCK RESTORATION

\$5,000 to SID Public Services Association to restore two historic street clocks in downtown Columbus as part of the recognition of Columbus’ bicentennial.

WOSU PUBLIC MEDIA

\$20,000 to support the production of Columbus Neighborhoods, a series of hour-long documentaries about Columbus’ historic neighborhoods.

A Special Thanks ★

Each bicentennial grant was made possible thanks to generous Columbus Foundation donors who established a Greatest Needs Fund (Unrestricted) or Field of Interest Fund through a planned gift. These gifts generate ongoing support and create an enduring legacy that will strengthen our community for generations to come.

Robert Bartels Fund

Lois S. and H. Roy Chope Fund

Neva J. Collins Fund

Sarah Helen Craig Fund

Mary Nancy Davis Memorial Fund for Youth Education

William C. and Naoma W. Denison Fund

Ben and Dana Falter Fund

Charlotte R. Haller Fund

Joe and Mary Hoffer Fund

Robert B. Hurst Fund

Joseph A. Jeffrey Endowment Fund

Mr. and Mrs. Derrol R. Johnson Fund

Gertrude E. Kenney Fund

Ruth E. Lang Fund

Frank P. Mader Fund

Richard C. and Nanciann Kaufman Ninde Fund

James W. Overstreet Fund

Public Education Fund

Robert A. Ramsey Fund

Margrett C. Schultz Fund

Alice M. Schumacher Endowment Fund

Martha G. Staub Fund

Roy V. and Eloise F. Thomas Fund

Agnes Marie Trimmer Fund

J. Ray and Lillian W. Waller Fund

Robert F. Werner Fund

Mabel and Vernon Watts Educational Fund



A client at the Broad Street Food Pantry receives fresh broccoli.

Collective Effort Benefits Nonprofits

Strategic aid addresses shift to fresh foods

Executive Director Sue Villilo knows that for some individuals, the meal they receive at Faith Mission’s community soup kitchen is the only food they’ll eat that day. So, she makes sure to work with staff to provide well-balanced, nutritious meals. However, the food system’s recent shift to fresh food has made it challenging to store the fruit and vegetables until she has enough to

feed her large clientele. “Because of the volume of people we serve, we would rarely get enough of one food to do one serving,” Sue explained. “Now that we have the sealer, we can seal it, store it, and when we have enough, we can serve an entire meal with fresh food, which was hard before.” The Columbus Foundation is deeply committed to identifying and

strategically responding to community needs. In 2003, the Foundation introduced *Critical Need Alerts* (CNA)—targeted communications to donors asking them to invest in these pressing needs. Since then, more than \$5.6 million has been raised, with the majority of CNAs further boosted by grants approved by The Columbus Foundation’s Governing Committee and Supporting Foundations to provide matching dollars. From homelessness to the arts, these opportunities were developed with one goal in mind—to strengthen and improve our community. In November 2012, the Foundation launched the **Critical Need Alert for Hunger** in response to the national and local food bank systems’ shift from canned goods to fresh foods. Many local food pantries and soup kitchens faced an immediate challenge of storing these



ORGANIZATION	ITEMS PURCHASED	GOAL	ACTUAL
Broad Street Presbyterian Church	built-in cooler/freezer, electrical upgrades	\$15,790	\$23,849.53
Community Kitchen	vacuum packaging machine, commercial refrigerator repair, 2 refrigerators	\$5,819	\$6,799.53
Faith Mission	refrigerator/freezer, convection oven, range repair, vacuum packaging machine	\$38,369	\$38,369.00
Gladden Community House	walk-in refrigerator	\$15,408	\$15,408.00
Holy Family Church	gas range, pizza oven, refrigerator, freezer, steam tables, kitchen floor resurfaced, shelving, vacuum packaging machine	\$24,942	\$25,242.53
Lutheran Social Services	4 chest freezers, installation of a walk-in cooler and walk-in freezer unit	\$26,201	\$26,201.00
Near Northside Emergency Material Assistance Program (NNEMAP)	commercial freezer	\$2,534	\$6,519.06
St. Stephen’s Community House	2 commercial freezers, 2 commercial refrigerators, shelving	\$13,712	\$14,312.53
The Salvation Army	3 freezers, deep freezer, 3 refrigerators, appliance repair	\$25,327	\$25,327.00
Mid-Ohio Foodbank	expanded cooler space	\$100,000	\$142,984.83
TOTAL:		\$268,102	\$325,013.01



“This Critical Need Alert has dramatically increased our capacity to store and prolong the life of perishable food items in our Westside pantry. This has allowed us to provide more nutritious food to our community, which should result in improved long-term community health.” —BRAD DRAPER, corporate director of food pantry services, Lutheran Social Services of Central Ohio



“The generous response to the Critical Need Alert exceeded our expectations. We are deeply grateful to Columbus Foundation donors for helping us better serve our neighbors in need.” —**KATHY KELLY-LONG**, food pantry manager, Broad Street Food Pantry

\$325,013

RAISED FOR 10 NONPROFITS THROUGH THE CRITICAL NEED ALERT FOR HUNGER

perishable items with their current resources. The CNA provided funding to 10 organizations vital to the community, enabling them to make capital purchases like freezers, vacuum packaging machines, and shelving units to better equip them for the change.

This support was significant to Kathy Kelly-Long, food pantry manager for the Broad Street Food Pantry, multiplying the amount of food she can store—and the clients she can serve as a result. The choice pantry on the Near East Side served more than 23,000 clients in 2012 and saw more than a 100 percent increase in fresh foods served that year—90,000 pounds compared to 42,000 pounds in 2011.

In partnership with the Foundation’s Community Research and Grants Management department, each organization set a goal it hoped to achieve through the

effort to purchase needed items. Foundation donors had the option to support individual organizations or all 10 nonprofits through the *Critical Need Alert for Hunger Fund*, which was distributed across all organizations. Thanks to an extraordinary response, more than \$325,000 was raised, surpassing the overall goal of \$268,102 by nearly \$57,000.



“With the funds, the Broad Street Food Pantry was able to purchase an 8'x14' built-in cooler/freezer unit that almost doubles our cold storage capacity. With this extra space, we can handle larger volumes of fresh produce and dairy, giving our clients healthier options. This new equipment will help us meet the increased demand and increase the nutritional value of the food we serve,” Kathy said. ★

“We hear all of the time about how organized we are and how good the selection is for them. We are indebted to The Columbus Foundation for taking the lead in central Ohio to solve a problem in our food distribution system created by the important move toward more fresh produce!”

—**ROY CLARK**, director, Near Northside Emergency Material Assistance Program



“People are very appreciative of the quality of the food, variety of food, and the amount of food we provide.”

—**SUE VILLILO**, executive director, Faith Mission





Pictured (l-r) Lisa S. Courtice, Ph.D., executive vice president, Community Research and Grants Management, and Columbus Foundation donor Nancy Jeffrey

Right Patient, Right Bed, Right Time

Collaborative vision connects patients with open beds

Longtime Columbus Foundation donor and former Governing Committee member Nancy Jeffrey has been a passionate advocate for the central Ohio mental health community for more than 50 years. Trained as an occupational therapist, Nancy’s first rotation was in a psychiatric hospital in New York.

“I found that I didn’t mind it at all, and it was rather challenging,” she

said. When she married and came to Columbus, her first volunteer job was at Columbus State Hospital. “I realized from that experience in the late 1950s that most of the people I met didn’t need to be there, but were there because there were no community services available to them.”

In recent years, her focus has centered on health systems working

collaboratively to address the growing need for inpatient psychiatric care in central Ohio. In 2008, as the board chair of OSU Harding Hospital, she thought, “This town has the ability to do better. I think most people want to serve this population, but we need to make some plans, because it’s only going to get worse.”

In response to her growing concern, she reached out to Doug Kridler, president and CEO of The Columbus Foundation, and a task force was convened to collectively examine the issue. Facilitated by Lisa S. Courtice, Ph.D., executive vice president for Community Research and Grants Management, the task force was comprised of representatives from Franklin County’s three adult hospital systems—Mount Carmel Health System, OhioHealth, and The Ohio State University Wexner Medical Center—as well as Netcare, the local crisis intervention facility

and Twin Valley Behavioral Health, a state psychiatric hospital. The Central Ohio Hospital Council, an organization that brings community hospitals together to address issues that impact the delivery of healthcare to central Ohioans, also played a key role in the effort. Ohio Hospital for Psychiatry and Dublin Springs, two free-standing psychiatric hospitals, joined the group later in the process.

The task at hand? Finding a way to foster communication and collaboratively tackle a growing surge in psychiatric patients. Working together, this group developed an innovative, web-based “bed board” to keep track of psychiatric patients waiting for an inpatient bed, as well as all open beds in facilities across the area.

In 2009, The Columbus Foundation awarded a \$7,790 grant to the Central Ohio Hospital Council from the *Rebecca J. Wickersham Fund* to help with construction of the online system. A second grant was awarded in 2010 for \$6,157 thanks to the *Nina B. Pohlman Fund*. It supported phase two of the system to improve the analysis of data collected by the hospital systems. In 2012, a third grant for \$9,500 was awarded to help improve the collection of data by the hospital systems serving psychiatric patients from the *Katheryn Hudson Reese Fund*.

“Prior to this initiative, we had patients coming in to all of our emergency departments needing psychiatric care. Sometimes they would be waiting in these emergency departments for four, five, or six days because the volume was so high that we couldn’t locate a bed,” explained Jeff Klingler, president and CEO of the Central Ohio Hospital Council. “Everyone was working individually to place these patients. There was no coordination. By doing it at the

“I love that the group is adapting to the needs of today and the issue is getting the attention that is needed.”
—NANCY JEFFREY



Seated (l-r) Pablo Hernandez, M.D., Netcare; Judy Burkholder, OhioHealth; Mary Hartley, Mount Carmel Health System; Standing (l-r) Jeff Klingler, Central Ohio Hospital Council; Roxanne Jividen, Ohio Hospital for Psychiatry; Gary Long, LISW, OSU Harding Hospital; Karen Woods-Nyce, LISW, CCFC, Twin Valley Behavioral Healthcare; Merissa McKinstry, Dublin Springs; Dallas Erdmann, M.D., OhioHealth

community level, we’ve been able to place patients quicker. Average time now is 18 hours.”

The revolutionary idea behind the electronic bed board initiative was to focus on the entire community, instead of one facility at a time. And though they are competitors, each participant saw this as an opportunity to positively address a community problem.

Every morning, 365 days a year, every provider participates in a morning conference call. Each talks about what the list looks like

that day, what discharge plans are expected, and what patients can move to beds. As a result of this ongoing effort, the wait time for patients in the crisis intervention facility, emergency departments, and medical surgical/intensive care units has reduced significantly.

“I think Columbus by nature is a very collaborative community—not with just this issue, but others as well,” Jeff said. “In this case, it was about getting competitors to put aside those differences to do the right thing.” ★

Each year, The Columbus Foundation welcomes new individuals, families, and businesses into our growing family of donors.

Together, we are building a brighter future for the communities we call home.



FUNDS ESTABLISHED DURING 2012



GREATEST NEEDS FUNDS (UNRESTRICTED)

Donors can address the community’s greatest needs through these funds. Created by visionary philanthropists who want to support the community beyond their own lifetimes, these funds allow the Foundation to address community needs as they emerge.

7	168	\$162,863,983	\$10,000–\$37,357,806
2012 UNRESTRICTED FUNDS	TOTAL UNRESTRICTED FUNDS	MARKET VALUE OF UNRESTRICTED FUNDS (As of December 31, 2012)	MARKET VALUE RANGE

NEWTON A. AND ELEANOR THOMPSON BROKAW UNRESTRICTED



Newton and Eleanor (Margaret) Brokaw were married for 53 years. Margaret, a cat lover, was a supporter of community cat welfare organizations. She was a founding member of the Calligraphy Guild of Columbus and former chair of Art-IX. Margaret passed away in 2012 at the age of 88; Newt passed away in 2008 at the age of 80.

RAYMOND C. DRAKE



Raymond (Ray) Drake, a native of Toledo, was the owner of Central Ohio Concrete Cutting, Inc. of Columbus. A resident of West Jefferson, he was a member of the Harvest Chapel Church and the Central Ohio Anglers and Hunters Club. Ray passed away in 2012 at the age of 55.

BARBARA HARDY UNRESTRICTED

Barbara (Buz) Hardy was an art teacher in Upper Arlington Schools during a 30-year teaching career. She was involved in the OWLS-Older, Wiser, Learners and LifeLong Learning Program in Upper Arlington. She was married to Stanley T. Hardy, who passed away in 1978, and had an adopted daughter. Barbara passed away in 2010.

CATHERINE A. MONRO

Catherine Monro provided for this fund through her estate plan. A member of Brookwood Presbyterian Church, Catherine passed away in 1989 at the age of 83.

BRYAN R. NOTON

Bryan Noton was born in Bath, England, and became a U.S. citizen in 1970. He was an internationally recognized authority on the application of advanced materials, especially composites, to innovative structures such as aircraft, spacecraft, and ships. Bryan’s career in aerospace engineering and research included positions at the Aeronautical Research Institute of Sweden, University of Virginia, Whittaker Corporation in California, Stanford University, and Washington University in St. Louis, before he joined Battelle for the remaining 20 years of his career. He passed away in 2012.

ROBERT N. SHAMANSKY ENDOWMENT

Robert (Bob) Shamansky established this fund through a bequest. Bob was an attorney and partner with Benesch, Friedlander, Coplan & Aronoff. He represented Ohio’s 12th District in the U.S. House of Representatives from 1981–1983. Bob also served on the staff of the Democratic National Committee in 1960 and in the U.S. Army Counterintelligence Corps. He was a graduate of The Ohio State University and Harvard University.

SUSAN WEIL

Susan Weil established this fund with a bequest from her estate. She was married for 40 years to Edwin E. Weil, who passed away in 2006. Mr. Weil worked at Chemical Abstracts for more than 30 years. Susan passed away in 2008.



FIELD OF INTEREST FUNDS

This fund option allows donors to make contributions to specific fields of interest that have meaning to them. This may include support for multiple areas of interest, such as the elderly, healthcare, the arts, or a specific geographic area.

11	205	\$104,463,912	\$10,000–\$9,485,146
2012 FIELD OF INTEREST FUNDS	TOTAL FIELD OF INTEREST FUNDS	MARKET VALUE OF FIELD OF INTEREST FUNDS (As of December 31, 2012)	MARKET VALUE RANGE

ABERCROMBIE & FITCH FUND OF THE NEW ALBANY COMMUNITY FOUNDATION

For more than 100 years, Abercrombie & Fitch has designed and produced the highest quality all-American clothing. This fund will support its philanthropic projects and causes, especially those that benefit teens in the New Albany community.

JODY & JOEL ALTSCHULE ENDOWMENT FUND OF THE NEW ALBANY COMMUNITY FOUNDATION

Joel Altschule is a financial advisor with UBS Financial Services and his wife, Jody, is an active volunteer in the community. The fund will support arts and cultural opportunities in the community, including the Jeanne B. McCoy Community Center for the Arts.

CRITICAL NEED ALERT FOR HUNGER

The Columbus Foundation created this fund to provide an efficient, effective, and immediate way for Foundation donors to respond to the needs of central Ohio choice food pantries and community kitchens. In November 2012, the Foundation issued a Critical Need Alert for Hunger, which raised more than \$325,000 to increase the capacity of storage and refrigeration for fresh fruits and vegetables.

THE HUNTINGTON BANK FUND OF THE NEW ALBANY COMMUNITY FOUNDATION

Huntington Bank established this fund to support health, wellness, safety, and educational initiatives in the New Albany community and its surrounding areas.

JO ANN & SCOTT JOHNSON FAMILY FUND OF THE NEW ALBANY COMMUNITY FOUNDATION

Jo Ann and Scott Johnson are New Albany residents who established this fund to support educational and cultural enrichment in their community, especially lifelong learning and continuing education opportunities.

KREBS FAMILY FUND OF THE NEW ALBANY COMMUNITY FOUNDATION

Ken Krebs is executive vice president and general counsel at RockBridge Capital, LLC. His wife, Jackie, is a board member and an active community volunteer for several initiatives, including the Franklin Park Conservatory Women’s Board, Healthy New Albany, and the New Albany Farmer’s Market. This family fund will support athletic initiatives, including Veterans Field, at New Albany High School, and other organizations and causes.

NA ATHLETIC BOOSTER’S TURF FIELD FUND OF THE NEW ALBANY COMMUNITY FOUNDATION

The New Albany Athletic Booster Club established this fund to support the installation of the turf field in the New Albany High School stadium. The field, dubbed Veterans Field, is named in honor of those who have served and currently serve in our armed forces.

PAUL AND JENNIFER NAUMOFF FAMILY FUND OF THE NEW ALBANY COMMUNITY FOUNDATION

Jennifer and Paul Naumoff and their four children established this fund to support and encourage continued growth and excellence in the New Albany community.

ROSS LEADERSHIP INSTITUTE



The Ross Leadership Institute is named in honor of Richard M. (Dick) and Elizabeth M. (Libby) Ross, two community leaders who have had a major impact on our community in the arts, education, and healthcare. More than a dozen community leaders started the Institute in 2012. By providing focused responses to critical leadership needs, Ross Leadership Institute is dedicated to raising the quality of leadership in business, education, non-profit, and government organizations.

UA ARTS FUND OF THE UPPER ARLINGTON COMMUNITY FOUNDATION

This fund was created to promote all forms of cultural arts in the Upper Arlington community. UA Arts, formerly Friends of the Arts in Upper Arlington, was established in 1992.

WESTERVILLE CITY SCHOOLS INTERNATIONAL BACCALAUREATE



Parents and volunteers established this fund to support the Westerville City Schools International Baccalaureate program, a comprehensive, two-year international curriculum that provides students with the skills and attitudes necessary for success in higher education and employment. The group seeks to raise awareness of the benefits of the program, encourage enrollment, and sustain the program by supplementing district general funds with private funding.



DESIGNATED FUNDS

Donors support specific charitable organizations that they identify to receive grants.

7	275	\$192,396,318	\$10,000–\$28,752,017
2012 DESIGNATED FUNDS	TOTAL DESIGNATED FUNDS	MARKET VALUE OF DESIGNATED FUNDS (As of December 31, 2012)	MARKET VALUE RANGE

NAOMI J. BLODGETT

Naomi Blodgett established this fund through a bequest. She passed away in 2012. A graduate of The Ohio State University with a master of science in home economics, Naomi was a schoolteacher and an educator in business. She was a member of the Clintonville Woman’s Club and the Worthington Presbyterian Church. Naomi was originally from Ashland County.

NEWTON A. AND ELEANOR THOMPSON BROKAW DESIGNATED

Newton (Newt) Brokaw was a graduate of the University of Cincinnati. He retired as president of the Columbus Industrial Association. Newt served many associations and organizations during his life, including the Payors Council of the Franklin County Coalition for Cost Effective Health Services, the Ohio Governor’s Advisory Committee for OSHA and Disabled Persons, and the Columbus-Franklin County Private Industry Council. Eleanor, his wife, passed away in 2012 at the age of 88; Newt passed away in 2008 at the age of 80.

DONNA J. BUCHAN

Donna Buchan provided for this fund through her estate plan. She was an airline stewardess for 36 years with Eastern Airlines. Donna passed away in 2011 at the age of 78.

NORMA E. GRENER

Norma Grener retired from Columbus City Schools in 1975, where she taught many grade levels, and served as the principal at Westgate Elementary School. She traveled extensively, and was a member of the American Association of University Women, Delta Kappa Gamma, and Pi Lambda Theta for more than 50 years. Norma established a Charitable Gift Annuity as well as a planned gift through her will to benefit The Columbus Foundation. She passed away in 2012 at the age of 99.

HOWARD ROSS AND MARY SHANNON MITCHELL

Mary Mitchell and Howard Ross established their planned gift in 1993 through a Charitable Remainder Trust. Mary, a junior high school teacher, volunteered with many organizations including the Pleasure Guild, The Childhood League, Children’s Hospital Twig, and the Columbus Cancer Clinic. She passed away in 2005. Howard, who passed away in 2012, was in a private medical practice for more than 40 years and retired in 1994. He volunteered at the Columbus Medical Association’s free clinic, VoiceCorps Reading Service, and the Bexley Historical Society. Mary and Howard had four children and nine grandchildren.

BEATRICE PEARCE SHEPARD

Longtime Columbus Foundation donor Art Shepard established this fund in memory of Columbus native and first wife, Beatrice. The couple married in 1936 and lived in Newark. Beatrice was a ballet dancer and taught with Jorg Fasting, the Norwegian ballet master formerly of the Ballet Russe de Monte Carlo, who founded Capital City Ballet in Columbus. Art grew up in Cambridge, migrated to Columbus in 1929, and began an extensive career in insurance. He has also included the Foundation in his estate plan. This fund will support BalletMet.

BETTE WALLACH ENDOWMENT



Bette Wallach was born in Columbus, and graduated from East High School and Lake Erie College in Painesville. She was one of the first employees of Lustron Corporation and one of the last to be terminated when the plant closed—25 years later. She was later employed as an executive assistant for Ohio Educational Telecommunications Network. Bette was active with the Women’s Board of the Columbus Museum of Art, The Childhood League, and Columbus Symphony. Bette enjoyed world travel in her later years. She passed away in 2012 at the age of 96.



ORGANIZATION ENDOWMENT FUNDS

Nonprofit organizations and individuals create this type of fund to protect the capital of the organization and help it meet future needs. The fund can provide a relatively constant source of income and demonstrate security and long-term financial planning.

18	277	\$84,914,333	\$10,000–\$6,096,289
2012 ORGANIZATION ENDOWMENT FUNDS	TOTAL ORGANIZATION ENDOWMENT FUNDS	MARKET VALUE OF ORGANIZATION ENDOWMENT FUNDS (As of December 31, 2012)	MARKET VALUE RANGE

ARC OF APPALACHIA–HIGHLANDS NATURE SANCTUARY ENDOWMENT



The Arc’s mission is to preserve, restore, and reunite the greater Appalachian Forest through education, land acquisition, and enduring stewardship— protecting the forest’s magnificent biodiversity, beauty, and balance. Today, the Arc manages 5,000 acres of natural areas in south central Ohio. Since 1995, it has acquired and protected 80 separate parcels of land in 14 preserve regions. Each year, the Arc specializes in offering courses to the public in forest ecology, conservation, and stewardship.

BEXLEY PUBLIC LIBRARY ENDOWMENT



Thanks to the generosity of an anonymous donor, supporters of Bexley Public Library now have the opportunity to make a lasting contribution to the library. The fund will help advance the library’s mission to enlighten, engage, and inspire a community of lifelong learners. Established in 1924, Bexley Public Library serves as a community learning center and gathering place by providing access to resources, programs, and services for children, teens, and adults.

DENISE AND BARRY BLANK TREE FUND OF THE BEXLEY COMMUNITY FOUNDATION

Denise and Barry Blank are longtime residents of Bexley, and supporters of its beautification program. This fund will support tree planting and related educational and community outreach programs in the city of Bexley, in coordination with the Bexley Beautification Fund tree projects.

DOLORES M. BOWER & DOROTHY M. BOWER MEMORIAL FUND FOR THE ALS ASSOCIATION CENTRAL & SOUTHERN OHIO CHAPTER

BUCKEYE TRAIL GREATEST NEEDS



As the leader in building, maintaining, protecting, and promoting Ohio’s State Trail for more than 50 years, the Buckeye Trail Association (BTA) has envisioned and successfully created a one-of-a-kind hiking experience for 1,444 miles around the state for all to enjoy. This fund provides the BTA with the flexibility to continue daily operations, including purchasing materials for trail structures, highlighting Ohio’s Buckeye Trail to visitors and local community members, and managing and supporting our inspiring grass roots volunteer corps.

COLUMBUS PUBLIC ART



This fund was established with the assistance of the Capital Crossroads Special Improvement District to support *Finding Time: Columbus Public Art 2012*. Contributions supported Finding Time and will be used for future public art projects in the city.

CONWAY CENTER FOR FAMILY BUSINESS



The Conway Center for Family Business is a nonprofit organization celebrating its 15th anniversary. The center provides peer groups, educational resources, and programs to help family business members continue to be successful and transition their businesses to the next generation. Founded by Dick Emens and Bea Wolper, partners in the law firm of Emens & Wolper, the center serves more than 10,000 central Ohio employees.

**RON AND JANICE COOK FUND
FOR EARLY MUSIC**

Established in 1980, “Early Music in Columbus” is a concert series dedicated to the music of the Middle Ages, Renaissance, and Baroque. Ron Cook and his wife, Janice, are members of the performing ensemble, The Early Interval. Each year “Early Music in Columbus” presents a series of concerts featuring the finest national and international artists who specialize in the music of these periods.

**NORTH COMMUNITY EVANGELICAL
LUTHERAN CHURCH TRUST**

North Community Evangelical Lutheran Church was established in 1947. Over the years, the church has been a broad supporter of community programs, sponsoring more than three dozen refugees, and working with Faith Mission, Habitat for Humanity, American Red Cross Blood Drive, and Clintonville Resource Center. The fund will continue its efforts.

FRIENDS OF OHIO HISTORY

The mission of the Ohio Historical Society is to spark discovery of Ohio history and help people connect with Ohio’s past to understand the present and create a better future. The organization protects Ohio’s treasured historical sites and irreplaceable artifacts, provides inspiration to the next generation of history lovers by supporting history education, shares Ohio’s stories through innovative exhibits, and maintains one of the finest historical repositories of its kind in its archives/library. This endowment fund will help preserve, promote, and teach Ohio history.

**JACK AND BETTY ANNE JEFFREY
SCHOLARSHIP FUND OF THE
WORTHINGTON CHRISTIAN SCHOOLS
FOUNDATION**

**LILLIAN A. ST. CLAIR FUND OF THE
WORTHINGTON CHRISTIAN SCHOOLS
FOUNDATION**

**WARRIOR FUND FOR FACILITIES
OF THE WORTHINGTON CHRISTIAN
SCHOOLS FOUNDATION**

Worthington Christian Schools (WCS), a K–12 college preparatory school, was founded in 1973. Today, WCS has evolved into a three-campus school, recognized nationally for academics, athletics, and the arts. Worthington Christian Schools Foundation established three funds to provide scholarships to current students for the WCS’s Senior Missions Trip; for WCS operation expenses; and to maintain buildings and improvement of its facilities. Its mission is to develop Christ-minded students as they engage in the intellectual, creative, and physical pursuit of truth.

MOTTS MILITARY MUSEUM, INC.



Motts Military Museum was founded in 1987 by Warren E. Motts of Groveport. Its mission is

to educate the public on the importance of America’s military past through the documentation, collection, interpretation, and preservation of tangible artifacts and personal stories of the men and women who served and are serving in the United States Armed Forces.

SECULAR STUDENT ALLIANCE



The Secular Student Alliance is a national umbrella organization working tirelessly to create a future

in which secular students are respected voices and vital partners in the secular movement’s advancement of critical thinking and rationality.

**STRATFORD ECOLOGICAL
CENTER, EDUCATIONAL FARM,
AND NATURE PRESERVE**



Stratford Ecological Center is a nonprofit educational organic farm and nature preserve on 236 acres in

Delaware County. The center is dedicated to the education of children and adults in understanding relationships between living things and their environment. Visitors can explore nature trails, gardens, greenhouses, and the livestock and farm operation. Stratford also offers workshops, classes, tours, and in-season farm products for sale.

**YOUTH AND RECREATION FUND
OF THE BEXLEY COMMUNITY
FOUNDATION**



This fund will support unique recreational programs, projects, activities, and facilities that

benefit the Bexley community.



SCHOLARSHIP FUNDS

This fund type is used by donors to help students achieve their educational goals through scholarships or awards. Donors are involved by defining candidate eligibility, selection, and award use.

6

2012 SCHOLARSHIP FUNDS

201

TOTAL SCHOLARSHIP FUNDS

\$54,524,804

MARKET VALUE OF SCHOLARSHIP FUNDS (As of December 31, 2012)

\$10,000–\$24,616,124

MARKET VALUE RANGE

**RYAN ANDREW BEAVERS
MEMORIAL SCHOLARSHIP**

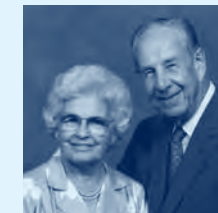


Ryan Beavers, a 2009 Hilliard Davidson High School graduate, was active in soccer, band, and computer

science. He was a junior at the University of Illinois studying computer science when he passed away suddenly in 2012. Ryan, an incredibly positive young man, made new friends easily and cherished old ones, strived for excellence, and embraced difficult tasks. As an organ donor, Ryan’s life continues to touch many lives. This scholarship fund will help Hilliard Davidson students studying music education or computer science achieve their dreams.

**RHONDA BOGUE DODRILL
EDUCATIONAL SCHOLARSHIP**

**MARGARET L. AND PAIGE D.
MYERS SCHOLARSHIP**



John and Suzanne Smucker established this fund to honor Suzanne’s parents. It will

provide scholarships for students from Medina County. The Smuckers have two additional scholarship funds with the Foundation that were established in 1989 and 1992. John and Suzanne reside in Manchester, Michigan.

C. HENRY AND NAOMI B. PETERSON

Clarence Henry (Hank) Peterson was born, raised, and worked as a mechanic and ranch hand in San Luis Valley, Colorado. After teaching mechanics in Georgia and serving in Austria during World War II, Hank earned a mechanical engineering degree from the University of Colorado in Boulder. He met and married Naomi and relocated to Columbus, where he became a patent agent. He was a member of Covenant Presbyterian Church and the Northwest Garden Club. Naomi predeceased Hank, who passed away in 2010. This fund will provide scholarships for those who would be unable to begin or continue their college education.

ROSENBERRY FAMILY SCHOLARSHIP

St. Joseph Montessori School primary teacher Kathy Koehler, and former teacher Michelle Getz, established this fund to provide tuition assistance for families experiencing financial hardships due to a life-threatening illness or life-altering condition. The motivation began with battles of cancer experienced by Brenda Rosenberry and her daughter, Jill, who is in remission. Brenda passed away in 2011.

HELEN MARIE WICKHAM

Helen Wickham established this fund through her estate plan, which will provide scholarships to graduates of Columbus East High School. She was a graduate of Columbus East High School and Bliss College. Helen, predeceased by her husband, Gerald J. “Wick” Wickham, passed away in July 2011.



DONOR ADVISED FUNDS

Flexible and convenient, this is the number one fund choice for many donors. With Donor Advised Funds, the donor receives an immediate tax deduction when they establish the fund, but can take their time in selecting the charities to receive grants from the fund.

85

2012 DONOR ADVISED FUNDS

736

TOTAL DONOR ADVISED FUNDS

\$426,557,172

MARKET VALUE OF DONOR ADVISED FUNDS
(As of December 31, 2012)

\$10,000–\$122,057,390

MARKET VALUE RANGE

ANASIS FAMILY



George and Jan Anasis established this fund to expand their charitable interests both locally and internationally. They hope to create an opportunity for their children and future generations to experience the power of positive impact. George is the president and CEO of Skyclimber LLC in Delaware. The couple has four children and resides in New Albany.

GEORGE BARRETT AND DEBORAH NEIMETH

George Barrett grew up in Connecticut and is the chairman and CEO of Cardinal Health. His wife, Debbie Neimeth, is the owner of Happy Go Lucky, a lifestyle store featuring custom furniture, home décor, gifts, and jewelry. The couple has three children and lives in German Village.

BEELER FAMILY



Jack Beeler is an attorney and partner at Porter Wright Morris & Arthur LLP, maintaining a general

corporate practice with an emphasis on international business transactions and affordable housing. Currently employed by The Ohio State Wexner Medical Center, his wife, Pam, has a career in public health and school health, which spans nearly 35 years. The couple

has two sons—Adam, and Nathaniel, who is married to Eve and has a son, Max. The family resides in Bexley. Their fund will support the arts, education, and other community organizations in which family members are actively involved.

WILLIAM P. BLAIR, III FOUNDATION



William (Bill) Blair and business partner, William Joseph, started the lobbying organization Ohio Citizens for the

Arts, in 1976. A graduate of The Ohio State University Moritz College of Law, Bill is a passionate advocate and ambassador for OSU. For more than 40 years, he has represented Ohio's arts and public broadcasting organizations and many other nonprofit interests, including state and federal government. Bill supports social services, education, healthcare, and the environment, serving on many civic and nonprofit boards locally, regionally, and nationally.

BLOM FAMILY

David Blom, a graduate of The Ohio State University and George Washington University, is president and CEO of OhioHealth. He is a member of the Governing Committee of The Columbus Foundation. David and his wife, Kris, live in Westerville, and their three adult daughters also live in central Ohio.

BOB EVANS FARMS FOUNDATION



Bob Evans Farms started in 1948 when Bob Evans began making sausage in Gallipolis. Today, there are nearly

600 full-service restaurants, as well as a complete line of retail food products. Bob Evans Farms established this fund to support the company's charitable goals.

BOORD-WYATT FAMILY

BOYD W. BOWDEN, D.O., COMMUNITY GARDEN AWARD



Boyd W. Bowden, D.O., was a highly respected orthopedic surgeon, mentor, and teacher. He served the health

needs of the community for more than three decades. Dr. Bowden was devoted to his family and community, and was passionate about gardening and wellness. The Osteopathic Heritage Foundation, in collaboration with the Bowden family, established this fund in memory of Dr. Bowden, who served as a foundation director. The Bowden Award supports Franklin Park Conservatory's Growing to Green Program and community gardeners who are making a positive impact in their communities.

MARGARET BROWN MEMORIAL

Karen Clancy created this fund in memory of her mother, Margaret Brown, who was passionate about helping those less fortunate. Honoring Margaret's 11 years of volunteer work in Gahanna Schools, the fund will support a variety of purposes, including scholarships for elementary school students to attend a summer science camp and clothes and school supplies for high school students in need.

BURGDOERFER FAMILY

Stuart Burgdoerfer is executive vice president and chief financial officer at Limited Brands. A graduate of Indiana University and The Kellogg Graduate School of Management at Northwestern University, he serves on the boards of Progressive Insurance Corporation and KIPP (Knowledge Is Power Program) of Central Ohio, and is involved in a number of other community and charitable activities. Laney, his wife, has finance and accounting degrees from the University of Oklahoma. Previously employed by Bank of America as a vice president in corporate and private banking, she is an active community volunteer with many organizations including the Columbus Metropolitan Library, the board of Celebration of Learning, The Homeless Families Foundation, and is an elder at New Albany Presbyterian Church. Stuart and Laney are the parents of three children and reside in New Albany.

CRAMER & ASSOCIATES FOUNDATION

Michelle Cramer, CFRE, is president and CEO of Cramer & Associates, a consulting firm specializing in

nonprofit fundraising and management. The firm assists philanthropic organizations by conducting feasibility studies; assessments; capital, endowment, and major gift campaigns; and other services. The fund will be used to support a key corporate tenet of the firm, giving

back to the nonprofit sector, and will support a variety of nonprofit organizations in its fundraising efforts.

SHELIA SMITH DAVIS FAMILY

Formerly a New Albany resident, Shelia Smith Davis now lives in Naples, Florida. She transferred charitable assets from the Community Foundation of Collier County to establish this fund.

STEVEN AND LYNDA MARIA DAVIS FAMILY

Steven Davis, chairman and CEO of Bob Evans Farms, holds a bachelor's degree from the University of Wisconsin and an MBA from the University of Chicago. Lynnda Maria has a bachelor's degree from the University of Illinois and an MBA from Northwestern University. The couple has chosen to focus their giving on healthcare, particularly diabetes, behavioral health, and cancer; education and learning; and specific arts organizations. Steve and Lynnda Maria have lived in the Columbus area since 2005 and have three daughters.

TOM AND LYNN DAVISON

Tom Davison is a senior financial advisor with Summit Financial Strategies, Inc. He is a graduate of Duke University, and holds a doctorate from The Ohio State University. Lynn recently retired as vice president of Information Management at Battelle Memorial Institute. She has degrees from Duke University and The Ohio State University. Tom and Lynn live in Worthington.

MELANIE AND MIKE DEASCENTIS FAMILY

Mike DeAscentis is the founder and CEO of Lifestyle Communities, a real estate development company. He and his wife, Melanie, have three children—Madelyn, Mike, and Mara—and reside in New Albany.

DELAY THE DISEASE FOUNDATION

David Zid is owner and president of Columbus Health Works, a personal training company he started in

1999. As an energetic coach, he has developed a special interest in the older adult client. Currently, he donates his time as the creator and leader of group exercise classes specifically designed for people with Parkinson's disease. He is the author of two books and two videos on the same subject. He will utilize this fund to support education and programs of exercise for Parkinson's patients, caregivers, and medical professionals. This fund was established with a generous gift from Millard Cummins.

ELFORD FOUNDATION

Elford, Inc. is the oldest and largest locally owned commercial construction company in

central Ohio. Edward (Pop) Elford, an English immigrant, founded the company in 1910. Honest service and integrity are the same values carried on by his son, Harold (Fat) Elford, and daughter-in-law, Mary Elford. After Harold's death, Mary was the first woman to run a construction company in Ohio. Tom (T.C.) Fitzpatrick, who began with Elford as a water boy and rose to become paymaster, general superintendent, and finally CEO and chairman, also carried on these same values.

ELKS' THEATRE ENDOWMENT

FORSYTHE FAMILY

Robert and Linda Forsythe are residents of Dublin. Robert is a pediatric allergist and immunologist at Riverside Pediatrics Associates. Linda is a nurse anesthetist.

MARCIA G. GOLDBERGER

JANE GRIFFIN MEMORIAL VOCAL SCHOLARSHIP

Jane Griffin was the director of vocal music at Worthingway Middle School, as well as the director of the Capriccio Youth Choir, and director of music at Mountview Baptist Church in Upper Arlington. Jane's husband, Larry, resides in Worthington. This fund will support the Capriccio Vocal Ensemble. Jane passed away in 2011.

SANDRA HARBRECHT RATCHFORD



Sandra Harbrecht Ratchford is president of Paul Werth Associates, a full-service communications

firm specializing in public relations, advertising, public affairs, research, and digital marketing. Sandra serves on numerous corporate and nonprofit boards, including Motorists Mutual Insurance Company, The Davey Tree Expert Company, The Columbus Club, Experience Columbus, and The Ohio State University Fisher College of Business Dean's Advisory Council. Sandra and her husband, Robin, reside in New Albany.

JOHN AND AGGIE HASLUP FAMILY

John Haslup is a consultant and Aggie is vice president for marketing with Health Care Dataworks, Inc. They reside in Worthington.

HENRY HAUSER FAMILY



Henry Hauser is senior vice president for investments at UBS Financial Services, Inc., and serves on the board of Dawes Arboretum and Columbus Academy. A graduate of Connecticut College, Henry has a daughter and a son and lives in Columbus.

HAWK'S LOCKS FOR KIDS

A.J. and Laura Hawk established this fund, with additional contributions from friends, to support children dealing with cancer by providing wigs for them during and after treatment. A.J. is a former Ohio State football standout who currently plays for the Green Bay Packers. The Hawks reside in Dublin and Oneida, Wisconsin.

HEART HOPE FOUNDATION



HOELSCHER FAMILY CHARITABLE



Lee and Sue Hoelscher live in Westerville along with their two children, Nicholas and Emily. Lee is employed by Navigator Management Partners, LLC, a business and technology consulting firm. He is also the endowment committee chair for Peace Lutheran Church in Gahanna. Sue works for HMB, a technology consulting firm, and previously worked for the tax, assurance, and consulting firm of McGladrey, LLP. She is also involved with their children's elementary school activities in Westerville. Lee and Sue established this fund to support their family's philanthropy and plan to encourage their children's interest in philanthropic efforts as they get older by including them in grant decisions.

HONOR RIDE OHIO



Todd Reigle is the director of marketing at Goodwill Columbus. Outside of the office, he is active in many Veteran-related activities, including flying World War II Veterans to Washington, D.C., with Honor Flight Columbus. He also organizes an annual bicycle ride,

Honor Ride Ohio, across the state of Ohio raising funds for multiple Veterans' groups. This fund will facilitate his passion to support Ohio Veterans.

HOOPER FAMILY FOUNDATION

Samuel J. Hooper III and his wife, Michelle R. Holdgreve, are residents of Columbus. Sam is an equity trader at Diamond Hill Investments. Michelle is the government relations director at the Ohio Veterinary Medical Association. The couple's fund, established to support education and other community-based charitable interests, will also foster the importance of community and giving with their son, Henry, as he grows and participates in charitable decisions.

HUMMINGBIRD

Jim and Christina Grote have two sons and two daughters and reside in Columbus. Jim founded Donato's Pizza on Columbus' South Side in 1963. They plan to support projects for the South Side, as well as other charitable interests.

HUMPHRYS FAMILY

Scott Humphrys is a retired U.S. Army officer and an owner of Mission Essential Personnel (MEP). MEP is the U.S. government's leading provider of translators, interpreters, and cultural advisors. Scott and Kerstin, his wife, live in Upper Arlington.

JACK REES

Friends of Jack Rees collaborated to establish this fund in his honor. Jack was a graduate of Otterbein University, an avid golfer, and a member of the Ohio Fast Pitch Softball Hall of Fame. He was married to Verna Rees for 66 years when she passed away in 2013. Jack also passed away in 2013. They have three children. This fund will assist softball and golf programs by providing facilities, instruction, and opportunities for underprivileged kids to participate.

JENI'S SPLENDID ICE CREAMS TRUST



Created in 2012 for the company's 10-year anniversary with a \$10,000 gift and the company's commitment to fund the trust with the same or larger donations in each of the next 10 years, the trust will be used to hold funds for disbursement after the trust has grown in size and can meaningfully impact important community efforts. The trust is designed as an extra thank you to the community beyond the company's normal charitable donations.

JEREMIAH 29

Jeffrey Gibbs, DDS, is a graduate of The Ohio State University and a dentist with the Camelot Dental Group in Columbus. He serves on the board of C.R.A.C.K. House Ministries, a ministry that focuses on the treatment and victory over crack addiction. Dr. Gibbs and his family have participated in numerous medical mission trips to Central America and South America. He and his wife, Carol, have three sons and reside in Upper Arlington.

BILL AND TRISHA JORDAN FOUNDATION

Bill and Trisha Jordan are residents of Blacklick. Bill received his law degree from George Washington University and is executive vice president at DSW, Inc. Trisha is associate pharmacy director, University Hospitals, at The Ohio State University. They have three children.

KELLY KELLEHER

KELLEY – 878

KIDS HERE AND THERE

Hannah Wexner established this fund to support kids both "here" in central Ohio and "there" in Africa.

MICHAEL S. AND JUDITH P. KRASNOFF

Michael Krasnoff recently retired from The Ohio State University. He was previously employed in the finance office of R.G. Barry for more than 30 years. Judith retired from a long career as a librarian with BakerHostetler and previously with Grandview Heights Public Library. Both graduates of The Ohio State University, they are active community volunteers with many organizations, including the Ohio Historical Society. Judy is also a graduate of Northwestern University. The Krasnoffs reside in Bexley.

JOHN N. AND BEVERLY A. KRATZ FAMILY FOUNDATION



John Kratz is president and former CEO of Information Control Corporation (ICC), one of Ohio's largest, privately held information technology services firms. He has actively promoted and implemented information technology in central Ohio for many years through his involvement in several professional, civic, and nonprofit organizations. As an alumnus of Heidelberg University, John is an active member of the board of trustees. He and his wife, Beverly, have been residents of Columbus for 30 years. They have two sons, both of whom reside in the Cincinnati area, and four grandchildren. This fund will support education resources and financial assistance for students with an emphasis in science, technology, engineering, and mathematics (STEM).

JAMES LAURINAITIS

James Laurinaitis is a linebacker for the St. Louis Rams of the National Football League. While attending The Ohio State University, he received numerous awards, including three-time consensus All-American and Big Ten Defensive Player of the Year. He resides in St. Louis and Dublin with his wife, Shelly.

RICHARD AND GLENNA LEGRAND CHARITABLE

Richard (Dick) LeGrand established this fund to support charitable interests in Columbus and Jackson. Dick's wife, Glenna, a retired teacher, passed away in 2010. Dick, who is retired from Oak Hill Banks, resides in Jackson. Dick and Glenna established a planned gift through The Columbus Foundation in 1996.

LLOYD AND SHORT HALF CENTURY

Joan Lloyd and Beth Short have been close friends since childhood and grew up in Marion. They were raised with an appreciation for how the charitable sector adds to the quality of life for all. Joan, who lives in German Village, and Beth, who resides in Grandview, established this fund in honor of their birthdays as a way to pay forward for the many blessings their families have received from the contributions of countless nonprofit organizations.

KEVIN AND CINDY MCDERMOTT

Kevin McDermott is a partner in the Columbus office of Barnes & Thornburg, and a member of the firm's Litigation Department. He is a graduate of Miami University and The Ohio State University Moritz College of Law. Cindy is a healthcare consultant with Willis, a national insurance intermediary company. Cindy and Kevin reside in Upper Arlington.

MEDICAL MUTUAL COMMUNITY INVESTMENT

The Community Investment Fund is the second fund Medical Mutual has opened with The Columbus Foundation. This fund is the company's primary source for charitable contributions in central Ohio. The first fund, opened in 2008, is a Field of Interest Fund, whose specific charter is to support health and wellness initiatives for Franklin County youth. Medical Mutual is the oldest and largest health insurance company headquartered in Ohio,



and one of the first in the country, having been established in 1934.

MGF TOUCH FOUNDATION

MGF Sourcing's primary focus is to volunteer within organizations internationally that serve women and children in the prevention and elimination of human trafficking and slavery. This fund will support empowerment, health and welfare, education, prevention, and assistance relating to these efforts.

JOHN T. MOUNT FAMILY FOUNDATION

John Mount served as a member of The Columbus Foundation's Governing Committee from 1963–1972. Beginning in 1960, he held four different vice presidency positions at The Ohio State University—for the university, for educational services, for student life, and for regional campuses. John retired in 1983, but still volunteers as senior volunteer associate for university advancement, and holds the titles of professor, dean, and vice president emeritus for regional campuses. He and his late wife, Bertha, had one daughter, Marilyn, who passed away, and three sons, Thomas, John, and Donald. John resides in Dublin.

MUCHNICKI FAMILY



E. Dennis Muchnicki established this fund in memory of his wife, Carol, who passed away in August 2011 from pancreatic cancer. Dennis is an attorney in Dublin whose specialty is immigration law.

JANE AND PETER MYKRANTZ



LIONEL AND DENISE NOWELL FAMILY FOUNDATION



Lionel and Denise Nowell reside in Cos Cob, Connecticut, and established their foundation to

enhance the lives of underprivileged children by supporting organizations that emphasize educational and economic empowerment. Author of the self-help book *You Are Better Than Your Best* and a graduate of The Ohio State University, Lionel serves on the board of directors of America Electric Power, Bank of America, Reynolds American, and the OSU Fisher College of Business. The couple has four adult children and five grandchildren.

KRISTA AND BRET PARRISH

Bret Parrish is the managing director of Private Client Group for Johnson Investment Counsel. Bret, his wife, Krista, and their children, Paige and Andrew, live in Hamilton.

JAMES M. REDMAN

Having devoted his entire life to farming in Logan County, James (Jim) Redman created this fund to encourage young people to pursue farming as a career. Jim and his wife, Susie, live in Huntsville.

ANN RICHENS MEMORIAL SCHOLARSHIP



Ann Richens was an Irish dance teacher who made an immeasurable contribution to the Irish culture in the Columbus area by establishing Columbus' first Academy of Irish Dance. Among the thousands of students that Ann taught over the years, numerous students have gone on to become national and world champions, professional Irish dancers, and/or Irish dance teachers. Ann passed away in 2011. This fund will provide scholarships for Irish dance students.

ROUND IT UP AMERICA® RUSTY BUCKET



Founded by leaders in the restaurant industry, Round It Up America® was formed to effect change across the United States through charitable giving. Participating in this initiative, the Rusty Bucket Restaurant and Tavern established this fund to have a direct philanthropic impact on the communities in which they do business. Rusty Bucket's guests have the opportunity to round up their purchases to the nearest dollar, allowing for small, potentially frequent giving.

JIM AND MOLLY RYAN FAMILY

Jim Ryan, a graduate of the University of Virginia and Capital University School of Law, founded First Ohio Planning, LLC in 1979. His wife, Molly, is a graduate of the University of Cincinnati. The couple has been involved with TWIG, Nationwide Children's Hospital boards, League Against Child Abuse, and The Childhood League, as well as many other organizations. Jim and Molly have a son and daughter and live in Bexley.

CARLA SOKOL DONOR



Carla Sokol is an experienced triathlete and owner of Events Plus Racing. Her philanthropic interests include support for the arts, environment, and healthcare.

JOHN S. AND ELIZABETH SOKOL FAMILY FOUNDATION



John Sokol is the chairman, CEO, and president of the Ohio Indemnity Company and is a member of the Young Presidents' Organization. He is a former board member of the Central Ohio Transit Authority and Recreation Unlimited. Elizabeth (Liz) was formerly employed as an attorney with Vorys, Sater, Seymour and Pease and with the Ohio Petroleum Marketing Association. She volunteers for the Up On the Roof event for The James Cancer Hospital. Together, John and Liz support Pelotonia, the I Know I Can Founders' Scholarship, Nationwide Children's Hospital, Big Brothers Big Sisters, The Ohio State University, Denison University, Vanderbilt University, The University of Virginia, The College of William and Mary, Columbus School for Girls, and The Wellington School. John and Liz live in Upper Arlington and have two daughters and one son.

JUDI AND JIM STILLWELL LEGACY



Judi and Jim Stillwell created this fund to further the "Spirit of Columbus" and to support organizations and projects in the arts; address hunger in our community; benefit youth and empower women and girls; and focus on neurofibromatosis research/treatment, easing the lives of those affected by the disease.

THOMAS E. STIVISON RESEARCH



Thomas (Tom) Stivison was president of the Columbus Equipment Company where he worked for 41 years. His business associates, family, and friends established this fund in his memory. Tom and his

wife, Sandra (Cookie), are the parents of one son and three daughters and have twelve grandchildren. This fund will help research for Creutzfeldt-Jakob Disease, a rare neurological disease that ultimately cut Tom's life short.

ALFRED AND MARY ANN STOCKUM



Alfred Stockum, M.D., a graduate of The Ohio State University (OSU) College of Medicine and a radiologist at OSU for 31 years, was named associate professor emeritus at retirement. Mary Ann retired from OSU hospitals as a registered nurse and diabetes clinical specialist. She volunteered with the Ohio School for the Blind marching band as a march coordinator. Alfred passed away in 2013.

SHAUN STONEROOK FOUNDATION

MATT TURNEY



Matt Turney attends Southern Methodist University in Dallas and is a member of the Sigma Alpha Epsilon social fraternity. He is a graduate of Columbus Academy. His parents, Sharen and Charles, reside in New Albany. A friend of Matt's established this fund to support Matt's charitable interests.

TWIN RIVERS CHAPTER OF THE LINKS INCORPORATED JEANNE L. BOWEN AND ELEANOR DELOACHE BROWN SCHOLARSHIP

Twin Rivers Chapter of the Links, Incorporated is an organization of women of African descent linked in friendship and committed to improving their lives and the lives of others. These women collaborate with community organizations to develop programs and sponsor projects in the arts, social services, health improvement, and education.

WELLS FAMILY

William (Bill) and Jackie Wells established this fund to continue their generous community giving. Bill and Jackie are trustees of the *William H. Davis, Dorothy M. Davis and William C. Davis Foundation*, a Supporting Foundation of The Columbus Foundation. Jackie and Bill are residents of Galena.

WILLIAMS FAMILY

James K. (J.K.) Williams, III and Shirley Williams reside in Blacklick. J.K. works with his father, James Kirk Williams, Jr., at Kirk Williams Company, Inc., a mechanical contractor, specialty fabricator, and mechanical services company. Their fund is intended to support the family's philanthropic interests.

EDWARD AND ELLEN YEN FAMILY

Edward (Ed) Yen has been a financial advisor since 1979. He is a graduate of the University of Minnesota and a member of The Columbus Foundation's Professional Council. Ed is an active community volunteer and serves on the board of Columbus College of Art and Design. Ellen is also an active community volunteer serving on the Women's Board of the Franklin Park Conservatory and as a member of the Little Garden Club, as well as other organizations. Their fund may support the arts and women's, children's, and environmental causes in the central Ohio community and elsewhere. Ed and Ellen have three children and live in New Albany.



COMMUNITY FOUNDATIONS, INC.

Community Foundations, Inc., a statewide affiliate, was established in 1987 to enable donors to support nonprofit organizations primarily in the state of Ohio and beyond the central Ohio region.

8	136	\$54,608,640	\$10,000–\$15,725,411
2012 COMMUNITY FOUNDATIONS, INC. FUNDS	TOTAL COMMUNITY FOUNDATIONS, INC. FUNDS	MARKET VALUE OF COMMUNITY FOUNDATIONS, INC. FUNDS (As of December 31, 2012)	MARKET VALUE RANGE

ORGANIZATION ENDOWMENT FUNDS

ALERIS FUND OF THE TEAYS VALLEY EDUCATIONAL FOUNDATION OF THE PICKAWAY COUNTY COMMUNITY FOUNDATION



Aleris Rolled Products Inc. is an aluminum fabricating company located near Teays Valley High School in

Pickaway County. The company recently completed a large expansion and received a tax abatement. The fund was established to support the school district over the next 10 years.

UNRESTRICTED FUND OF THE BERGER HEALTH FOUNDATION OF THE PICKAWAY COUNTY COMMUNITY FOUNDATION



The Berger Health System is the largest health system in Pickaway County. The Berger Health

Foundation, through the Pickaway County Community Foundation, established this fund to support the community's pressing health and wellness needs.

FINDLAY ROTARY FOUNDATION, INC.

The Rotary Club of Findlay was founded in 1920 through the untiring efforts of Bill Houck, manager of the Boss Glove Mfg. Co. This fund will support a charitable gift annuity program and its philanthropic work in the community.

KIWANIS CLUB OF ASHVILLE HOWARD HOSLER SCHOLARSHIP FUND OF THE TEAYS VALLEY EDUCATIONAL FOUNDATION OF THE PICKAWAY COUNTY COMMUNITY FOUNDATION



Howard Hosler was a charter member of the Kiwanis Club of Ashville. The Kiwanis Club established this

fund to honor him.

PICKAWAY HELPS FUND OF THE PICKAWAY COUNTY COMMUNITY FOUNDATION



Pickaway HELPS (Higher Education Learning Partners for Students) is a countywide college access program working to make education beyond high school possible for all residents of Pickaway County. The initiative is a collaboration among the Pickaway County Board of Commissioners, all four county school districts, and the Ohio College Access Network. Services include early awareness of the benefits of higher education; exploration of career and education choices; one-on-one assistance with college planning and the financial aid process, including award of "first generation" scholarships; and any related support needed to remove barriers to higher education.

FIELD OF INTEREST FUNDS

ELLEN NORTH DUNLAP FELLOWSHIP FUND OF THE PICKAWAY COUNTY COMMUNITY FOUNDATION

Shirley Dunlap Bowser established this fund with the Pickaway County Community Foundation in honor of her late mother, Ellen North Dunlap. The fund will support the Ellen North Dunlap Fellowship Endowment of the Mortar Board National Foundation, an honor society that promotes the ideals of scholarship, leadership, and service, and encourages lifelong contributions to the global community. It began as the first-ever national organization honoring senior college women. Ellen was a dedicated member since her college days, and was later joined by a daughter and a granddaughter as Mortar Board members.

SAVINGS BANK FUND OF THE PICKAWAY COUNTY COMMUNITY FOUNDATION



The Savings Bank established this fund in honor of its 100th anniversary. Stephen Gary, president and CEO of the bank, is a community leader and a longtime supporter of the Pickaway County Community Foundation.

DESIGNATED FUNDS

DOROTHY UPDYKE AND ELSIE M. UPDYKE

A graduate of The Ohio State University with bachelor's and master's degrees, Elsie Updyke was a life member of The Ohio State University Alumni Association, Inc. and an avid football fan. She taught school for 40 years at Madison, Walnut, and Circleville elementary schools. A resident of Ashville, Elsie and her sister, Dorothy, were avid travelers. This fund supports Trinity Lutheran Church in Circleville where Elsie was a longtime member, and Trinity Lutheran Seminary. Elsie passed away in 2011, Dorothy in 2002.



LEGACY SOCIETY

The Legacy Society recognizes those individuals who have let the Foundation know they plan to leave a gift to the community through a bequest, trust, life insurance policy, retirement fund, or Charitable Gift Annuity.

More than 700 planned gift donors are members of The Columbus Foundation’s Legacy Society, which entitles members to participate in a wide range of Foundation events, activities, and initiatives.



717

Number of planned gift donors who are members of the Legacy Society

44

Number of new planned gifts

\$23,211,413

Total amount in planned gifts communicated to us in 2012

\$843,703,615

Total of future planned gift expectancies

2012 NEW PLANNED GIFT DONORS

- Anonymous (14)
- Shirley Dunlap Bowser
- R. Jeff and Kathleen M. Chrisman
- Robert S. Coleman
- Patricia S. Eshman, J.D.
- Victor A. Feldmiller
- Adalene S. Flechtner*
- Lee Fredette and Michelle Gubola
- Virginia D. Granat*
- Mark Kautzmann
- Charles A. Kerwood
- Michael S. Krasnoff
- John D. Lohrman
- Lee McCorkle
- Gerard J. and Margaret A. Nuovo
- Dayanand and Shila Patel
- Peter Planisek
- Douglas L. and Marjorie C. Reidel
- Karlon G. Roop
- Larry and Cheryl Simon
- Elaine and Eugene Stevens
- Joseph D. Wisne and Bridgette Mariea

*DECEASED



SUPPORTING FOUNDATIONS

29

NUMBER OF SUPPORTING FOUNDATIONS

\$420,266,955

COMBINED SUPPORTING FOUNDATIONS MARKET VALUE (As of December 31, 2012)

\$24,758,571

COMBINED 2012 GRANTS PAID

A Supporting Foundation offers a practical solution for donors interested in a private foundation who also want the advantages of “public charity” status, as with a fund within The Columbus Foundation. Through the creation of a Supporting Foundation, donors experience the autonomy of having a separate foundation and have the opportunity to involve their entire family or corporate staff.

Each Supporting Foundation is driven by the causes important to its donors, and is guided by their philanthropic spirit. Our staff provides all the personalized professional services needed to help them accomplish

their goals. Just as donors turn to professional advisors for their business, investment, and legal matters, they trust The Columbus Foundation’s expertise and knowledge to assist with their charitable giving.

In 2012, Supporting Foundations collectively paid nearly \$25 million in grants to support the nonprofits and programs they care about most. Since 1976, when the Columbus Youth Foundation became the first Supporting Foundation at The Columbus Foundation, Supporting Foundations have received more than \$590 million in gifts and distributed more than \$360 million in grants.

CURRENT SUPPORTING FOUNDATIONS

- | | | |
|--|---|--|
| Anonymous (2) | John B. and Dareth Gerlach Foundation | John H. McConnell Foundation |
| Battelle Charities | John J. and Pauline Gerlach Foundation | Meuse Family Foundation |
| Central Benefits Health Care Foundation | Greer Foundation | Moritz Family Foundation |
| Columbus Youth Foundation | Hinson Family Trust | Roush Family Foundation |
| Community Gifts Foundation | Ingram-White Castle Foundation | James A. and Kathleen C. Rutherford Foundation |
| Crane Family Foundation | Kidd Family Foundation | The Shackelford Family Foundation |
| William H. Davis, Dorothy M. Davis and William C. Davis Foundation | Arthur and Sara Jo Kobacker, Alfred and Ida Kobacker Foundation | Siemer Family Foundation |
| Dominion Homes—Borrer Family Foundation | Limited Brands Foundation | Robert F. Wolfe and Edgar T. Wolfe Foundation |
| Paul G. Duke Foundation | Marsh Family Foundation | |
| The FG Foundation | Raymond E. Mason Foundation | |



**WILLIAM H. DAVIS, DOROTHY M. DAVIS AND
WILLIAM C. DAVIS FOUNDATION**

A LASTING IMPRESSION

FAMILY TRADITION OF PHILANTHROPY LIVES ON

WHEN WILLIAM D. (BILL) WELLS took the stage at The Columbus Foundation's Davis Hall during an event in December 2012, he could hardly contain his excitement.

The event, attended by friends and nonprofit leaders to celebrate the *William H. Davis, Dorothy M. Davis and William C. Davis Foundation's* upcoming 20th anniversary, was a festive one. But Bill, chairman and president of the Davis Foundation, had another reason to smile. As a surprise, he and Davis Foundation board members handed out twenty \$20,000 grants to commemorate the occasion, as audience members gasped, cheered, and wiped away tears of joy.

A Supporting Foundation of The Columbus Foundation, the Davis Foundation was established in 1993 by Bill's great aunt, Dorothy M. (Dottie) Davis. Her

stepson, William C. Davis, established a Donor Advised Fund in 1988, and then provided funds in his estate to be used for charitable purposes, from which Dottie created the Supporting Foundation. She oversaw the foundation until she passed away in 1996. Bill, a founding board member, became president and has carried on the family legacy ever since.

The Davis Foundation has granted nearly \$30 million to a wide range of nonprofit organizations since its inception, including Franklin Park Conservatory, the James Cancer Hospital, Godman Guild, YMCA of Central Ohio, and Capital Area Humane Society.

The foundation has funded a number of meaningful projects at The Ohio State University, including the Dorothy M. Davis Heart and Lung Research Institute



William D. Wells in the Dorothy M. Davis Showhouse at Franklin Park Conservatory

at Ohio State's Wexner Medical Center, and Bill Davis Stadium, a 4,450-seat baseball stadium that Dottie reveled in during a construction walk-through just before her passing. It has also shown its community spirit through consistent and generous support of The Columbus Foundation's shared investment opportunities, contributing to the matching pools for numerous *Critical Need Alerts* and The Big Give.

"Today, we review each grant opportunity and try to determine where we can make the most impact for the amount of money granted," Bill explained. "Sometimes it is the larger organizations that will reach more people, other times it is supporting the very small nonprofits that, if given a little bit of money, can continue to provide services."

After beginning its support of Franklin Park Conservatory with grants for educational and agricultural programs, the Davis Foundation provided critical funding for the exhibition and purchase of the Dale Chihuly collection, which opened to the public in 2003. It went on to support the Conservatory's capital campaign and, in January 2012, the Conservatory dedicated the Dorothy M. Davis Showhouse in honor of Dottie.

Bill feels strongly about positioning the foundation for the future. His wife, Jackie, provides another "family" voice on the board, and his nephew, Chase, recently became involved. With a dedicated board of directors who find themselves asking "what would Dottie do?" during meetings, he hopes the foundation's goal of supporting this community in perpetuity will live on. ★

WILLIAM H. DAVIS, DOROTHY M. DAVIS AND WILLIAM C. DAVIS FOUNDATION BOARD MEMBERS: William D. Wells, chairman and president; John C. Lucas, vice chairman and treasurer; Ronald L. Whisler, vice president; Jacquelyn L. Wells, secretary; Linda B. Bowers, assistant secretary; Ralph L. Guarasci, assistant secretary; James L. Nichols, assistant treasurer; and Chase Wells, honorary trustee.



889 GLOBAL SOLUTIONS FUND

A SPIRITUAL JOURNEY

COUPLE EMBRACES FAITH-FILLED GIVING

WHEN JOHN F. LEWIS JR., a Columbus native, left central Ohio after law school to embark on an international career, he didn't know he would find love more than 6,000 miles from home. But in 1996, he met his wife, Judy Huang, who had immigrated to Boston at 11, but returned to China after college for work.

"John was working in China, too, and was actually one of my clients," laughed Judy. "Right person, right time."

In 1999, the couple returned to the United States to be closer to family and settled in Columbus. Since then, both have built successful careers and immersed themselves in the community, serving on numerous for-profit and nonprofit boards.

Established in 2011, their Donor Advised Fund, *889 Global Solutions Fund*, was named for Judy's company, a contract manufacturer that helps customers utilize first-rate, quality manufacturing capabilities in

China. The couple is passionate about giving back and providing both financial and volunteer support for causes important to them, including their church, Xenos Christian Fellowship, and numerous international ministries.

"Being an immigrant, I've had a lot of people who have helped me along the way. From scholarships, to mentors, to my church, all along the way I've had people who have given to me. This is really just paying it forward," Judy said, with John nodding his head in agreement.

John is the president & CEO at BioOhio, an organization focused on job growth in the bioscience industry. Judy and John involve their 7-year-old daughter, Faith, in the family's philanthropy, volunteering with programs like Meals-on-Wheels to illustrate positive examples of helping others in need.

"Everything Judy and I have was given to us by God," John said. "It's been nice to have been given more than we need. It's just the right thing to do—to give back to others." ★



A 6x6 grid of 36 small images showing various people and activities, likely from a community event or festival. The images depict a diverse range of scenes: people interacting, children playing, athletes competing, and various cultural or artistic displays. The overall theme is community engagement and celebration.



2012 FINANCIAL SUMMARY

INVESTMENT PERFORMANCE

The 2012 equity markets, while experiencing continued volatility, ultimately rewarded long-term investors such as The Columbus Foundation with double-digit returns. Given all of the political, economic, and market uncertainty faced during 2012, the S&P 500 Index finished the year up 16 percent, with all of the other major equity indices posting similar strong gains. Financial assets rallied despite the seemingly endless negative news concerning the European sovereign debt crisis, the U.S. fiscal cliff, and the slowing growth in emerging markets. After the 2008 unprecedented market declines, “staying the course” tested the resolve of many investors. However, the Foundation continued to accept market fluctuations as the new “normal” and to view investment performance on a long-term basis. Now, four years later, all of the Foundation’s unrealized loss in the market value of its investments from 2008 has been reversed.

For 2012, the Foundation experienced investment returns consistent with standard benchmarks/indices, and for the last five years also generated results consistent with these same standards. While the asset allocation does vary by fund type, the

Foundation’s overall asset allocation at the end of 2012 was approximately 70 percent in equities and 30 percent in fixed income, money market, and/or alternative investment vehicles.

The Columbus Foundation and its Supporting Foundations have consistently applied a long-term approach to investing, including maintaining conservative investment practices with diversified portfolios. Utilizing a longstanding balanced investment approach, particularly over the past five years, has resulted in investment returns consistent with and in many instances better than traditional benchmarks, such as the S&P 500 Index. In addition to evaluating asset allocation policies, each entity also continues to evaluate its individual spending/grantmaking policies—in many instances reducing spending rates in anticipation of diminished future investment returns.

This conservative approach to investing assets is fundamental to the Foundation’s overall investment philosophy. Although the many financial institutions that the Foundation utilizes to custody and invest Foundation assets provide prudent and careful stewardship of the assets entrusted to them, it is the Foundation’s Investment Committee and Governing Committee that

determine investment policies and provide important guidance and oversight.

The Foundation’s Investment Policy, formulated by its Investment Committee and approved by the Foundation’s Governing Committee several years ago, continues to provide guidance for the many financial institutions that hold and manage Foundation assets. The Investment Committee meets on a periodic basis and continues to review investment management performance to evaluate potential investment vehicles that will enhance portfolio mix, reduce volatility and risk, and maintain the consistent grantmaking ability of the Foundation’s permanent funds, on an inflation-adjusted basis.

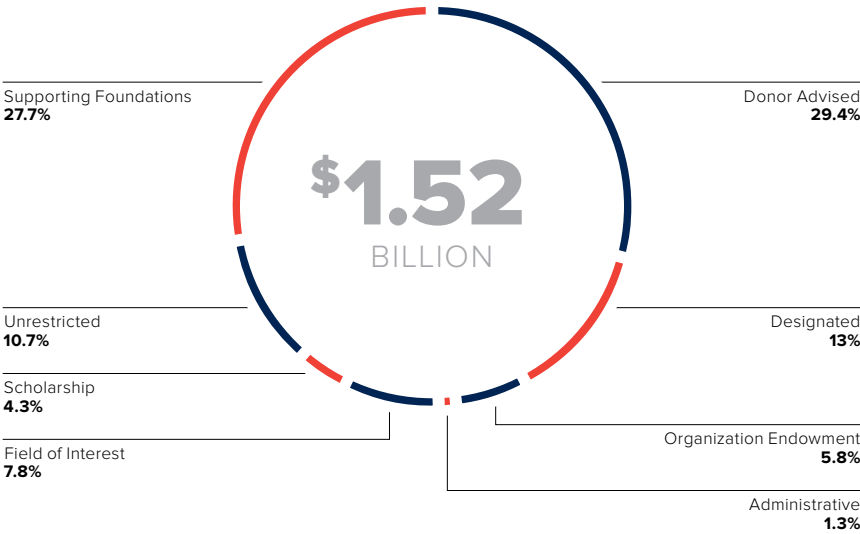
AUDIT

Consistent with prior years and observing industry best practices, The Columbus Foundation and its Supporting Foundations engaged the services of an independent public accounting firm to perform an audit of the Foundation’s records and 2012 financial statements. As a part of its work, the public accounting firm also conducted a review of the Foundation’s internal controls and reviewed their findings with an independent Audit Committee comprised of at least one Foundation Governing Committee member and two other accounting/financial experts.

John Gerlach & Company has completed its audit of both the calendar year 2012 combined financial statements for The Columbus Foundation, as well as the underlying supporting records. Copies of the comparative 2012 and 2011 combined audited financial statements, including the independent public accounting firm’s opinion, are posted on the Foundation’s website, www.columbusfoundation.org, or may be obtained by calling 614/251-4000.

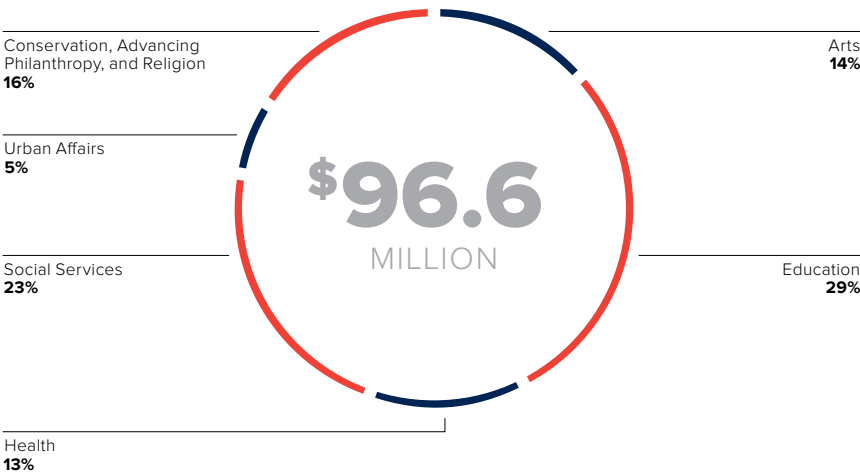
ASSETS BY FUND TYPE

for The Columbus Foundation, Supporting Foundations, and Community Foundations, Inc.



GRANTS PAID BY FIELD

for The Columbus Foundation, Supporting Foundations, and Community Foundations, Inc.



\$326.4 MILLION

TOTAL GIFTS MADE TO NEW AND EXISTING FUNDS AND SUPPORTING FOUNDATIONS

\$1.52B

TOTAL ASSETS HELD IN 2,007 FUNDS AND 29 SUPPORTING FOUNDATIONS

\$96.6M

TOTAL GRANTS PAID TO 2,579 NONPROFIT ORGANIZATIONS

\$1.37B

TOTAL GRANTS AWARDED SINCE 1945

600

NUMBER OF NONPROFITS THAT HAVE JOINED
POWERPHILANTHROPY AND COMPLETED PORTRAITS



SEVENTH

ASSET RANKING AMONG MORE THAN 750 COMMUNITY
FOUNDATIONS IN THE UNITED STATES

\$1,773,778

AMOUNT OF SCHOLARSHIP GRANTS AWARDED

\$23.2M

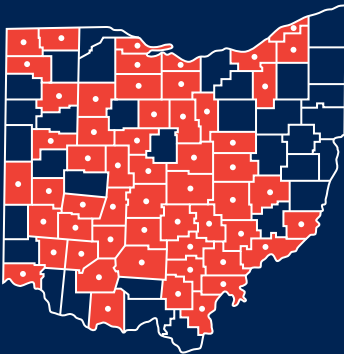
PLANNED GIFTS COMMUNICATED TO US

\$843.7M

TOTAL OF FUTURE PLANNED GIFTS TO DATE

.61%

OPERATING BUDGET AS A PERCENT
OF ASSET MARKET VALUE



COLUMBUS FOUNDATION DONORS RESIDE
IN 55 COUNTIES AND 37 STATES

PROFESSIONAL COUNCIL

The Columbus Foundation has the privilege of working with nearly 200 professional advisors, including attorneys, financial advisors, accountants, insurance professionals, and others who connect their philanthropically minded clients with the Foundation’s expert resources.

We recognize and thank our family of professional advisors who have supported the Foundation by working with clients on charitable gift and estate planning strategies. We partner with professional advisors to generate the most effective philanthropy possible in our community.

Alan S. Acker Carlile, Patchen & Murphy LLP	Bruce D. Bernard Bernard Law LLC	Thomas M. Cummiskey, J.D. Park National Bank	Victor J. Ferguson Vorys, Sater, Seymour and Pease LLP	William T. Grové UBS Financial Services, Inc.
Robert H. Albert, Sr. Kagay, Albert, Diehl & Groeber	Thomas J. Bonasera Dinsmore & Shohl LLP	Thomas W. Curry, CLU, ChFC Curry and Co.	Frederick L. Fisher	Paul A. Gydosh, Jr., CFP Kensington Wealth Partners, LTD.
Misty H. Aldrich Campbell Hornbeck Chilcoat & Veatch LLC	Paul J. Breen, CPA WealthStone	Jonathan D. Dargusch WesBanco Bank, Inc.	Lloyd E. Fisher, Jr. Porter Wright, LLP	R. Matthew Hamilton, CFP Hamilton Capital Management
Jerry O. Allen Bricker & Eckler, LLP	James L. Budros, Jr., CFP Budros, Ruhlin & Roe, Inc.	Robert T. Deitrick, ChFC Polaris Financial Partners	James G. Flaherty James G. Flaherty, Attorney	Robert D. Hamilton, CFP P.D.S. Planning, Inc.
Harry W. Archer CFP, ChFC, CLU, REBC, RHU NettWorth Financial Group	Stephen Cartwright Sweney Cartwright & Co.	R. H. Dillon, CFA Diamond Hill Capital Management, Inc.	Michael J. Ford, Jr.	Paul A. Hanke, Esq. Porter Wright, LLP
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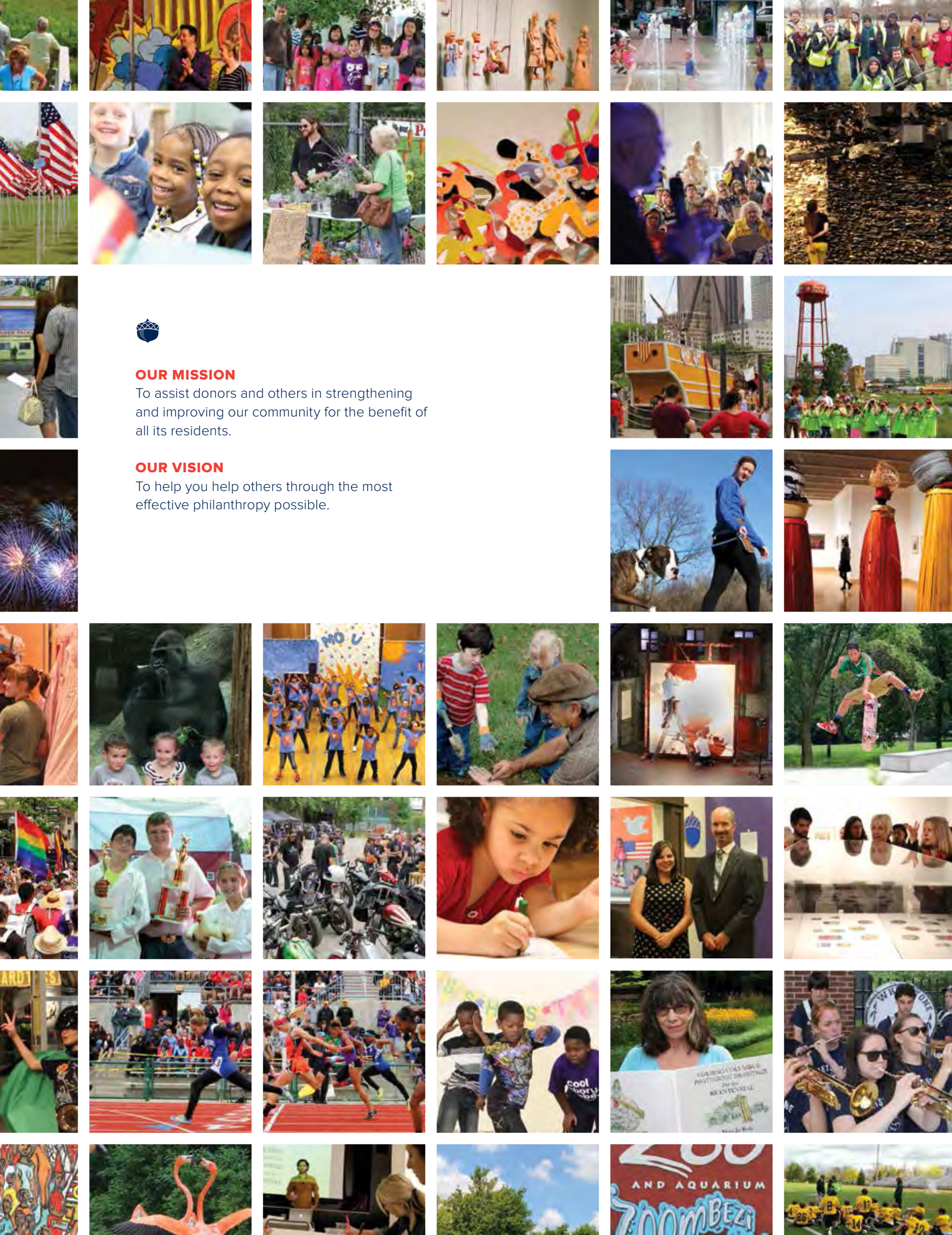
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