

THE COLUMBUS FOUNDATION
WINTER

2013/2014

NEX-US (nĕk'səs) N., 1. A MEANS OF CONNECTION; A LINK OR TIE. 2. A CONNECTED SERIES OR GROUP. 3. THE CORE OR CENTER.



CELEBRATION OF PHILANTHROPY

Awards recognize philanthropic excellence



2 MINUTES WITH...
JERRY JURGENSEN

What moves him to be "a man for others"





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BOOKS THAT INSPIRED ME

"Great books are about things that matter"

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YEAR-END GIVING

Tips and tools to help you achieve your charitable goals





PRESIDENT'S **PERSPECTIVE**



Douglas F. Kridler President and CEO

"What in the world was that?" the person in the seat next to me yelled out. Our plane had just been in its descent late one January night when it veered sharply to the right. I looked out the window, and the airplane's lights cut just enough through the heavy snow to show the airport's control tower passing within inches of the left wing of the airplane. Yikes!"

t had been a long day already, and many had questioned the wisdom of getting on an airplane after the major televised event in Des Moines, in order to make the trip to another lowa city. The passengers on this chartered aircraft were the leading reporters from the top newspapers, magazines, and television networks, so they were used to the rigors, and dangers, of travel on the campaign trail—but even they were unsettled by what had just happened.

The next thing we knew, without exclamation or fanfare, someone got up from the back of the plane, and with a brisk but confident pace, approached the door of the cockpit. Then he knocked. I had a perfect view of what unfolded, as I was, because of my logistical responsibilities on this campaign trip, seated in the first row.

I wondered whether, in the midst of gathering themselves from the aborted landing, the pilots would respond to the knock on the door, but they did, and the copilot opened the door a crack to see who was knocking. There were words exchanged in a professional way, and then what I saw next was amazing—the copilot took off his headset, squeezed his way out of his seat, and the passenger slid into the copilot's chair. Just as the copilot settled into the jump seat in the cockpit, he closed the door, and I was only left to imagine what was going to happen next.

What happened is that we landed safely, with

cheers erupting from the passengers. After the landing, the passenger who had entered the cockpit emerged, grabbed his coat, and headed down the stairway to the airport's tarmac. Once on the ground, there was no bragging or attentionseeking by this passenger, nor even any effort to explain what had happened; he simply walked to his car and headed to the hotel, having done what duty called for: to protect the safety of those on this plane.

The leadership, bravery, and skill that passenger instinctively showed in a moment of great concern, if not crisis, was remarkable. But the humility that was shown in not seeking praise or credit for this extraordinary act was equally so. That sums up the national hero we have gotten to know so well in central Ohio, Senator John Glenn, whose presidential campaign I was so fortunate to be able to work on, with whom I was able to travel, and from whom many lessons I was able to learn. Senator Glenn landed that plane that day, but I am confident you have never heard him boast about it.

Always being ready to help, being willing to have our knowledge and skills tested, stepping up at times of need, and always maintaining a humility towards those whom we serve are the principles that guide us at The Columbus Foundation. We wish you happy holidays and only safe landings in the year ahead!



Winter 2013/2014

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OUR MISSION

To assist donors and others in strengthening and improving our community for the benefit of all its residents.

OUR PROMISE

To help you help others through the most effective philanthropy possible.



Want to share NEXUS with a friend? Check out our digital version online at http://

columbusfoundation.org/publication/ nexus-winter-20132014

For more information, visit www. columbusfoundation.org or call 614/251-4000.







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Confirmed in compliance with national standards for U.S. community foundations



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SHARE THE SPIRIT OF THE SEASON WITH OUR **CHARITABLE GIFT CARDS!**

The Columbus Foundation's new Charitable Gift Card is a personal and meaningful gift. Purchase physical or electronic gift cards online in denominations of \$50 and \$100 using a major credit card. Or, use your Donor Advised Fund for purchases of \$100 or more. Recipients can support more than 630 nonprofits featured in PowerPhilanthropy.®

Visit www.TCFGiftCardPurchase.org or call 614/251-4000 for more information.

Spirited Community Effort Sets New Big Give Record



WHEN THE COLUMBUS FOUNDATION'S Director of Donor Services and Development Lisa Jolley stopped to pick up coffee for Foundation employees who had spent the night supporting The Big Give, she had a large order to fill. During the long wait, the woman behind her joked about how she must be treating the whole office.

"No," laughed Lisa. "We are in the middle of The Big Give and many of our employees have been up all night."

The woman's eyes lit up. "That is wonderful what you guys are doing for the community! I am at OSU, and we have encouraged all of our donors to get online and make their gifts as well." She then proceeded to help Lisa to her car with all the drinks.

The Big Give warmed hearts throughout our community when the Foundation's second 24-hour event was held on September 17-18. Thanks to the incredible response from people across the country and around the world, the extraordinary collective effort leveraged more than \$10.6 million for 569 central Ohio nonprofit organizations. A special



thanks to Worthington Industries for putting The Big Give over the \$1 million mark for bonus pool funds. In total, a record \$1.1 million in bonus pool funds was raised to amplify gifts thanks to the Foundation, its family of donors, and community partners.

Created to support hundreds of nonprofits working to strengthen and improve our community, The Big Give utilized the Foundation's online marketplace, PowerPhilanthropy.® Donations received during The

Big Give were eligible for bonus pool funds on a pro rata basis, giving everyone who participated the opportunity to have their donation(s) amplified. In addition, all credit card fees were covered by The Columbus Foundation, so 100 percent of donations went directly to the nonprofits. In 2011, the first Big Give raised \$8.5 million for 501 nonprofits.

The Big Give proved even bigger when four leading Columbus-based businesses offered special, limited-time rewards to Big Give donors. Gateway Film Center, Homage, Jeni's Splendid Ice Creams, and Piada Italian Street Food all offered discounts or free items when participants of The Big Give showed their tax receipt. Scoop shop employees at Jeni's doled out 710 free scoops of ice cream over the 2-day period!

SOCIAL MEDIA ACTIVITY:



FACEBOOK

247,856 people reached 1,779 likes 496 shares



TWITTER

449,763 people reached 721 tweets 2,093,286 impressions of tweets



YOUTUBE

Six videos 4,563 views

THE BIG GIVE BY THE NUMBERS

\$10,656,49**4**

TOTAL LEVERAGED

\$0.119 per \$1 BONUS POOL FUNDS

18,615 TRANSACTIONS

944 Foundation Donor Grants + 17,671 Public Credit Card Gifts

6 COUNTRIES — Canada, Germany, Japan, Korea, Spain, United States

49 STATES plus the District of Columbia and Puerto Rico

820 CITIES — including Atlanta, Boston, Charlotte, Dallas, Denver, Los Angeles, Miami, Milwaukee, Nashville, Omaha, Phoenix, Salt Lake City, and Seattle

LARGEST CREDIT CARD GIFT:

\$50,000 to Ohio Christian University

LARGEST DONOR GRANT:

\$750,000 to The Ohio State University Foundation

 $\begin{tabular}{ll} \textbf{MEDIAN GIFT} from public credit \\ card gifts: $50 \end{tabular}$

MEDIAN GRANT from Foundation donors: \$1,000

3.161 TRANSACTIONS

made in honor, in memory, or on behalf of someone

TOP TEN RECIPIENTS BY AMOUNT:

The Ohio State University Foundation **\$1,268,294.59**

Columbus Zoological Park Association **\$362,470.51**

Columbus Museum of Art **\$335,668.95**

Columbus Academy

\$323,203.36

Central Ohio Youth for Christ **\$292,923.39**

The Wellington School

\$261,920.51Mid-Ohio Foodbank

\$250,369.39

Columbus Jewish Federation

\$224,237.47 Community Shelter Board

\$185,461.32

United Way of Central Ohio, Inc. **\$172,274.49**

TOP TEN RECIPIENTS BY TRANSACTIONS:

Mid-Ohio Foodbank	787
WOSU Public Media	699
WCBE 90.5 FM	425
The Ohio State University Foundation	320
Faith Mission, Inc.	277
The Wellington School	251
Central Ohio Youth for Christ	204
Local Matters	191
The Childhood League Center	178
Columbus Zoological Park Association	168



Wesley Glen residents Ruth Quillin and Verrill Barnes participated in The Big Give with a little help from Jill Easterling, executive director of development.

WESLEY GLEN EMBRACES THE BIG GIVE!

WESLEY GLEN RETIREMENT COMMUNITY made it easy for residents to participate in The Big Give. Jill Easterling, executive director of development for Methodist ElderCare Services, held office hours during the 24-hour event to simplify the process and help with credit card input and online giving through PowerPhilanthropy.®

According to Jill, approximately 15 residents donated a total of \$4,700 during the event, with \$3,700 benefiting Wesley Glen, and the remaining gifts going to various central Ohio nonprofits close to residents' hearts. During The Big Give, the organization received 47 donations totaling \$27,241.62. The money raised will be used to support the Charitable Care Fund, which helps provide financial assistance to residents in need.

"The Big Give was a wonderful opportunity to enhance our gifts, along with keeping philanthropy top of mind," Jill said. "A few residents took this opportunity to make their first gift to Wesley Glen. They wanted to be a part of the excitement and momentum of The Big Give."



Nearly 400 people attended Celebration of Philanthropy events at The Columbus Foundation on September 12, recognizing the remarkable spirit of our donors, nonprofit partners, and friends.

Together, we commemorated a record-setting year, applauded inspiring philanthropic leadership in our community, and saluted a groundbreaking initiative that continues to make a difference in people's lives around the state.

★ HIGHLIGHTS FROM 2012 INCLUDED:

Contributions made to the Foundation and our Supporting Foundations exceeded all previous records—with gifts totaling more than \$326.4 million.

Broad participation in the Foundation included nearly 5,600 gifts from the community and the creation of 142 named funds.

We learned of more than \$23.2 million in planned gift expectancies, bringing total planned gift expectancies to \$843.7 million.

As of December 31, 2012, our assets totaled \$1.52 billion held in 2,007 charitable funds in The Columbus Foundation, Community Foundations, Inc. (our statewide affiliate), and 29 Supporting Foundations.

\$96.6 million in grants benefited 2,579 nonprofits—primarily in central Ohio.

Scholarship grants totaled \$1.77 million and enabled more than 700 students to realize the dream of a higher education.

2013 PHILANTHROPY AWARDS





Columbus Foundation donors and community leaders Robert Jr. (Bob) and Mary Lazarus received the *Harrison M. Sayre Award*, given in honor of the Foundation's founder and 25-year volunteer director. Through their collective giving, Bob and Mary have shown a remarkable

philanthropic spirit—championing efforts through volunteer support and gifts that have positively impacted a wide range of organizations and programs, from education and the arts to healthcare and basic needs.

"The community has been awfully good to us and we certainly want to try to return that." —BOB LAZARUS





The *Leadership in Philanthropy Award*, created in 2011, recognizes outstanding philanthropic contributions to communities beyond central Ohio. John D. (Jack) and Jane Kidd of Jackson have been community leaders for decades, and through their family foundation, the

Kidd Family Foundation, have backed efforts surrounding basic needs and educational opportunities, including support for The Ohio Benefit Bank, their local YMCA, and Christ United Methodist Church. The couple has also provided critical support to the University of Rio Grande and the Jackson and Oak Hill school districts.

"Our mission with our foundation is to make sure there will be enough to really make a difference in education in Jackson and contiguous counties in perpetuity." —JACK KIDD

\$1,000,000,00

The Ohio Benefit Bank— \$1 Billion and Counting!

THE CELEBRATION OF PHILANTHROPY was the perfect opportunity to congratulate and applaud an extraordinary milestone achieved by The Ohio Benefit Bank in July.

In 2006, The Columbus Foundation approached its donor family with a unique opportunity to co-invest in a new web-based program that would connect low-income Ohioans with benefits and free tax support. A total of \$213,000 was committed to help launch the effort.

Since then, the Foundation and its donors have provided ongoing support for this revolutionary program—granting more than \$3.1 million to help OBB expand to include access to free tax filing, federal student aid, Veterans' benefits, nutrition assistance, childcare benefits, and much more.

By reaching people where they live, work, learn, and pray with life-changing work support programs and tax credits, OBB has returned over \$1 BILLION in potential income enhancements to individuals and families in need. Today, more than 4,700 trained counselors blanket the state, providing pivotal support to 1,270 sites where individuals and families can seek help. In total, OBB has made a difference in the lives of more than 486,000 individuals in Ohio.

This program continues to make the experience of asking for help in a time of need an inviting one rather than an intimidating one.

The Foundation congratulates OBB on this amazing accomplishment!





Created in 1986, *The Columbus Foundation Award* recognizes organizations that have made a difference in the quality of life in our community. The Foundation was proud to present the 2013 recipient, the Furniture Bank of Central Ohio, with a \$25,000 grant. Founded in 1998 as

Material Assistance Providers Inc., or MAP, the Furniture Bank is the largest provider of free furniture services to families in poverty in central Ohio. In 2012, the organization served more than 4,100 families in need.

"We let clients select their own furniture. They decide what's most important and what works for them." —JIM STEIN, president of the Furniture Bank of Central Ohio

FOUNDATION SNAPSHOTS



The Foundation's **Summer Fellows** did amazing and important work with 11 host nonprofit organizations. From the Ohio Environmental Council to Ethiopian Tewahedo Social Services, these young scholars worked to make Columbus a better place for everyone. To learn more about the Fellows, visit their blog at http://tcfsummerfellows.wordpress.com.



In July, The Columbus Foundation welcomed Dr. Bernard Master for a special **Your Philanthropy** luncheon presentation, *Backyard Birding with a World-Class Expert*, where he shared firsthand photos and stories of rare bird sightings in his very own backyard.



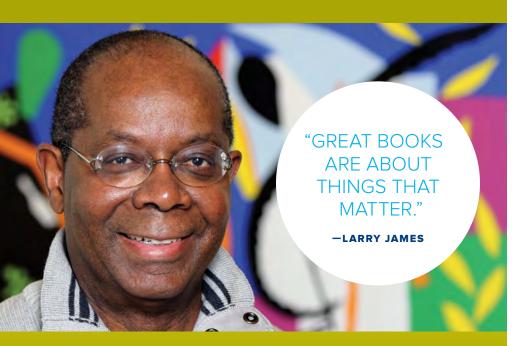
The Columbus Foundation is thrilled to collaborate with The Columbus Partnership in an effort to maximize the development of **Lean In Circles** in the Columbus region. The Foundation hosted the local Lean In Circles launch thanks to donors Nancy Kramer and Kelly Mooney, both of whom have been asked and trained by the author of *Lean In* and Facebook executive, Sheryl Sandberg, to help lead the effort in our region.



Earlier this year, a group of organizations received grants from the **Medical Mutual of Ohio (MMO) Charitable Fund** to support programs that assist in preventing and reducing obesity for youth in Franklin County. Pictured at a June event are (left to right), Kathy Hayden, Girls on the Run; Andrew Roberts, YMCA; Rick Chiricosta, CEO of MMO; Jared Chaney, EVP of MMO; Mary Lou Langenhop, Children's Hunger Alliance; Elfi Di Bella, YWCA; Michael Jones, Local Matters; Barb Seckler, Columbus Public Health, Institute for Active Living; and Anthony Trotman, Franklin County Job & Family Services.



Books that Inspired Me



Columbus Foundation donor Larry James is a lifelong reader who is passionate about the benefits books bring to his life. A partner in the law firm Crabbe, Brown & James, Larry is one of the most respected litigators in central Ohio, and has been a civic, political, and nonprofit champion for more than 30 years.

What book(s) are you currently reading? Do you typically read more than one at a time?

I just finished reading *David and Goliath* by Malcolm Gladwell and *The System* by Jeff Benedict and Armen Keteyian. I usually read one book at a time. But, I consistently read *The New York Review of Books*. To me, it doesn't get any better than that.

Are you typically drawn to one genre, be it fiction, nonfiction, biography?

I usually read nonfiction. Being a political science major, and also a political junkie, nonfiction becomes a lifeline. Whether you're following national or international politics, or history and what moves people, it's the nonfiction world that captures it. I love reading about people that were larger than life.

Is there a specific book that had a large impact on your life?

If there were two books that had an impact on me, they were Plato's Republic and The Traveler's Gift. The Traveler's Gift was about seven personalities, including Anne Frank, King Solomon, Harry Truman, Christopher Columbus, and Abraham Lincoln. It was about doubt, confidence, discipline, dreaming, and the ability to overcome odds. If you look at the decisions they had to make and the doubts the rest of the world had—it was just extraordinary that they persevered and moved forward.

The book proved relatable to me, particularly in how I grew up. I read it about three years ago at the repeated urging of Jim Tressel. He was adamant because he said I was the type of person this book would stay with. And he was right.

The other book, *Plato's Republic*, was about building a society. When you talk about establishing religion and nation building, it was all there. There are so many lessons within it. It's just one of the all-time great classics.

What authors do you admire, and why?

Weinland Park native Wil Haygood has become my favorite author. His writings are about great personalities such as Adam Clayton Powell (King of the Cats), Sammy Davis, Jr. (In Black and White: The Life of Sammy Davis, Jr.), Sugar Ray Robinson (Sweet Thunder), and Eugene Allen-his newspaper article that inspired the book (The Butler: A Witness to History) and the movie (Lee Daniel's *The Butler*). Through his writing, he is able to truly capture the totality of an individual. These are people and personalities that no one else has written about. He covers an area that reflects a total American history.

Are there books you would like to read but haven't had a chance to? What's next on your reading list?

There are too many books to name. One area in which I feel very lacking is religion and the Bible. I went to Israel this past summer. I realized if I had been more learned from a biblical standpoint, I would have had a better appreciation of the history I was experiencing. The most learned people that I've had conversations with are the clergy, and I feel I would be better able to have those intellectual conversations if I knew more about those things.

Make the most of your year-end giving

LOOKING FOR A WAY TO DIVERSIFY without getting hit with an immediate capital gains tax? Since 1993, The Columbus Foundation has been offering Charitable Gift Annuities (CGA), a giving option that provides a cost-effective way to support causes you care about while guaranteeing a lifetime income for yourself.

A CGA enables you to increase spendable income, eliminate investment concerns, and receive a charitable tax deduction. Those who choose to provide for our community's future through a CGA become members of the Foundation's Legacy Society, developed to recognize those who commit to a future gift.

"Bow and I established our Charitable Gift Annuity with The Columbus Foundation in 2004. We chose the CGA as our planned giving vehicle because of the partial tax deduction and stream of annual income for both our lives. In addition, it will eventually be used to support charities we care about. The Charitable Gift Annuity has been a real win-win for us," said donor Jim Nicholson.



Bow and Jim Nicholson in front of their German Village home with dog, Kirby.

HOW DOES A CHARITABLE GIFT ANNUITY WORK?

- An individual, age 60 or older, enters into a contract agreement with The Columbus Foundation to transfer a minimum of \$10,000 in assets, cash, or securities to the Foundation.
- In exchange, the Foundation commits to provide a fixed and guaranteed payment for the remainder of his or her lifetime.
- The total annual payment is fixed and can be paid monthly, quarterly, semiannually, or annually.
- A second annuitant can be named, if the donor chooses.
- Upon the death of the donor (and second annuitant, if one is chosen)
 a fund is established at The Columbus Foundation with the remaining
 principle to carry out the donor's charitable intentions.
- Payment rates for gift annuities are established by the American Council on Gift Annuities and are based on the annuitant(s) age at the time of the gift.

IRA ROLLOVER

If you haven't taken advantage of it yet, an IRA Rollover is a great way to achieve your charitable goals. The IRA Charitable Rollover was extended for 2012 and 2013 as part of the American Taxpayer Relief Act of 2012 signed into law by President Obama on January 2, 2013.

- Anyone 70 $\frac{1}{2}$ or older is eligible to withdraw up to \$100,000 from their IRA and transfer those funds outright to a charitable organization tax free.
- Anyone 70 ½ and older can transfer up to \$100,000 in 2013.
- If married, each spouse can transfer \$100,000 per year from his or her IRA.

DON'T FORGET!

- Year-end is a great time to give gifts of appreciated securities to avoid the capital gains tax and get a full charitable deduction!
- All gifts must be received at The Columbus Foundation or postmarked by December 31, 2013 to be eligible for a 2013 tax deduction.
- Grant suggestions must be received by Monday, December 18 in order for grant checks to go out by December 31. However, there is no tax reason grants need to be made before this date.

Interested in learning more about Charitable Gift Annuities or have questions about yearend giving? Please contact Angela Parsons, J.D., at aparsons@columbusfoundation.org or



Governing Committee member
Jerry Jurgensen is a clear-minded,
independent thinker who has
given his time and talents to the
Foundation since being appointed
to the Committee in 2008. Jerry
recently shared his insights on
Columbus and what motivates
him to be a "man for others" with
Columbus Foundation staff.

How did your path lead you to Columbus?

I grew up in Omaha, Nebraska, where I went to Creighton University. I married my wife, Patty, when we were in college. After that, I worked full time and went to school, and Patty worked to help put me through college and graduate school. In 1977, we moved to Minneapolis, where I was a banker with Norwest.

In 1990, I was offered the opportunity to join First Chicago, which was one of the largest banks in the country. It was a chance to expand my horizons and do something new. In 1998, First Chicago merged with Banc One, and the board decided it was going to look outside of both businesses for someone to succeed John McCoy, who stepped down as CEO in 1999. After new management came in, I received an offer to come and lead Nationwide Insurance in Columbus. I took it—and started with the company in May 2000.

You are known for being someone who is passionate about helping others. Where does your feeling of social responsibility come from?

In my case, it's crystal clear. I went to Creighton Prep, an all-boys Jesuit high school in Omaha. I learned everything I felt I needed during high school. They taught me *how* to think—not *what* to think. And that made all the difference in the world. In high school, we were reminded at least once a day why we were on the planet. From day one, they taught us "you are here to be a man for others. You were put here to make a difference." I took that in—hook, line, and sinker.

Can you share some of the organizations and causes you have been proud to be part of?

While in Minneapolis, I got involved in a social service agency, Catholic Charities, through a board opportunity. It was an extremely large

agency. That was my first introduction to what really goes on in big cities behind the scenes, and what's happening with poverty and homelessness—all the issues that every urban center is concerned with. While in Chicago, I worked with Metropolitan Family Services—and I picked up where I left off in Minneapolis.

When I got to Nationwide in 2000, I was on a mission to take the company and see what I could do with it—for others. You couldn't walk into a better place in the country with that mission. It already was a great corporate citizen and had a long history of community involvement.

While my personal involvement had been in social services in the past, I also embraced the challenge of working with Columbus City Schools. I chaired two different governor's commissions on education in Ohio. I was proud to be a part of many new initiatives, including Principal for a Day, Project Mentor, and Project Grad. Now, in addition to supporting the expansion of the Columbus Museum of Art, I have joined the board of one of the most impressive charter school operations here—Columbus Collegiate Academy.

"In regard to my time at The Columbus Foundation, I'm proudest of the things that are better off than we found them. That's the only yard stick I ever apply to anything I do—did I leave it better than I found it?"

—JERRY JURGENSEN

What do you feel are some necessary elements for a great organization?

I think the first thing is mission. Is the mission worthwhile, sound, and does it make a difference? Values also play an important role in a great organization. Finally, how effectively and efficiently is the organization run? You need to figure out, within an organization, if the things you are doing are truly making a difference. It's not enough just to go out and work on things so that you feel good as a human being. For some people, that's okay. For me, that's never enough. I don't want to just feel okay—I want to feel good. I want to actually fix things.

NEW FACES IN DONOR SERVICES AND DEVELOPMENT

IN SEPTEMBER, The Columbus Foundation's Donor Services and Development team welcomed professional fundraising veteran Jeff Byars as associate director, and appointed Alicia Szempruch scholarship manager.

As associate director, Jeff's primary focus is to enhance community philanthropy and the work of the Foundation by helping individuals and corporate donors, their families and advisors, and nonprofit organizations achieve their philanthropic goals.

Prior to joining the Foundation, Jeff served as senior director of development at The Ohio State University College of Education and Human Ecology, and as director of development for the Wexner Center for the Arts. He holds a bachelor's degree from the University of Illinois, Urbana/Champaign, and a master's degree from DePaul University.





Jeff Byars

Alicia Szempruch

As scholarship manager, Alicia manages
ScholarLink,® a connection point for The
Columbus Foundation's scholarship program.
Her responsibilities include overseeing the dayto-day aspects of each scholarship fund, and
maintaining and building donor relationships.

Alicia joined the Foundation in 2010 as nonprofit engagement administrator.



PROUD TO REPRESENT THE BUCKEYE STATE

The Columbus Foundation was included in KerstenDirect's 2013 United States of Nonprofits graphic as the largest nonprofit in Ohio.*

For 70 years, the Foundation has served as the *trusted philanthropic advisor*,® and since grantmaking began in 1945, the Foundation and its donors have awarded nearly \$1.4 billion in grants to support nonprofits, primarily in central Ohio.

*Nonprofits were selected based on highest income/revenue listed in Guidestar. Hospitals/health systems, universities and schools, associations, co-ops, private foundations, affiliates, and museums were excluded.















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.















