The Marion Community Foundation announces the recipients of its 2012 Competitive Grant Program. According to MCF president Brad Bebout, the Foundation is pleased to be able to support $522,889 of the nearly $883,000 in grant requests. The 2012 grant program includes awards of 19 major and 8 mini-grants to Marion area organizations.

The 2012 major grants are as follows:
- $10,000 to Royal Family Kids Camp for abused and neglected Marion County children,
- $10,000 to Marion Matters for their Getting Ahead, Transition, and Ally programs,
- $12,500 to Habitat for Humanity in 2013 and $12,500 in 2014 for the Habitat Marion ReStore,
- $5,000 to Marion Harding High School in continued support of the CTAG Program for at-risk students,
- $9,000 to the Harding Home for an enhanced security system,
- $6,000 to the I Can Center of Excellence in support of the ACT Empowered Program,
- $5,700 to the Legal Aid Society for their Keeping Kids in School program,
- $25,000 to the Marion Area Counseling Center in continued support of their Housing Assistance Program,
- $50,000 to Boys & Girls Club for the development of the Oak Street Club House,
- $10,000 to Mobile Meals of Marion County to support the Mobile Meals Assistance program,
- $25,000 in ongoing support of Prairie Parks Foundation, Inc. to assist with Phase 3 development of the Marion Tallgrass Trail,
- $45,000 to The Salvation Army for their Food & Crisis Intervention program,
- $120,000 to the Center Street Community Health Center for ongoing support of their medical and dental care programs,
- $22,500 to the Marion Area Counseling Center for their Signs of Suicide program,
- $13,271 to the Marion Adolescent Pregnancy Program for their educational program Changes & Choices,
- $4,875 to the Marion-Crawford Prevention Program for their Preventing Prescription Drug Abuse program,
- $40,000 to Ohio Heartland Community Action in continued partnership in the United Community Rx Program,
- $5,000 to Ronald McDonald House Charities for their Helping Hands Program for Marion County residents, and
- $34,262 to the Marion Family YMCA for Pioneering Healthier Communities.

The monetary awards for these grants come from nine unrestricted, donor advised, and field of interest funds at Marion Community Foundation, including the “C” Fund, Founders’ Fund, Chester & Mildred Roberts Fund, Conway Family Charitable Fund, Kenny Martin Charitable Fund, The A. Merle Hamilton Fund, Robert M. & Dorothy C. Wopat Community Fund, Henry Heinzmann Community Food Pantry Fund, and the Healthcare Fund, MCF’s first fund.

Marion Community Foundation has a long history of support of healthcare in general and the Center Street Community Health Center, specifically. One of the largest grant awards each year is provided in support of the organization’s medical and dental services to uninsured and underinsured residents of Marion. This year CSCCHC will receive an additional $19,597.50 as part of a five-year pledge of $130,650 in support of their new facility in downtown Marion. Next year, CSCCHC will receive $26,130 of that pledge.

The Francis & Thelma Wise Fund, a designated fund for health-related projects, awarded three grants. These include:
- $2,465 to the Eye-to-Eye Low Vision Support Group for their Surviving Sight Loss program,
- $2,000 to the Marion Family YMCA for their Arthritis Foundation Exercise Program, and
- $4,585 to the Marion Family YMCA for their Delay the Disease program for Parkinson’s disease sufferers.

The Brown Family Non-Endowed Fund is also providing support for the YMCA’s Delay the Disease program by making an additional grant of $2,915. Including the grant from the Francis & Thelma Wise Fund, the Delay the Disease program will receive a total of $7,500.

The Helen Cunningham Handicapped Fund awarded a grant in the amount of $2,096 to the Marion Family YMCA in support of their programming which helps those with disabilities improve well-being.

A grant of $593 was awarded from the Vera O. McDanel Senior Citizens Transportation Fund to Marion Senior Citizens in continued support of senior citizens’ transportation needs.

The 2012 mini-grants include two awards to the American Red Cross of Marion, including $2,200 for disaster communications and $1,500 for a smoke alarm distribution program.

Other mini-grants awarded are:
- $2,500 to Love Inc. of Marion for their Getting It All Together program,

continued on page 3
Acorn Funds Provide a Start

Recently the staff at Marion Community Foundation coined the term “migrating funds” to describe philanthropic funds which were created elsewhere and later transferred to MCF’s stewardship. Another new term is “acorn fund” and it describes a new trend in planned giving — one in which the donor starts with a small gift and a plan to develop a fund over a period of time through additional gifts. Acorn funds can be started at Marion Community Foundation for as little as $100 and exist as a deposit account until the principal reaches the $5,000 minimum for a named endowment fund (or $10,000 in the case of scholarship funds). Once the named fund reaches the required minimum, grants and awards can be generated in accordance with the donor’s planned giving goals.

Several such acorn funds have recently been started at Marion Community Foundation. One of which is the James C. Cooper St. Mary Church Fund. Recently approved by MCF’s board, the Cooper Fund is intended to become a designated fund making grants to the St. Mary Church in support of its elementary school. The donor specified the St. Vincent de Paul Society as an alternate beneficiary of the fund’s future grants. The Cooper Fund was created with a contribution of $100; the donor intends to use his investments to make a large contribution upon his passing. (The fund cannot begin making grants until the fund balance reaches the minimum requirement of $5,000.) The Cooper Fund was established with the assistance of Richard Dixon, one of MCF’s investment advisors.

Another such acorn fund is the Mike & Betty Rogerson Charitable Fund of the Marion Community Foundation. Donor Betty Rogerson started the process with a gift of $100. It is her intention to further develop the fund into a grant making instrument for the benefit of several charities and nonprofit organizations, including: the Marion Palace Theatre Endowment Fund, Thiel College of Greenville, Pennsylvania, the American Red Cross (Marion County Chapter), The Marion Area Humane Society, The Salvation Army’s Marion Community Center, Marion Senior Center, Marion Youth Development Council/Boys & Girls Club of Marion County, and Habitat for Humanity of Marion County.

Grants shall be paid from the fund once the fund balance reaches at least $5,000. The Rogerson Fund is open to additional gifts, not only from the donor, but other interested individuals, organizations, and corporations as well. The Rogerson Fund was established with the assistance of Dan Wigton, one of MCF’s investment advisors.

An example of an acorn fund that is maturing is the Fout-Price Memorial Fund. This fund began as a fund raiser to make charitable donations in memory of accident victims,. Kevin Fout and Jesse L. Price, Jr.

A few years ago, the two area men were killed in an explosion after a welding mishap. Since then, the families and friends have sponsored car shows to raise money and make charitable donations in memory of the deceased men.

The fund started small and has grown to $4,300. With recent gifts, this effort has reached the $5,000 necessary to create a designated fund to benefit Marion General Hospital Hospice. It demonstrates what care and dedication to a cause can do.

Rx Program Has Impact

The United Community Rx Program, an ongoing outreach program funded by Marion Community Foundation and United Way of Marion County, continues to have local impact. This program is administered by Ohio Heartland Community Action.

In September, MCF received a report of a young man who lost insurance eligibility and was facing a crisis of how to pay for a nearly $700 monthly medication he must take for the rest of his life. UCRx was able to coordinate assistance for this young man.

This 20-year-old had been covered on his father’s insurance until his father lost his job due to health reasons. His part-time job provides no health insurance. His father, now on SSDI, has no insurance for his son; furthermore, the young man does not meet the guidelines for Medicaid.

With help from UCRx, his physician’s office and Johnson & Johnson Patient Assistance, he was able to enroll in the Patient Assistance program. He received a pharmacy card for his medicine which is good for one year. He will be eligible to re-apply annually for this program.

With his physician-provided prescription, this young man will be able to receive his medicine on a monthly basis. Additionally, UCRx and Walgreens Pharmacy were able to help the customer with a 14 day supply of his medication while he awaited his pharmacy card to arrive in the mail.

With the help of UCRx and collaborations, this individual will be able to stay on his medication. This is just one example of how UCRx works for Marion residents. Ohio Heartland Community Action estimates that the program will save clients $120,000 in prescriptions in 2012.

Information on UCRx is available by calling 383-7716.

Technology Update

Marion Community Foundation is in the process of developing and launching a new website with the assistance of Stellar Technology Solutions. Stellar’s iPh! Product Suite is being implemented in stages and the latest includes creating a platform in which donors can make online donations to their funds via credit card. Third parties will also be able to make online contributions.

The new system will include the capacity for ACH (automated clearing house) transfers of grant payments, which will add efficiency and security. Another new feature will allow board of trustee members to access policy manuals, board packets, and meeting agendas.

The new website will eventually include a new email address for Marion Community Foundation.
Volunteers return to the church to talk about their projects and learn how lives were touched.

Applications are available at First Nazarene, 233 W. Church St., and painting. In the program’s very first year, 2009, more than end — usually in late August — doing exterior rehab, cleaning, ramps, cleaning gutters, painting homes, and yard cleanup.

Pastor Adam deWeber, Restoration Weekend is a chance for church members to show their love of community. Approximately 700-800 volunteers spend the designated weekend — usually in late August — doing exterior rehab, cleaning, and painting. In the program’s very first year, 2009, more than 100 projects were completed, including building wheelchair ramps, cleaning gutters, painting homes, and yard cleanup.

Beyond the physical work, the weekend also involves nursing home and hospital visits as well as a school supplies and backpack donation project for the Marion City Schools.

A big part of the weekend is after the work is done. Volunteers return to the church to talk about their projects and learn how lives were touched.

Projects are identified through an application process. Applications are available at First Nazarene, 233 W. Church St., and the Marion Senior Center, 2375 Harding Highway East.

### R&C Fund Awards Grants

As is often stressed by Marion Community Foundation’s president, Brad Bebout, many funds, in addition to those which provide the financial backing for the Foundation’s competitive grants program, make annual grant awards — large and small — throughout the year. Most recently, the R&C Fund awarded four significant grants, as follows:

- $1,000 to Christ Deliverance Center for the Martin Lutheran King, Jr. Breakfast,
- two grants of $20,000 each to the James H. Johnson-Charles Rudd Community Complex, Inc. to reduce its remaining mortgage amount,
- $50,000 to the Marion Palace Theatre, and
- $2,000 to Marion First Church of the Nazarene for their Restoration Weekend project.

The R&C Fund is a donor-advised fund focused on improving the quality of life in the Marion area. The Marion First Church of Nazarene’s Restoration Weekend is a prime example of such a project.

Restoration Weekend, now in its fourth year, involves the church’s congregation in a massive volunteer effort. According to Pastor Adam deWeber, Restoration Weekend is a chance for church members to show their love of community. Approximately 700-800 volunteers spend the designated weekend — usually in late August — doing exterior rehab, cleaning, and painting. In the program’s very first year, 2009, more than 100 projects were completed, including building wheelchair ramps, cleaning gutters, painting homes, and yard cleanup.

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### More New Grant Awards

Marion Community Foundation has in its stewardship portfolio more than 150 funds, each of which can make grants throughout the year to fulfill donors’ specific planned giving goals. Three such awards which were recently made include:

- $667 from the Jack & Violet Griffith Fund to the Marion Homeless Shelter,
- $1,177 from the Marion Noon Kiwanis Fund for their scholarship program, and
- $5,000 from the Helen Cunningham Handicapped Fund to Marion Public Health.

Visit marioncommunityfoundation.org and click on “About Us” to learn more about the variety of funds at MCF.

### P.I.T. Stop

**Philanthropic Investment Tips**

by Bradley C. Bebout

You’ve probably read or heard us say Marion Community Foundation creates endowed funds that help donors achieve their charitable goals. Maybe we need to explain exactly what an endowed fund is.

The most important feature of an endowment is that it will last forever. Our donors’ contributions to their funds constitute what is referred to as the principal.

We invest the principal and our Investment Policy tells us how to invest it. Generally speaking, we use the income from the principal to make the charitable grants or scholarship awards that our donors asked us to make.

Our Spending Policy dictates how much each endowed fund can spend each year. The Spending Policy is carefully designed to spend as much as possible to do the good things our donors asked us to do; but, at the same time, our Spending Policy is designed to make certain that we don’t invade the principal over time.

An effective Spending Policy balances two very important goals — spending as much as prudently possible on important charitable causes, but not spending too much so that the principal remains intact. We have good people and effective tools to help us with the balancing act.

Although we take our responsibilities seriously, some time-ly humor from one of my favorite philosophers doesn’t hurt. Mark Twain said, “October. This is one of the peculiarly dangerous months to speculate in stocks in. The others are July, January, September, April, November, May, March, June, December, August, and February.” I assure you, Mr. Twain, that our donors’ funds will be here forever doing the good things important to them and to our community.

Bradley C. Bebout, an attorney since 1980, is President/CEO of Marion Community Foundation.

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Visit marioncommunityfoundation.org and click on “About Us” to learn more about the variety of funds at MCF.
New MCF Board Officers Elected

The 15-member Board of Trustees for the Marion Community Foundation annually elects officers to guide the actions of the board. Newly elected officers include:

Sue Jacob -- Chair -- has served on the board since 2007. She also serves on the Executive Committee, Scholarship Committee, and the Governance & Policies Committee. Sue is a sixth grade teacher at River Valley Middle School.

James Barney -- Vice Chair -- has served on the Board since 2008. He also serves on the Executive Committee, Marketing Committee and Grants Committee. He is the superintendent of the Marion City Schools.

Susie Brown -- Secretary -- has served on the Board since 2008. She also serves on the Executive, Audit and Grants committees. Susie is the Director of Pharmacy Services for Smith Clinic and Walgreens Pharmacy.

Charles Garvin -- Treasurer -- has served on the Board since 2009. He also serves on the Executive and Investment committees. Dr. Garvin is an ophthalmic surgeon and physician executive at OhioHealth Marion Area Physicians.

Larry Geissler -- Immediate Past Chair -- has served on the board since 2007. He also serves on the Executive, Scholarship, and the Governance and Policies committees. He is retired from Fulfillment Corporation of American (later known as Kable Fulfillment) where he worked in operations management, finance, and budget.

Other board members include: Rex Parrott, Ronald D. Cramer, Pastor Doug Ford, Ted Graham, Judge Thomas K. Jenkins, Tom Johnston, Nicole Workman, Megan Queen, and Dr. Scott Yancey. The board will soon elect a replacement for Anne Davy, who recently retired from the Board after 9 years of service.

MCF Represented on AG’s Charitable Advisory Council

As post-election emotions settle to a simmer, it may be good to know that Marion Community Foundation is appreciated in non-partisan circles. This past month, MCF president Brad Bebout was reappointed to the Ohio Attorney General’s Charitable Advisory Council. First appointed in 2009, by then-Attorney General and Democrat Richard Cordray, Bebout has been reappointed this year by Cordray’s successor, Republican Mike DeWine.

The Charitable Advisory Council advises the Attorney General on issues related to charitable organizations. In particular, the council examines the training and educational needs of charitable organizations, develops model policies related to governance and administration of charitable organizations, and identifies emerging issues and trends affecting charitable organizations.

Bebout is one of 14 professionals on the Council, one of three representing a foundation. According to DeWine’s letter, Bebout appointment is based on Bebout’s expert knowledge, experience, and thoughtful insight.

This state-level relationship has born fruit in facilitating referrals and action which has benefitted charitable organizations in the Marion community. Bebout says, through this position, he is able to directly help charities in Marion County and be their voice at the state level.