In 2021, as the pandemic ebbed and surged, generosity was one thing that remained, not only constant, but increased. Marion Community Foundation experienced the third largest year of contributions in the Foundation’s 23 year history, receiving 898 gifts totalling in excess of $3.5 million and the welcome addition of 39 new funds. Donations came in many forms, from touching memorial gifts and generous bequests to major gifts and creation of several impressive new funds (see page 12, where we recognize the year’s donors). Of the nearly 900 individuals and organizations who contributed to Marion Community Foundation in 2021, 703 of those gifts were under $1,000, demonstrating both that no gift is too small and that together we can do great things. It is proof that we live up to our middle name, “community.”

One of those new funds, a decade in the making, is the Mike & Betty Rogerson Charitable Fund.

Ten years ago, with only $100, Mike and Betty Rogerson’s legacy was created. They established a charitable fund at Marion Community Foundation so that, when they were gone, the causes they cared about would continue to be

per·se·ver·ance /pərˈsərˌvərəns/noun

persistence in doing something despite difficulty or delay in achieving success.
What a year for resiliency!

It’s been another challenging year for everyone, but the spirit of America – and the spirit of Marion – remains strong. Marion Community Foundation also thrived in 2021. In fact, this past year marked the highest total of contributions to the Foundation in a single year, excluding the two years in which we received multi-million dollar donations from the estates of Bob & Dorothy Wopat and Joe Slanser! As usual, we’ve listed our donors in the pages of this Annual Report and we thank all of you for your support.

Why do I think the donations were so significant during another year of challenging times?

I recently saw the following quote by Aubrey Hirsch:

“If you don’t feel equipped to improve your own life as we head into this new year, maybe you can find a way to improve someone else’s.”

I think that’s what many of us have tried to do during the last couple of years. I think we all realize that we always feel better about ourselves after we help someone else – whether that’s through donating your time, or your talents, or your treasures. Donations made to Marion Community Foundation directly improve the lives of others in our community. Just take a look inside these pages to see all the good your community foundation is doing. After doing so, I know you’ll feel satisfaction about the way your contributions have found a way to improve someone else’s life.

Best Wishes for 2022

& Be Well
Rogersons Care for So Many

Continued from cover | supported. Today, in 2022, their fund is worth $1,447,000, placing it in the top 10 gifts received by Marion Community Foundation.

This designated fund was created in 2012 to support a number of charities important to the couple – the Marion Palace Theatre, the Marion chapter of the American Red Cross, Marion Area Humane Society, The Salvation Army, Marion Senior Center, Marion Youth Development Council, Boys & Girls Club, Buckeye Ridge Habitat for Humanity, and Thiel College in Greenville, Pennsylvania.

“The Rogersons’ fund is significant for a number of reasons,” said Marion Community Foundation’s President and CEO, Dean Jacob. “The size of the gift notwithstanding, this fund illustrates how easy it is to be generous (only $100 to start a fund), it honors the couple who created it, and it will last forever by awarding grants in their name for generations to come.”

Mike, who passed in 2010 at the age of 80, made a lengthy career with Ohio Edison. He originally hailed from Massachusetts and earned his electrical engineering degree from Youngstown State. He and Betty married in 1952. Mike was an active member of St. Mary Church and held memberships in the Knights of Columbus, Marion Country Club, and the Elks.

Betty was an avid golfer, playing countless rounds at the Marion Country Club. She enjoyed bowling, the Artisans Guild, and volunteering at the former MedCenter Hospital gift shop. She was a faithful member of Trinity Baptist Church. Born in Greenville, Pennsylvania, she graduated from Theil College there, hence the designation of her alma mater as one of the recipients of her charitable fund at Marion Community Foundation.

As a couple for 58 years, Betty and Mike traveled extensively throughout the United States, Europe, Ireland, and Asia. They enjoyed wintering in Venice, Florida.

Betty lived to 96 years of age. When she passed in 2020, Mike and her charitable planning, assisted by their financial advisor, provided for a major gift from their estate to Marion Community Foundation, turning that little $100 fund into a major, charitable endowment.

Planned giving refers to any charitable gift that requires thought and planning. It is more than a mere donation. It establishes a legacy and tells the world about you, what is important to you, and what matters in your life. This is what the Rogersons chose to do and we hope it inspires others to look deep into their hearts and determine the mark they wish to leave on this world.

New Funds in ‘21

Marion Community Foundation welcomed the following new funds in 2021, supporting causes as diverse as the donors who created them. More details are available on the “Our Funds” page of our new website, under the “Give” tab, at www.MarionCommunityFoundation.org.

Designated
Jerry & Barb Baker Family Fund Supporting the Marion Palace Theatre | Jerry & Barb Baker

John & Carol Boblenz Epworth United Methodist Church Fund, John & Carol Boblenz Shriners Hospital Fund, and John & Carol Boblenz YMCA Fund Supporting Epworth United Methodist Church, Shriners’ Hospital for Children, and the Marion Family YMCA, respectively | John & Carol Boblenz

Richard L. Borland Fund Supporting the Prairie Parks Foundation and Marion County Parks District | Jef Lamb

Marion CAN DO! Fund Supporting economic development in Marion, Ohio | Daniel Burkhart

Cooper-Donaldson Terradise Nature Center Fund and Cooper-Donaldson Prairie Parks Fund Supporting the Terradise Nature Center & Prairie Parks Foundation, respectively | Mary Donaldson & Dick Cooper

Rebecca S. Craig Family Education Fund Benefitting the School Matinee Series of the Marion Palace Theatre | Rebecca S. Craig

Developmental Disabilities Fund Supporting the Marion County Board of Developmental Disabilities | Friends of MCBDD

Key
 legacy fund-to be fully funded through planned giving
 non-endowed fund
 acorn fund-created with a plan to be fully funded at a future date
 continued next page
New Funds in ’21

Continued from previous page

Phil & Sonia Haas Pleasant Athletic Boosters Fund, Phil & Sonia Haas Palace Theatre Fund, Phil & Sonia Haas Historical Society Fund, and Phil & Sonia Haas Teachers Fund

Supporting Pleasant High School athletic, the Marion Palace Theatre, Marion County Historical Society, and Marion County teachers, respectively | Phil & Sonia Haas

Knowledge Academy Education Fund
Supporting educational services for schools, districts, preschools/daycare, elder care, and organizations which serve youth, elderly, and the disabled | Bishop Gregory Draper

Randy & Sandra Winland Marion County Historical Society Fund
Supporting the Marion County Historical Society | Randy & Sandra Winland

Agency

Marion Technical College Foundation Funds:
- Education Equity Fund, Douglas & Virginia Geib Fund, and Dr. David & Alice Bailey Fund
- Supporting Marion Technical College

Donor Advised
The following funds were created to support to a variety of charitable causes as directed by their donors and fund advisors.

- Jeremy P. Dunn Fund | Jeremy Dunn
- Toney & Winders Families Fund | Jeremy Dunn
- Jack & Marilyn Andrews Family Fund | Children of Jack & Marilyn
- Loudenslager & Zucker Family Fund | Roy Loudenslager

Field of Interest

Cooper-Donaldson Parks & Environment Fund
Supporting programs & organizations which promote and protect the environment in Marion, Morrow, Crawford, and Wyandot county parks | Mary Donaldson & Dick Cooper

Jane Ann Caton Dean Fund
Benefitting programs which support people with disabilities, ages 13-21 | John Dean

Pillar Credit Union Morrow County Teachers’ Fund
Supporting the TEACH Grants Program for Morrow County teachers | Board of Pillar Credit Union

Scholarship

Dr. David & Alice Bailey Scholarship Fund
Supporting students of Tri-Rivers Career Center pursuing careers in trades, apprenticeship, and skilled labor | Dr. David & Alice Bailey

Marion Rotary Club James M. Bazzoli, MD, Scholarship Fund
Supporting Marion students pursuing degrees in healthcare at Ohio State Marion or Marion Technical College and who intend to remain in Marion | Dr. Jim & Ellen Bazzoli

Claridon Alumni Association Scholarship Fund
Supporting seniors and graduates of River Valley High School, especially those pursuing the fields of engineering, health care, or education | anonymous

Rebecca S. Craig Scholarship Fund
Supporting seniors and graduates of Ridgemont High School pursuing degrees in allied health, music, or horticulture | Rebecca S. Craig

Dr. Noel & Maria Eboh Family Scholarship Fund
Supporting higher education for Marion County seniors and graduates | Dr. Noel & Maria Eboh

James Flickinger Memorial Scholarship Fund
Supporting seniors of Pleasant High School with GPAs of 3.0+ | Family of James Flickinger

Bonnie L. Lamb Scholarship Fund
Supporting seniors and graduates of Marion County high schools to attend Marion Technical College and major in business | Jeff Lamb

Marion Music Club Scholarship Fund
Supporting Marion County students pursuing careers in music and music education | Marion Music Club

Wesley & Karen Schertzzer Memorial Scholarship Fund
Supporting seniors and graduates of Pleasant and Ridgedale high schools in memory of Wesley & Karen | Jim & Stephanie Schertzzer and Bob & Kay Rush

Elizabeth Shumaker Scholarship Fund
Supporting female students of River Valley High School who demonstrate a diversity of extracurricular activities and well-rounded leadership skills | Diann Cage

Unrestricted

Donald & Barbara Everly Family Fund
Supporting charitable causes in Marion, Ohio | Donald & Barbara Everly

Marion Board of Realtors Fund
Supporting charitable causes in Marion, Ohio | Marion Board of Realtors

Randy & Sandra Winland Fund
Supporting charitable causes in Marion, Ohio | Randy & Sandra Winland

Key

- Legacy fund-to be fully funded through planned giving
- Acorn fund-created with a plan to be fully funded at a future date
- Non-endowed fund

Let’s Stay in Touch

If you have changed your email address, please let us know so we can update our records and get news to you quickly. Simply email Loris@marioncommunityfoundation.org and type “Update Email” in the subject line so we can record your email address.

You can join our email list to be among the first to receive our news updates. Go to our sign-up page at: marioncommunityfoundation.org/about/contact/

We regularly post to Facebook, Twitter, Instagram, and LinkedIn. And, we have a group page on Facebook, Friends of Marion Community Foundation.
2021 Donor Advised Funds

Don & Deb Alspach Fund
Ray & Charlotte Baldauf Fund
Marion County Bar Association Fund
Bebout Family Fund
David R. Campbell & Diane K. Campbell Charitable Fund
Maurice & Jeanne Cornell Memorial Fund II
W. M. Kay Davis Fund
Randy & Rosalie Sauro Drazba Fund in Memory of Carmella Sauro
Noel & Maria Eboh Family Fund
Ellie Mae Donor Advised Fund
Walter Linn & Colleen Fiant Fund
Malcolm & Kathy Goodman Fund
Dr. Robert & Christine Haas Family Fund
Hall Economic Development Fund
Chief Jack Holiday Memorial Fund
Mary H. Hollaway Donor Advised Fund
Dean & Sue J. Jacob Fund
George & Norma J. Jacob Charitable Fund
KSAN Charis Fund
Loudenslager Agricultural Leadership Fund
Ila Madia Charitable Fund
Fred & Joan Manter Fund
Marion Community Development Fund
Marion Education Foundation Fund
Marion Historical Site Visit Fund
McClellen Family Fund
Parrott Family Fund
Tracy & Seth Pearch Fund
Kathy & Bradley Ridge Family Fund
Richard & Mildred Rinehart Fund
Ron & Laura Scharer Fund
Tom & Cindy Schifer Family Fund
Sherard-Melhuish Fund
Dalton Sipes Peace Fund
Stuckey Family Fund
Henry A. True Trust Fund
Roger & Janice Vanover Family Fund
We Remember Al Fund
Wheatstone Financial Fund
Beverly S. Young Fund
Youth Engaged in Philanthropy Fund
S. Fredrick & Suzanne Zeigler Charitable Fund

Causes Supported by our Donor Advised Funds

American Red Cross-Marion Chapter
Boys and Girls Club of Marion | Black Heritage Council | The Cardinal Project
DaySpring Wesleyan Church | Downtown Marion, Inc. | Dusty Trails 4-H Club | Emanuel Lutheran Church
Explore-It-torium | First Presbyterian Church
Marion Adolescent Pregnancy Program | Marion Area Humane Society
Marion City Police Department K-9 Unit
Marion City Parks Department/Lincoln Park baseball facilities
Marion City Schools & Mary Ellen Withrow HS Academy
Marion County Federation of Womem’s Clubs | Marion County Historical Society
Marion County Land Reutilization
Marion Family YMCA
Marion Matters | Marion Noon Kiwanis Club scholarships | Marion Palace Theatre
Marion Shelter Program | Mobile Meals of Marion County | Mt. Vernon Ave. Church of Christ | Mt. Zion Missionary Baptist Church Tiny Homes
New City Fellowship Church | Ohio History Connection | Ohio Health Foundation | Pleasant Athletic Boosters Club
Prairie Parks Foundation/Tallgrass Trail | River Valley Teachers Fund
Salvation Army | scholarships
St. Mary Church | St. Vincent de Paul Society | Stengel True Museum | Tri-Rivers Career Center’s Drug Free, Hire Me & Paramedicine programs
Trinity Baptist Church

Support What You Love with a Donor Advised Fund

Various of our donors with Donor Advised Funds recommended awards in support of the Rotary Centennial Playground at McKinley Park. This much larger and all-inclusive playground replaced the much beloved Project Playground at the end of its 26-year life. The new playground was opened to the public in November 2021. Funding was provided by the McClellen Family Fund, Whetstone Financial Fund, & Beverly S. Young Fund as well as $114,000 in Community Grants.

Donor Advised Funds (DAF) are for the donor who wishes to be actively involved in his or her philanthropy. These donors recommend awards from their fund(s) to Marion Community Foundation’s Board of Directors.

Donor Advised $154,000+

Several of the causes supported by our Donor Advised Funds included:

- Salvation Army
- St. Mary Church
- St. Vincent de Paul Society
- Stengel True Museum
- Tri-Rivers Career Center’s Drug Free, Hire Me & Paramedicine programs
- Trinity Baptist Church

Support What You Love with a Donor Advised Fund
Marion Community Foundation had a record year in 2021—the third highest contribution year on record, highest number of gifts, and the most new funds created in a single year. All of these increases mean more work for the staff. To address growth, two of the part-time staff member were made full-time, bringing to five the number of full-time staff at the Foundation.

The staff members are Operations Manager, after seven years on staff and 10 years as communications consultant. In addition to Dean Jacob, President & CEO, and Julie Prettyman, Vice President and Director of Programs, full-time staff includes Diana Rinesmith, who has been with the Foundation for 20 years and was promoted to Operations Manager. Diane Mault has been the contracted bookkeeper for 23 years. John Colla, Larry Carone, and Joe Adams of Clearstead Advisors provide investment services.

### Designated $603,000+

Designated funds allow donors to annually support a specific nonprofit, charity, or cause in perpetuity.

#### Animal Care

- Mary H. Hollaway Humane Society Fund, $4,296, Marion Area Humane Society
- Mike & Betty Rogerson’s Charitable Fund, $1,368, Marion Area Humane Society

#### Arts, History & Culture

- Jerry & Betty L. Davis Palace Theatre Fund, $5,209, Marion Palace Theatre
- Gene & Jan Farison Family Fund, $260, Palace Cultural Arts Association
- F. Riley Hall & Geraldine A. Hall Memorial Fund, $1,510, Stengel True Museum
- Don & Peggy Hall Family Fund, $211, Palace Cultural Arts Association
- A. Merle Hamilton Fund, $15,980, Marion County Historical Society
- Warren G. Harding Home & Presidential Center Endowment Fund, $4,227, Ohio History Connection
- Mary H. Hollaway Palace Theatre Fund, $4,303, Palace Cultural Arts Assoc.
- Huber Museum Fund, $427, Edward Huber Memorial Association
- Linn School Endowment Fund, $1896, Marion County Historical Society
- Kenny Martin Charitable Fund, $1,358, Palace Cultural Arts Association; $1,358 Marion Union Station Assoc.
- Merydeth & J ohn McDaniel Fund, $10,000, Palace Cultural Arts Assoc.
- David K. Miller Fund, $194, Marion County Historical Society
- Palace Perpetual Care Fund, $33,245, Marion Palace Theatre roof project; $10,800, sound system replacement
- Poorman Palace Theatre Fund, $4,60, Palace Cultural Arts Association
- Charles Ransome Student Music Fund, $875, Elgin Music Boosters Association
- Mike & Betty Rogerson’s Charitable Fund, $2,737, Marion Palace Theatre
- Joe Sianser Marion Union Station Fund, $46,898, Marion Union Station Association
- SSG Shannon M. Smith “No Fear” Fund, $3,154, Ohio Fallen Heroes Memorial
- Stevenson, promoted to Community Relations Manager, after seven years on staff and 10 years as communications consultant.

#### Community Development

- Ida Barlow Brilliance Award Fund, $208, Marion County Federation of Women’s Clubs
- Betty L. Davis Fund III, $252, Marion League of Women Voters
- Jo Ann Radwin-Zimmerman Bridge Out of Poverty Fund, $10,34, Marion Matters

#### Education

- Jacob R. Cannon Memorial Fund, $403, Ridgedale Local Schools
- Stephen J. Chaney Memorial Scholarship Fund, $2,968, St. Mary School
- James C. Cooper’s St. Mary Church Fund, $2,245, St. Mary School
- Farison Family Helping Hands Fund, $1,027, Pleasant Local Schools
- Let’s Read 20 Endowment Fund, $248, Marion Public Library
- Marion Public Library Endowment Fund, $440, Marion Public Library
- Pleasant Music Boosters Fund, $413, Pleasant Music Boosters
- Prexy Play Scholarship Fund, $535, Marion Harding High School
- Arthur J. & J o Ann Radwin Journalism Fund, $10,44, journalism education
- Jean Zoeller Reas Endowment Fund, $2,878, St. Ursula Academy; $2,877, Colvert High School
- Mike & Betty Rogerson’s Charitable Fund, $2,737, Thiel College
- Judge W illiam W iedemann Family Fund, $999, Marion Technical College; $999, Ohio State Marion

#### Children, Families & Seniors

- Marion Family YMCA “Doc” Butterworth Scholarship Fund, $354, Marion Family YMCA
- Nobel F. Hollaway YMCA Scholarship Fund, $4,313, Marion Family YMCA
- Merle & Evelyn Lashey YMCA Fund, $2,152, Marion Family YMCA
- Mike & Betty Rogerson’s Charitable Fund, $1,368, Marion Senior Citizens Assoc.; $1,368, Marion Youth Development Council/Boys & Girls Club
- Dan Zimmerman & J o Ann R. Zimmerman YMCA Fund, $2,078, Marion Family YMCA
- Warren G. Harding Home & Presidential Center Endowment Fund, $4,227, Ohio History Connection
- Let’s Read 20 Endowment Fund, $248, Marion Public Library
- Marion Public Library Endowment Fund, $440, Marion Public Library
- Pleasant Music Boosters Fund, $413, Pleasant Music Boosters
- Prexy Play Scholarship Fund, $535, Marion Harding High School
- Arthur J. & J o Ann Radwin Journalism Fund, $10,44, journalism education
- Jean Zoeller Reas Endowment Fund, $2,878, St. Ursula Academy; $2,877, Colvert High School
- Mike & Betty Rogerson’s Charitable Fund, $2,737, Thiel College
- Judge W illiam W iedemann Family Fund, $999, Marion Technical College; $999, Ohio State Marion

### Staff: Familiar Faces, New Titles

Conley, Kathy, Assistant bookkeeper for 23 years. John Colla, Larry Carone, and Joe Adams of Clearstead Advisors provide investment services.
Faith-Based
Epworth United Methodist Church Endowment Fund, $2,079, Epworth United Methodist Church
Gene & J an Farison Family Fund, $259, Epworth United Methodist Church
A. Merlie Hamilton Fund, $15,974, Central Christian Church; $15,973, Epworth UMC; $16,073, Centenary United Methodist Church
J ane Laucher’s Emanuel Lutheran Church Fund, $29,266
Emanuel Lutheran Church
Lust Family Fund, $817, Emanuel Lutheran Church
Meredythe & J ohn McDaniel Fund, $2,838, Epworth UMC
Parrott Family Emanuel Lutheran Church Fund, $224, Emanuel Lutheran Church
J ean Zoeller Reas Endowment Fund, $2,677, St. Mary Parish, Tiffin, OH
Joe Slsnser Epworth United Methodist Church Fund, $93,907, Epworth UMC
William D. & Alice L. Young Fund, $401, First Church of the Brethren
Daniel H. Zimmerman Presbyterian Church Fund, $10,341, First Presbyterian Church of Marion

Health & Wellness
Betty L. Davis Fund, $208, Marion Area Counseling Center
Fout-Price Memorial Fund, $18,961, Marion General Hospital Hospice
Glady s Simpson and Melvin Uler y Memorial Fund, $13,981, Center Street Community Health Center
Sutherin Family Eye Care Fund, $5,479
Center Street Community Health Center ophthalmic services
W opat Family YMCA Fund, $150,000, Marion Family YMCA

Food, Shelter & Support
Mike & Betty Rogerson’s Charitable Fund, $1,368, American Red Cross, Marion Chapter; $1,368, Salvation Army’s Marion Community Center; $1,368, Buckeye Ridge Habitat for Humanity
Gene & J an Farison Family Fund, $259, United Way of Marion County
J ack V. & Viole t M. Grif th Family Fund, $931, Marion Shelter Program
Norma J acob St. Vincent de Paul Society Fund, $504, St. Vincent de Paul Society food pantry
Leapin’ Outreach Center Fund, $214, Leapin’ Outreach Center

Legal Aid Society Endowment Fund, $275, Legal Aid Society Marion Branch
Marion Matters Endowment Fund, $280, Marion Matters
Marion County Red Cross Endowment Fund, $430, Marion County Red Cross
Thomas E. Ruzzo Endowment Fund, $1,596, Marion Family Court/Family Resource Center
Pamela Stone United Way Impact Fund, $463, United Way of Marion County
J udge W illiam Wiedemann Family Fund, $1,333, United Way of Marion County

Parks & Environment
Don & Deb Als pac h Fund, $581, Prairie Parks Foundation
Dr. & Mrs. Glen Burton J r Memorial Fund, $464, Prairie Parks Foundation
J erry Davis Prairie Parks Foundation Fund, $1,315, Prairie Parks Foundation
T erradise Nature Preserve Fund, $1,867, Prairie Parks Foundation

Thanking Our Local Financial Advisors for supporting the publication of this 2021 Annual Report.

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Richard Dixon, Managing Director
Brian Dixon CFP®, Senior Vice-President
Alan Dixon, Senior Vice-President
740-387-0111

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Amy M. Fredritz
352 McMahan Blvd., Marion, OH
740-389-6823

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Have an idea for a charitable fund? Call us! 740-387-9704

7
Community Grants Program $753,000+

Our Community Grants Program makes annual awards from a variety of Marion Community Foundation’s charitable funds to local nonprofits through a competitive application process. The 2021 Community Grants include:

American Red Cross-East Central Ohio, $7,800, Blood Saves Lives - Helping People with Sickle Cell
Black Heritage Council, $10,000, It Takes a Village
Boys & Girls Club of Marion County, $62,500, capital improvements; $35,000, Formula for Impact
Buckeye Ridge Habitat for Humanity, $17,000, Breaking Barriers to Black Homeownership
Center Street Community Health Center, $50,000, Community Resource Center
Cents for Shoes, $5,000, operations
Explore-it-atorium Children’s Museum, $6,100, Back to Basics
For The Children, $5,000, Mentoring Club
Heart of Ohio Homeless Shelter, $25,000, program operations
Huber Memorial Association / Huber Machinery Museum, $10,000, museum entrance improvements
Knowledge Academy Educational Services, $50,000, Brown-Draper-McGee Life Center capital project
LifeCare Alliance, $15,000, Marion County Meals-on-Wheels
Luke 3:11 Ministries, $3,800, operations
Marion Adolescent Pregnancy Program, $7,700, Changes & Choices education program
Marion Concert Band, $2,500, community performances
Marion County Board of Developmental Disabilities, $13,700, Family Support Group; $7,800, School Age Respite
Marion County Historical Society, $41,648, Guarding our Mission: Collecting, Preserving & Sharing
Marion Family YMCA, $22,250, Marion Mentors 2021-2022 School Year; $39,700, Summer Camp Partnership 2022
Marion Matters, $24,250, Hope Center
Marion PEP Club, $53,000, Laying the Foundation - McKinley Park/Marion Rotary Centennial Playground Second Phase
Marion Public Library, $9,100, Let’s Read 20: It’s a (Book) Walk in the Park
Marion Technical College, $5,000, Expanding access for disability students; $8,000, Student Connections Center/Believe In Students program
Marion Victim Assistance Program, $8,000, program operations
Marion Voices Folklife + Oral History, $32,000, Marion Voices: 2021-2022 Folklife Transmission Educational Outreach Program
Mid Ohio Fine Art Society, $4,000, Youth Outreach Program
Mobile Meals of Marion County, $10,075, Meal Assistance Program
Ohio Heartland Community Action Commission, $7,500, United Community Rx Program
Ohio History Connection, $31,250, Harding Home Project 2020; $5,200, Laddie Boy Mystery Club

Palace Cultural Arts Association, $90,000, sound system replacement
Peace & Freedom Committee, $7,500, Central Ohio Regional Oratorical/Art/ Poetry/Essay Contest
Salvation Army of Marion, $7,000, Mobile Service Unit
St Vincent de Paul Society, $2,000, food pantry
Wings of an Angel, $6,100, Special Equipment for Special Children; $5,800, RISE Adult Day Services

Follow Us

A Racial Equity & Justice grant to the Marion Public Library helped bring NYT best selling author Nic Stone to Marion for the Peace and Freedom Committee’s MLK Breakfast and Awards. Stone’s message to the youth of our community was to dream big and find something to do that you love.

Racial Equity & Justice Grants Program

In its inaugural year, the Racial Equity & Justice Grants Program awarded six grants to Marion area organizations seeking to address issues of equity in the community. This successful program will be continued in 2022. Visit our website and click on the ‘News’ tab to learn more.

Black Heritage Council of Marion County, $4,250, Umoja (Community) neighborhood revitalization in northwest Marion
Knowledge Academy Education Services, $16,000, Harmony Camp to teach respect and equality to a new generation
Marion County Family Court, $3,000, cultural literacy, anti-racism and implicit bias training for all Court employees
Marion Family YMCA, $13,000, to expand equity and justice capacity by educating YMCA partner organizations
Marion Public Library, $6,250, Peace and Freedom annual breakfast speaker on Martin Luther King Jr. Day, author Nic Stone
St. Mary Catholic Church, $5,000, Latino Health Fair and Hispanic Heritage Month; $2,500, summer enrichment program for Hispanic children in LaRue and New Bloomington
What is Remembered, Lives

If you look, you’ll see that five of the largest gifts received in 2021 were from estates or in memory of a loved one. It’s an honor and a privilege when we get to help someone create an endowment at Marion Community Foundation as a lasting legacy to a life well-lived. What you may not know is that planning such a philanthropic legacy with us is easy and free.

Sure, some estate plans can be complex and no one likes to ponder the inevitable, but talking with an attorney and professional advisors to create your estate plan is both necessary and easier than you might imagine. Including Marion Community Foundation as a beneficiary to your estate plan can, in some cases, simplify matters for your heirs and provide tax savings for them.

We’ll work with you and your attorney to include the simple language necessary to start an endowment fund with us.

Start by meeting with our President and CEO Dean Jacob and discuss your charitable plans. If you already have a fund with us, it is extremely easy to add a simple clause to your will or trust. If you want to start a new fund, that’s easy, too, requiring only a couple more steps. Even easier is naming Marion Community Foundation as a beneficiary to any of your bank or investment accounts, retirement plans, or insurance policy.

Setting up a planned gift means you don’t have to make a large donation now, because the charitable gift occurs after you pass. And, one of many perks a community foundation of ers to people is the assistance and means to create a lasting, philanthropic legacy at no expense to you.

Schedule a time to visit by calling 740-387-9704.

Part of History  Marion Community Foundation is a major supporter of the Harding Presidential Sites, from the groundbreaking to today, providing $500,000 toward this monumental project. The Harding Presidential Library and Museum is a new town jewel with Smithsonian-quality exhibits and a research library. The Home has been restored to its appearance during the 1920 presidential campaign. You can support Marion history by donating to the Harding Presidential Endowment Fund at Marion Community Foundation, which provides for future maintenance and upkeep of the facilities.

Field of Interest $69,000+
Field of Interest Funds are created by donors who have a particular cause that is near to their heart and want to support a variety of organizations who do good work in that area. In 2021, these grants included:

- Dave & Anne Brown Family Fund, $524, Marion Family YMCA Parkinson’s disease programs
- Child Care Choices Fund, $1,290, Emanuel Lutheran Preschool & Daycare
- James & Margaret Coulson Charitable Fund, $573, Marion Family YMCA Parkinson’s disease programs
- Health Care Fund, $12,250, Marion Family YMCA child care expansion
- Helen Cunningham Handicapped Fund, $5,000, Center Street Community Health Center; $2,154, Marion County Board of Developmental Disabilities (MCBDD)
- Jerry Grubaugh Memorial Fund, $4,573, healthcare in the Dominican Republic
- Virgil Jerome Nature Education Fund, $505, Prairie Parks Foundation
- Marion Noon Lions Club Fund, $2,326, Prevent Blindness Ohio Affiliate
- Marion Speech and Hearing Fund, $11,967, MCBDD speech, language, and hearing services
- Vera O. McDanel Senior Citizens Transportation Fund, $530, Marion Senior Center
- Kathleen E. O’Shea Fund, $7,315, musical productions at Marion Palace Theatre and all Marion high & middle schools
- Prospect SUNSWIM Pool Fund, $10,180, Village of Prospect
- Smith-Brown Family Fund, $1,403, Marion Family YMCA Parkinson’s disease programs
- Janis & Greg Sوهston Family Fund, $457, Marion Public Library
- Francis & Thelma Wise Fund, $2,100, Marion Family YMCA arthritis programs; $2,100, Marion Family YMCA orthopedic therapy
- Part of History Marion Community Foundation is a major supporter of the Harding Presidential Sites, from the groundbreaking to today, providing $500,000 toward this monumental project. The Harding Presidential Library and Museum is a new town jewel with Smithsonian-quality exhibits and a research library. The Home has been restored to its appearance during the 1920 presidential campaign. You can support Marion history by donating to the Harding Presidential Endowment Fund at Marion Community Foundation, which provides for future maintenance and upkeep of the facilities.
HOW TO USE

DONOR DASHBOARD

Have you established a charitable fund at Marion Community Foundation? Are you curious about the current value of that fund? Wondering about recent donations? How about grants or scholarships awarded from it? All of this information is available to you 24/7 on our website. Although we are always happy to talk to you, you can get all of this information—and more—through the “Donor Dashboard” at www.MarionCommunityFoundation.org. Here’s a primer:

- Visit our website: www.MarionCommunityFoundation.org
- Hover over the LOGIN button
- Slide to the option that says DONOR LOGIN & click

- On the Login Page, enter your User Name & Password
- Click the brown LOGIN button.

If you have questions, need assistance with your login credentials, or want help logging in for the first time, call 740-387-9704.

Welcome! You are now logged in.

You will see:
- your fund name & balance
- grant history
- contributions
- activity by date-range

If you have more than one account, you can switch by clicking on “Change Account” beside the name of the fund you are currently viewing.

Use the drop-down menu at the TOP for:

FUND ACTIVITY
- fund financial snapshot
- incoming contributions
- out-going grant awards
- investment earnings

CONTRIBUTE TO THIS FUND
- add to your fund(s) via credit card

CONTRIBUTION ACTIVITY
- your contributions
- gifts from family & friends
- save/print records on your home computer

GRANT HISTORY
- awards (grants or scholarships) made from your fund

MY PROFILE
- your contact information
- change password

When finished, click LOG OUT at the very top of the page.

If you are affiliated with a nonprofit with an Agency Fund, you can access account details in this same way via the ORGANIZATION DASHBOARD.
In 2021, the Teaching, Educating And Classroom Help (TEACH) Grants Program awarded six grants to educators in Marion. In 2022, thanks to a new fund, the Pillar Credit Union Morrow County Teachers Fund, the program will be open to two counties. Visit our website and click on the ‘News’ tab to learn more.

**Tri-Rivers Career Center**, $10,500, upgrade specialized equipment for the school’s Swivl system, allowing Tri-Rivers’ teachers to share, edit, and provide live videos for both the career technical and academic classrooms.

**Elgin Middle School**, $700, Design Thinking Kits to provide hands-on activities in a variety of STEM areas designed to solve life problems and challenge students in the fields of forensic science, engineering and STEM careers.

**Elgin Middle School**, $1,350, Green Screen Video Project to create a green screen area for the school’s Digital Media Center, providing students with instruction in video recording, script writing, set design, news casts, and editing.

**Marion City Schools/Harding High School**, $2,250, Alcohol and Drug Impairment Program for 400+ Harding freshmen and blended learning students using a unique and effective program called Fatal Vision.

**Pleasant High School**, $594, BreakoutEDU, a subscription and physical kit to enhance social studies content with escape room-style learning and an emphasis on communication, collaboration, critical thinking, and creativity.

**Marion City Schools/Harding High School**, $2,380, technological archiving equipment for the popular History of Marion, Ohio, class. Students will learn about the importance of archiving, proper methods, and exploration of area history.

**Marion City Schools/Harding High School**, $2,250, replacement and purchase of a new drum set and traveling cases for the music department.

**River Valley Liberty Elementary**, $1,290, iPads and Apple Pencils for teachers, enabling them to incorporate more classroom technology and create more interactive lessons.

**River Valley Heritage Elementary**, $500, expand classroom book collection with a variety of titles, genres, and characters to motivate students to become life-long readers.

---

**Boys & Girls Club Endowment Fund**

**Emanuel Lutheran Church Funds**: honoring Elsie L. Ackerman, Marion L. Apple & Thomas James Helwig, Lester P. DeLong, Charlotte E. Dennison & Alvin K. Sanford, Norman & Donna Ruth Fogt, Dorothy M. Hall & Donald F. Ulrich, Rita M. Herbst, Robert & Margaret Mather, and Caroline L. Ulsh, as well as their Good Samaritan and Radio funds.

**Father Fred Furey Fund** for Marion’s Catholic Schools.

**Don & Betty Jerew’s Emanuel Lutheran Church Fund**

**Marion Area Humane Society Endowment Fund**

**Marion County 4-H Endowment Fund**

**Marion County Children’s Home Endowment Fund**

**Marion Goodwill Endowment Fund**

**Marion Harding Athletic Booster Club Fund**

**Marion Shelter Program Organizational Endowment Fund**

**Marion Senior Center Endowment Fund**

**Marion Technical College Foundation Funds**: Dr. David & Alice Bailey Fund BMA Technologies Fund Warren & Jan Brown Fund Bryson Family Leadership Fund Betty M. Dietsch Fund Joey Draper Fund Education Equity Fund Gary Ellis Business Builders Fund

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**5 Reasons to Support a Nonprofit’s Endowment Fund**

- An endowment provides a dependable source of income, helping sustain organizations during difficult times.
- You’re truly passionate about a nonprofit and want to ensure its success today and for years to come.
- An endowment fund can help an organization strengthen its mission by providing extra funds to address unanticipated need or projects.
- A gift to an endowment has more value than a one-time gift - over 20 years, a $10,000 gift is projected to make $12,000 in awards AND grow the principal to $15,000.
- A planned gift to an endowment can be more than a gift - it’s your charitable legacy!
Our Donors

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We gratefully acknowledge our 2021 donors of $100+, who collectively gave $3,557,012 to establish new funds and grow existing ones.

ABC
Anonymous, several
Lane Addision
Allen Aftker
American Imported Products
Steven Andrews & Scott Inseep
Dean & Joan Augenstein
Deo & Vicky Ault
Lawrence Babich
Ted & Bronwen Babich
Dr. David & Alice Bailey
Jerry & Barb Baker
Ray & Charlotte Baldauf
Dr. Michael & Rhonda Ballinger
Mark Boles
Boler Family Foundation
John & Carol Boblenz
Bloom Family Fund
Richard & Charloette Brown
Robert & Carol Brown
Susan Brown
Megan Brown
William Buckingham
Robert & Joyce Buckley
Dr. Timothy & Myrna Burga
Daniel & Marianne Burkhart
Judy Burton
Lisa Bush
Glen & Lori Campbell
Marlene Carney
Gary & Heidi Carr
Delandry Carter
Jef rey & Patricia Carwile
Mary Casey
Patricia Chapman
Jef rey & Amanda Clark
Mary Clinger
CommonWealth Care Funds
Dr. Raoul Concepcion
Dr. Roberto & Jacqueline Concepcion
Rob & Jane Cones
Kathy Conley
Cassandra Converse
Janet Converse
Conway Charitable Lead
Annuity Trust
Wes & Janet Cook
Rebecca Sue Craig
W. John & Janet Cramer
Nancy Crisler
Denise Criswell

DEF
Jason Dagelewicz
Kevin Davidson
Bobbi Davies
Lannette Davis
Wm. Kay Davis Foundation
Dr. Matthew Davis
Dayspring Wellsleyan Church
John Dean
Jody Demo-Hodgins
DeWine Family Foundation
Larry & Joyce DeYoung
Dr. David & Alice Bailey
Richard & Charles Brown
Norine Brown
Elizabeth Brown
Gary & Ralphine Gentzler
Dr. Henry Heinzmann
Ronald & Nina Heggart
Frederick & Judy Hazlet
Dr. Robert & Christine Haas
Rod & Cheryl Haberman
Habluetzel Family Trust
Tom & Nancy Hafer
Jef rey & Gina Hafner
Laur & Jani Harper
Harper House Company
Doug Harraman
Christopher & Kristin Hartman
Kevan & LuAnn Hartman
Rebecca Hartsok

GHI
Margie Gamble
Carol Garverick
Martha Gaston
GE Appliances
Larry & Mollie Geissler
Bradford & Jan Gentzler
Gary Gentzler
Gary & Rhaline Gentzler
Jonathan Gilchrist
Karen Goldsbery
Adam & Gina Goodman
Malcolm & Kathy Goodman
Daniel & Rebecca Gorenflo
Richard & Karen Gorenflo
Tiff any Gorman

BJ & Mary Granger
Judith Granger
Dennis Greashaver
Greater Palm Springs Convention
& Visitors Bureau
Ronald & Anna Green
Sharilene Green
Laura Grover
Ric & Susie Grubach
Phil & Sonia Haas
Dr. Robert & Christine Haas
Rod & Cheryl Haberman
Habluetzel Family Trust
Tom & Nancy Hafer
Jef rey & Gina Hafner
Laur & Jani Harper
Harper House Company
Doug Harraman
Christopher & Kristin Hartman
Kevan & LuAnn Hartman
Rebecca Hartsok

JKL
Austin Jacobs & Menucha Frischling
Dean & Sue Jacob
Beverly & James
Family & Friends of
Adam Johnstone
Tom & Ruth Johnston
Ann Jones
Richard & Mary Jones
Annie Joseph

In 2008, when Bob and Dottie Wopat left their $17 million estate to Marion Community Foundation, it changed a lot of things. If a career in the telecommunications industry taught Bob anything, it was that change would continue. So, he and Dottie created an endowment open to meeting the diverse needs of their beloved Marion.

In 2021, the Wopat Community Fund generated $484,000 in support of the Marion County Board of Developmental Disabilities, The Forge, Marion Family YMCA’s childcare expansion, a grant writing and program development training for local nonprofits, Marion County Historical Society, Marion County Federation of Women’s Clubs, and the Marion Palace Theatre, as well as charities like United Way, Junior Service Guild, and Salvation Army, among many others. In addition, the Wopat’s Scholarship Fund made $149,650 in awards and their designated fund for the Marion Family YMCA Fund provided $150,000.

The Only Constant in Life is Change.
Heraclitus 475 BC
Gifts like the following are part of the reason 2021 will be remembered for the third largest amount of contributions in the Foundation's 23-year history. We wish to thank and recognize these generous donors for supporting the Marion community:

**Betty S. Rogerson Estate - $1,120,368**
The largest gift of 2021 substantially increased Mike & Betty Rogerson’s Charitable Fund, as profiled in our cover story.

**Marion Board of Realtors - $305,925**
The Marion Board of Realtors Fund will award grants aimed at promoting safe, affordable, stable housing and neighborhood revitalization in Marion.

**Betty Jane Laucher Estate - $222,933**
Jane’s estate gift ensures that the Jane Laucher Emanuel Lutheran Church Fund will be a generous testament to her faith.

**John F. Dean in memory of Jane Ann Dean - $192,603**
John created the Jane Ann Canton Dean Fund to support programs for young people with disabilities, a cause dear to his late wife, Jane.

**Rebecca Sue Craig Estate - $139,385**
This estate gift created two funds, the Rebecca S. Craig Scholarship Fund for Ridgemont High School students and the Rebecca S. Craig Family Education Fund to support the Marion Palace Theatre’s School Matinee Program.

**Beth Kaufman in memory of Marty Kaufman - $110,000**
Beth continues to support and grow the Kaufman Family Memorial Scholarship Fund in memory of her late husband, Marty, and to support business students.

**Anonymous - $10,000**
Selflessly given without recognition, this gift created an unrestricted fund supporting charitable causes in Marion, Ohio.

Did you know you can create your legacy for as little as $100? Marion Community Foundation is steward to 52 charitable funds that are small and growing—known as Acorn and Legacy funds. With a small gift and a plan to add to the fund over time or fully endow the fund in your will, you, too, can leave a permanent legacy to support causes you care about in Marion, Ohio. Call us to learn more at 740-387-9704.
Thanks to our donors, in 2021, 209 students received $481,000 in awards | 101 high school seniors | 108 college students | 12 high schools | 40 colleges

Our ’21 Scholarship Funds
Alex Family
Altrusa Club of Marion I & II
A.B. & Hazel Augenstein
Irene Ballinger Memorial
Bergmann Family
Helen & Bob Bintz
Catherine Amelia Thew Brown Memorial
William & Martha Buckingham
Stephen J. Byrnes & Mary “Sally” Byrnes
Caledonia Alumni Association
Carey Family
Joe & Peggy Casey
Civitan Club of Marion
Dr. Wayne Collier
Community’s Memorial
Bill & Joan Cones
Clare Cooke Performing Arts
Alex Cooper Memorial
Cornell/Goodman
Craig
“Stormy Ray” Cushing
Marge Sorreles Davies Memorial
Dr. Kathy Dixon Memorial
Brenda Dye Music Boosters
Elgin Alumni Association
Elgin High School Wider Horizons
Helen E. Evans
Everett Family
Catherine Leila Ferguson Memorial
Donna M. Flach Memorial
Eric Benjamin Foos Memorial
Isabel Freer Memorial
Freshour Family
Carol S. Geissler Memorial
Kathy & Malcolm Goodman

John T. Gordon Memorial Eagle Scout
Gladdys & Everett Granger Memorial
Dr. James S. & Mary Gray Greetham Memorial
William & Marjorie Grover
Jerry Hamilton Memorial
Harper-Stuckey MTC Harris
Charles L. Hastings Memorial
Marguerite Marcelin Hastings Memorial
Allyson M. Haycox Memorial
Wayne Hoch Memorial
Roger & Donna Holbrook Memorial
Art & Anne Huggler Memorial
Erlin V. James Memorial
Judge Thomas K. Jenkins
Jerem Family Memorial
Adam Johnston Memorial
Tasha Jones Memorial
Donald B. Justice Memorial
Aris Kasotis Memorial
Kaufman Family Memorial
Kory Kirkpatrick Memorial
Louise Kling Memorial
John F. Kreis Memorial
Mandy Kruder Memorial
Dr. Sarah Kulkofsky Memorial
LaRue Alumni Association
Stephanie K. Lust Memorial
Marion Academy of Medicine
Marion Area Auxiliary
Marion Elks Lodge No. 32
Marion Noon Kiwanis Club I & II
Marion Rotary Club
Marion Rotary Club Scholarships
Marion Women’s Business Council
Kenny Martin Memorial
Alex Masters Memorial
Vera O. McDanel
Ted & Elaine Mitchell Memorial
Rocco Nicolosi Memorial
Cheryl Oehler Memorial

Charles E. Orcena
John D. & Kathleen E. O’Shea
Janet Palm Memorial
Joe Petrich & Al Beach Memorial
Paul Pezley Baseball
Jacob Pfeiffer & Kevin Pfeiffer Memorial
Pleasant Academic Boosters
Pleasant Local Schools Board of Education
Beatrice Prior Memorial
Christopher B. Ream
Dr. Herman & Mrs. Jean Reas
Gregory A. Rees Memorial
Eugene & Cecilia Reszczynski
Eula M. Rhoads
Ridgetown
David K. Rogers Memorial
Max Ross Memorial
Laurie Rush & Thomas Rosol Nursing Student
John T. & Lois Schmidt
Eddie Shelton Agricultural
Gary & Diana Sims Family
Danny C. Sipes Memorial
Logan Stevens Memorial
Stewie Family
Daniel B. Stover Memorial
Clifford & Frances Strine Family
Taft Middle School Music Department
Helen M. Thew Memorial
Three Sisters Nursing
Herbert & Jane Tillett
Gary W. Troll Memorial
Jeannette Turner Memorial
United Church Homes
Voll Family Bowling Green State University
Douglas & Elaine Waring Memorial
John & Jackie Watkins
Whirlpool Corp/OneEnergy STEM
Jeannette White Memorial
Andrew Wigon Memorial
David G. Wilhelm Memorial
Donald & Beulah Mae Williams
Dr. Shelton & Becky Williams
Mary Ellen Withrow
Norman & Mary Ellen Wthrow
J. Richard & Peggy Word
Buck & Nikki Workman
Susan W right
Angela Yazel
Beverly Young
Fred & Suzie Zeigler
Brant & Lynn Zucker
Josh Zucker
Michael & Tracie Zucker

Donors listed here contributed $100 or more during calendar year 2021.

STUV
Suresh Sangani
J ohn & Pat Scharer
Ronald & Laura Scharer
W esley & Karen Schertzer
Memorial Scholarship Fund
Tom & Cindy Schifer
Lois Schmidt
Thomas Schrote
Peter Schuler
Dr. Richard Schuler
JOan Shelton
Bill & Linda Shepard
Lyn A. Shirk
Elizabeth Ann Shumaker Estate
J ay Shumaker
Megan Simmermon
Gary & Diana Sims

Howard Smith
Kevin & Ruth Smith
Carol Sparre
Kermit & B. Hazel Spracklen
Richard & Donna Spracklen
Gary Stansbery
David Starbuck
Joe Staub
Paul & J ulia Staub
Richmond & Susan Sterling
Laurie Stevens
Jim & Lori Stevenson
J ohn & J oan Stewart
Donald & Pamela Stone
Betty Stover
Douglas & Kara Strine
James Strine
Max & Janet Strine
Michael Stuckey
Timothy & Krista Sullivan
Margaret Sumner
Karen Terry
Rose Tilley
J ason & J ennifer Todd
Kenneth & Linda Todd
Ted & Rebecca Travis
Henry A. True Trust
Lu Ann Tully
United Way of Central Ohio
Louise Vance
Stanley Vance
Verne Hart Insurance
M argaret Vogel

WXYZ
Walter Charitable Fund at Greater Alliance Foundation
Terry & Dana Walter
J ohn & Dr. Ann Walters
J ef rey & Marsha Ward
Warren Brown Family Foundation
W assebeck Speed Shop
Alan & Lisa Watson
Robert Wear
Mary W hilton
W hirlpool Corp.
Nancy W hitaker

John & Jacki W idder
Gary & Ina W ilhelm
W illiams Family Trust
B ecky W illiams
Keith W illiams
Vaughn & Linda W illiams
J ohnathan & Maureen
W illismon
G lynn & Marcia W ison
Randy & Sandra W inland
Norman & Mary Elizabeth W throw
J . Richard & Peggy W ord
Buck & Nikki W orkman
Susan W right
Angela Yazel
Beverly Young
Fred & Suzie Zeigler
Brant & Lynn Zucker
Josh Zucker
Michael & Tracie Zucker

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## Financial Position

<table>
<thead>
<tr>
<th>CURRENT ASSETS:</th>
<th>2021</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash and cash equivalents</td>
<td>$1,513,338</td>
<td>$1,599,328</td>
</tr>
<tr>
<td>Investments, at fair value</td>
<td>62,652,517</td>
<td>49,606,241</td>
</tr>
<tr>
<td>Prepaid expenses</td>
<td>23,139</td>
<td>22,107</td>
</tr>
<tr>
<td>Total current assets</td>
<td>64,188,994</td>
<td>51,227,676</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PROPERTY AND EQUIPMENT:</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Equipment</td>
<td>29,883</td>
<td>28,409</td>
</tr>
<tr>
<td>Less accumulated depreciation</td>
<td>(21,526)</td>
<td>(18,571)</td>
</tr>
<tr>
<td>Total equipment</td>
<td>8,357</td>
<td>9,838</td>
</tr>
</tbody>
</table>

| Total assets | **$64,197,351** | **$51,237,514** |

## Activities & Changes in Net Assets

### REVENUES & OTHER SUPPORT: |

<table>
<thead>
<tr>
<th>2021</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contributions</td>
<td>$2,785,075</td>
</tr>
<tr>
<td>Net unrealized gain on investments</td>
<td>4,756,603</td>
</tr>
<tr>
<td>Net realized gain on investments</td>
<td>6,272,594</td>
</tr>
<tr>
<td>Dividends and interest</td>
<td>846,791</td>
</tr>
<tr>
<td>Fundraising event - Gala</td>
<td>0</td>
</tr>
<tr>
<td>Other income</td>
<td>839</td>
</tr>
<tr>
<td>Total revenues &amp; other support</td>
<td>14,661,902</td>
</tr>
</tbody>
</table>

### EXPENSES: |

<table>
<thead>
<tr>
<th>2021</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fundraising</td>
<td>38,473</td>
</tr>
<tr>
<td>Program Services</td>
<td>2,114,478</td>
</tr>
<tr>
<td>Management &amp; General</td>
<td>543,075</td>
</tr>
<tr>
<td>Total expenses</td>
<td>2,696,026</td>
</tr>
</tbody>
</table>

### Change in net assets |

<table>
<thead>
<tr>
<th>2021</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>11,965,876</td>
<td>(60,184)</td>
</tr>
</tbody>
</table>

| Total net assets beginning of year | 45,932,229 | 45,992,229 |

## Statements of Cash Flows

### CASH FLOWS FROM OPERATING ACTIVITIES: |

<table>
<thead>
<tr>
<th>2021</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change in net assets</td>
<td>$11,965,876</td>
</tr>
</tbody>
</table>

#### Adjustments to reconcile the change in total net assets to net cash used by operating activities: |

<table>
<thead>
<tr>
<th>2021</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Depreciation</td>
<td>2,949</td>
</tr>
<tr>
<td>Net realized and unrealized gain on investments</td>
<td>11,029,197</td>
</tr>
<tr>
<td>(Increase) decrease in prepaid expenses</td>
<td>(1,032)</td>
</tr>
<tr>
<td>(Decrease) increase in accounts payable and accrued expenses</td>
<td>(3,182)</td>
</tr>
<tr>
<td>(Decrease) increase in grants and scholarships payable</td>
<td>(399,026)</td>
</tr>
<tr>
<td>Increase (decrease) in agent liabilities</td>
<td>1,396,169</td>
</tr>
</tbody>
</table>

Net cash provided (used) by operating activities | 23,990,951 | (224,861) |

### CASH FLOWS FROM INVESTING ACTIVITIES: |

<table>
<thead>
<tr>
<th>2021</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Net (contributions to) proceeds from investments</td>
<td>(24,075,467)</td>
</tr>
<tr>
<td>Purchases of equipment</td>
<td>(1,474)</td>
</tr>
<tr>
<td>Net cash (used) provided by investing activities</td>
<td>(24,076,941)</td>
</tr>
</tbody>
</table>

Net change in cash and cash equivalents | 85,990 | 1,515,394 |

Cash and cash equivalents at the beginning of year | 1,599,328 | 3,114,772 |

Cash and cash equivalents at the end of year | $1,513,338 | $1,599,328 |

### SUPPLEMENTAL DISCLOSURE OF CASH FLOW INFORMATION: |

Cash paid for: Interest & Income taxes | $0 | $0 |

The figures here are for the fiscal years ending June 30, 2021, and 2020, respectively. They are excerpted from the annual audit of Marion Community Foundation prepared by Holbrook & Manter, CPAs. The full report, including Marion Community Foundation’s complete list of funds and grants, is available upon request and may be viewed online at www.MarionCommunityFoundation.org.
In this issue...
- 2021 Financials
- Record Year for Contributions
- Annual Grants Summary
- TEACH & Equity Awards

Proud to be MarionMade!

Our New Home on the World Wide Web

Visitors to our website will discover a bold new user experience at www.MarionCommunityFoundation.org thanks to the talents of local web development firm, Neighborhood Image. Launched in mid-December 2021, the site features information on our grants and scholarship programs, a multitude of giving options (including a secure, online giving portal), resources for professional advisors to guide their clients’ philanthropy, and information on the history, staff, and activities of Marion Community Foundation. Donors can log in for details on their charitable funds, make contributions, and see the good their fund is doing in the community. Visit us online soon!

The Flock Has Landed

Marion went to the birds in 2021—cardinals to be exact. Marion Community Foundation was the lead of 17 sponsors to support this community art project. The culmination of a design competition for local artists, The Cardinal Project was spearheaded by Downtown Marion, Inc. and features 17 colorful sculptures, a nod to Ohio being the 17th State of the Union. Each is a unique artistic creation, many featuring aspects of the Marion community and its history. They can be found at locations throughout downtown.