



MARION COMMUNITY FOUNDATION

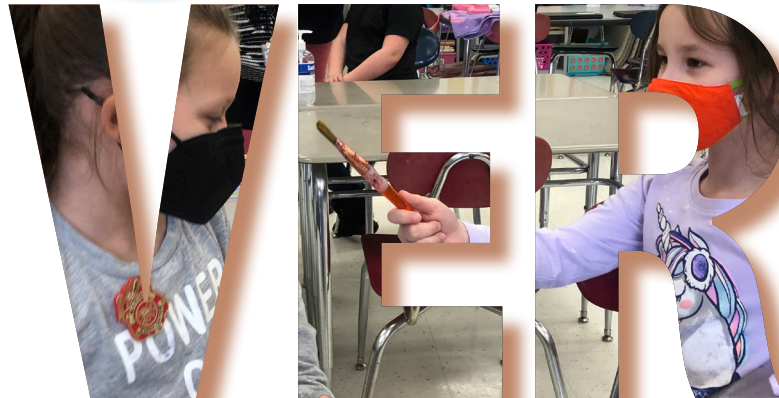
In 2021, as the pandemic ebbed and surged, generosity was one thing that remained, not only constant, but increased. Marion Community Foundation experienced the **third largest year of contributions in the Foundation's 23 year history**, receiving 898 gifts totalling in excess of **\$3.5 million** and 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

Continued on page 3



per-se-ver-ance /parsə'veirəns/ noun

persistence in doing something despite difficulty or delay in achieving success.

For You. For Marion. Forever.



Excellence Accountability Impact™

OUR MISSION

To continually improve the Marion community through philanthropy, leadership & civic engagement

OUR VISION

A generous, educated, healthy, collaborative & vibrant community



Our annual holiday party returned this year — in drive-thru form! We kicked off the season by welcoming 100+ carloads of friends on a lovely December evening to share food, gifts, and ample holiday cheer!

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.**



Dean L. Jacob
President & CEO

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

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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 Thiel 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.



Betty & Mike Rogerson

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, Shriner’s 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 | Jeff Lamb



Marion CAN DO! Fund

Supporting economic development in Marion, Ohio | Daniel Burkhardt

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 **L**
Supporting Pleasant High School athletics, 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

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** **A** Fund | Children of Jack & Marilyn
- **Loudenslager & Zucker Family Fund** | Roy Loudenslager

Field of Interest

Cooper-Donaldson Parks & Environment Fund **L**
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 **A**
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 **N**
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 **L**
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 **N**
Supporting Marion County students pursuing careers in music and music education | Marion Music Club

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

- L** **Legacy** fund-to be fully funded through planned giving
- A** **Acorn** fund-created with a plan to be fully funded at a future date
- N** **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.



'21 Grants

Donor Advised \$154,000+

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.

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
Wm. Kay Davis Fund
Randy & Rosalie Sauro Drazba Fund *in Memory of Carmella Sauro*
Noel & Maria Eboh Family Fund
Ellirae 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 Jacob Fund
Dean & Sue Jacob Family Fund
George & Norma 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
McClellan 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
Shepard-Melhuish Fund
Dalton Sipes Peace Fund
Stuckey Family Fund
Henry A True Trust Fund
Roger & Janice Vanover Family Fund
We Remember Al Fund
Whetstone 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 | Flying Horse Farms | Green Energy Ohio | Imagination Library | Junior Service Guild's Christmas Clearinghouse | Knowledge Academy | Leap of Faith Dance Company | Luke 3:11 Ministries' PBJ Truck | 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 Women'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 | OhioHealth 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 |



Rotary Centennial Playground

Several 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 McClellan Family Fund, Whetstone Financial Fund, & Beverly S. Young Fund as well as \$114,000 in Community Grants.

Turning Point | United Way | Veterans Memorial Park | Village of Convoy Historical Society | Voice of Hope Pregnancy & Family Center | Wesleyan Church | Worthington Christian Church | Youth Engaged in Philanthropy

Support What You Love with a Donor Advised Fund

Staff: Familiar Faces, New Titles

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 Assistant Kathy Conley, who has proved indispensable in her talents with databases, systems, and reports, and Lori S.



Stevenson



Conley

bookkeeper for 23 years. John Colla, Larry Carone, and Joe Adams of Clearstead Advisors provide investment services.

Stevenson, promoted to Community Relations 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

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, \$1,896, *Marion County Historical Society*

Kenny Martin Charitable Fund, \$1,358, *Palace Cultural Arts Association*; \$1,358 *Marion Union Station Assoc.*

Meredythe & John McDaniel Fund, \$1,000, *Palace Cultural Arts Assoc.*

David K. Miller Fund, \$194, *Marion County Historical Society*

Palace Perpetual Care Fund, \$33,245, *Marion Palace Theatre roof project*; \$108,000, *sound system replacement*

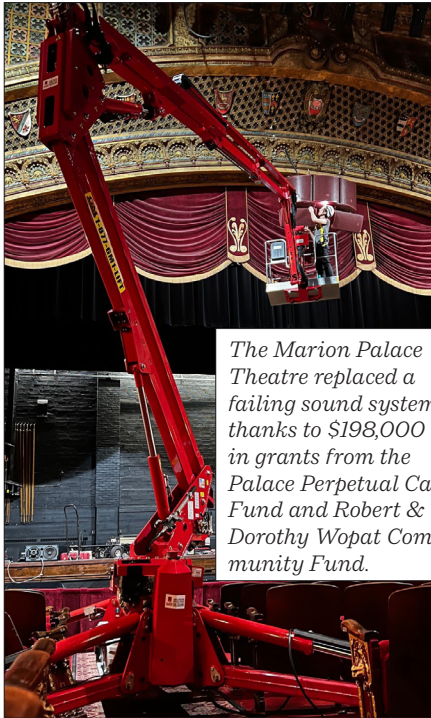
Poorman Palace Theatre Fund, \$460, *Palace Cultural Arts Association*

Charles Ransome Student Music Fund, \$875, *Elgin Music Boosters Association*

Mike & Betty Rogerson's Charitable Fund, \$2,737, *Marion Palace Theatre*

Joe Slanser Marion Union Station Fund, \$46,898, *Marion Union Station Association*

SSG Shannon M. Smith "No Fear" Fund, \$3,154, *Ohio Fallen Heroes Memorial*



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 & Jo Ann R. Zimmerman YMCA Fund, \$2,078, *Marion Family YMCA*

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*

JoAnn Radwin-Zimmerman Bridge Out of Poverty Fund, \$1,034, *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*

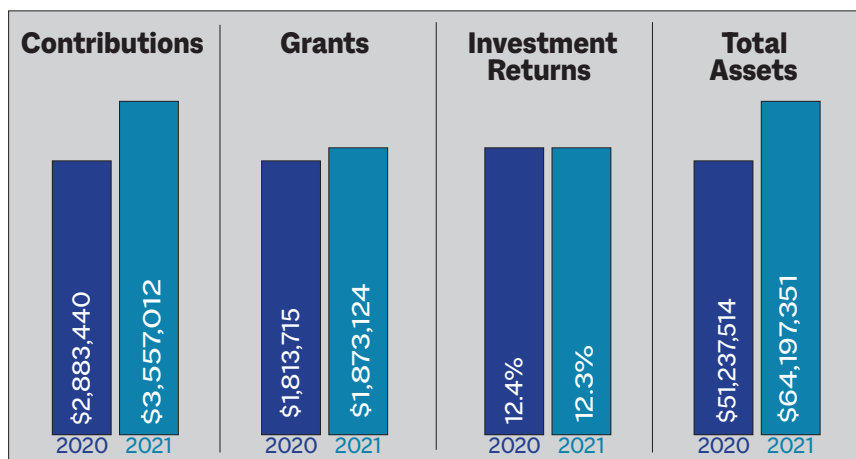
Prexy Play Scholarship Fund, \$535, *Marion Harding High School*

Arthur J. & Jo Ann Radwin Journalism Fund, \$1,044, *journalism education*

Jean Zoeller Reas Endowment Fund, \$2,678, *St. Ursula Academy*; \$2,677, *Calvert High School*

Mike & Betty Rogerson's Charitable Fund, \$2,737, *Thiel Collge*

Judge William Wiedemann Family Fund, \$999, *Marion Technical College*; \$999, *Ohio State Marion*



Faith-Based

Epworth United Methodist Church Endowment Fund, \$2,079, *Epworth United Methodist Church*
Gene & Jan Farison Family Fund, \$259, *Epworth United Methodist Church*
A. Merle Hamilton Fund, \$15,974, *Central Christian Church*; \$15,973, *Epworth UMC*; \$16,073, *Centenary United Methodist Church*
Jane Laucher's Emanuel Lutheran Church Fund, \$29,266, *Emanuel Lutheran Church*
Lust Family Fund, \$817, *Emanuel Lutheran Church*
Meredythe & John McDaniel Fund, \$2,838, *Epworth UMC*
Parrott Family Emanuel Lutheran Church Fund, \$224, *Emanuel Lutheran Church*
Jean Zoeller Reas Endowment Fund, \$2,677, *St. Mary Parish, Tiffin, OH*
Joe Slanser 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, \$1,034, *First Presbyterian Church of Marion*

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 & Jan Farison Family Fund, \$259, *United Way of Marion County*
Jack V. & Violet M. Griffith Family Fund, \$931, *Marion Shelter Program*
Norma Jacob 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*
Judge William Wiedemann Family Fund, \$1,333, *United Way of Marion County*

Health & Wellness

Betty L. Davis Fund, \$208, *Marion Area Counseling Center*
Fout-Price Memorial Fund, \$1,896, *Marion General Hospital Hospice*
Gladys Simpson and Melvin Ulery Memorial Fund, \$13,981, *Center Street Community Health Center*
Sutherin Family Eye Care Fund, \$5,479, *Center Street Community Health Center ophthalmic services*
Wopat Family YMCA Fund, \$150,000, *Marion Family YMCA*

Parks & Environment

Don & Deb Alspach Fund, \$581, *Prairie Parks Foundation*
Dr. & Mrs. Glen Burton Jr Memorial Fund, \$464, *Prairie Parks Foundation*
Jerry Davis Prairie Parks Foundation Fund, \$1,315, *Prairie Parks Foundation*
Terradise Nature Preserve Fund, \$1,867, *Prairie Parks Foundation*

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

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for supporting the publication of this 2021 Annual Report.



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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-torium 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 offers 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**.

OUR PURPOSE
IS TO MAKE
PHILANTHROPY
EASY, ACCESSIBLE
& AFFORDABLE
TO EVERYONE
in our community



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+

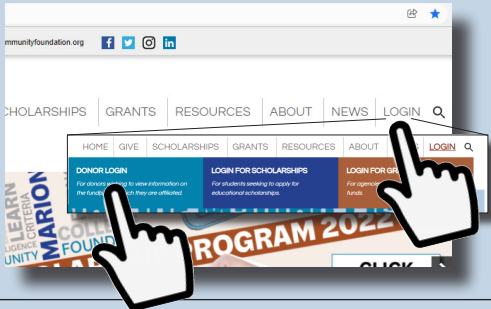
Field of Interest Funds are created by donors who have a particular cause that is near to their heart and want to support a variety of organizations who do good work in that area. In 2021, these grants included:

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

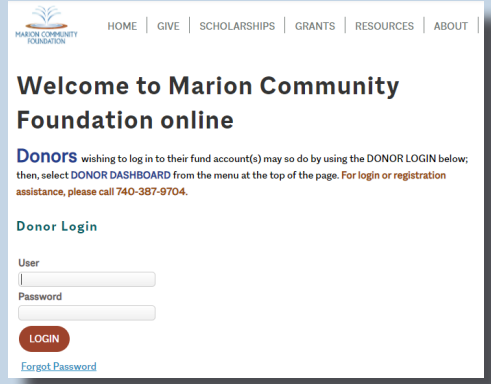
Marion Speech and Hearing Fund, \$11,967, MCBDD speech, language, and hearing services
Vera O. McDanel Senior Citizens Transportation Fund, \$530, Marion Senior Center
Kathleen E. O'Shea Fund, \$7,315, musical productions at Marion Palace Theatre and all Marion high & middle schools
Prospect SUNSWIM Pool Fund, \$10,180, Village of Prospect
Smith-Brown Family Fund, \$1,403, Marion Family YMCA Parkinson's disease programs
Janis & Greg Swepston Family Fund, \$457, Marion Public Library
Francis & Thelma Wise Fund, \$2,100, Marion Family YMCA Parkinson's disease programs; \$2,100, Marion Family YMCA arthritis programs; \$2,100, Prevent Blindness Ohio Affiliate

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:

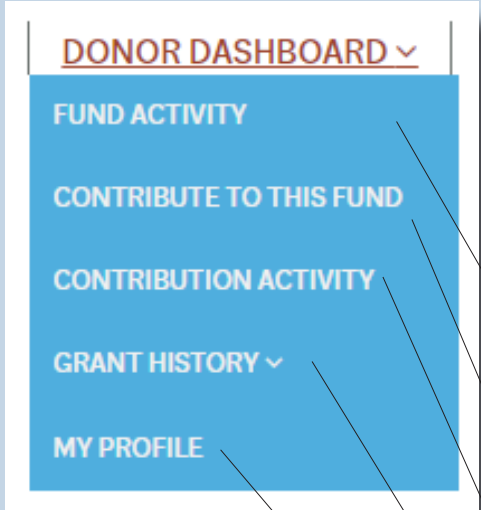


- Visit our website:
www.MarionCommunityFoundation.org
- Hover over the LOGIN button
- Slide to the option that says DONOR LOGIN & click



- 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
- contributions
- grant history
- 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**.

TEACH Grants

\$12,000+

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 offered to two counties. Visit our website and click on the 'News' tab to learn more.

Tri-Rivers Career Center, \$1,050, 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, \$2,180, 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.



Supported by the Pillar Credit Union Teachers Fund, River Valley Teachers Fund, and Ray & Charlotte Baldauf Fund

Agency \$164,000+

The following Agency Funds, created by the leadership of Marion area nonprofits and charities to support their own programs and operations, are active at Marion Community Foundation:

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
Joel Draper Fund
Education Equity Fund
Gary Ellis Business Builders Fund

Alejandro Garcia Blessings Fund
Carolyn Files Fund
Douglas & Virginia Geib Fund
HPM Fund
James & Zymilla Hamilton Fund
Peter & Barbara Miller Fund
Kable Fulfillment Corporation Fund
Geraldine McFadden Kuhn Fund
Wayne Kuhn Fund
Mary Alice Lyon Fund
MTC Founders Fund
Marion Rotary Club Fund
John E. Martin Fund
Ohio MedCenter Fund
J.C. Penney Fund
Joseph Sansotta Fund
Smith Clinic Fund
Frederick G. Smith, MD, Memorial Fund
Philip W. Smith Fund
Philip W. Smith, MD, Memorial Fund
GTE North/Verizon Fund
Wyandot, Inc. Fund
MTC Foundation Fund
Marion YMCA Endowment Fund
Mary C. Lombardo's St. Vincent de Paul Society Fund
Ohio State University at Marion Endowment Fund
Ruth Reynolds' Eye-to-Eye Fund
Trella Romine Stewardship Fund
Stengel-True Museum Endowment Fund
Turning Point Organizational Endowment Fund
United Way Endowment Fund
Women's Club Home Endowment Fund

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 '21 Donors

We work diligently to ensure that names are listed correctly. If we need to update our database, please call us, 740-387-9704.

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

A B C

Anonymous, several
Lane Addison
Allen Altfater
American Imported Products
Steven Andrews & Scott Inskeep
Dean & Joan Augenstein
Deo & Vicky Ault
Lawrence Babich
Ted & Bronwen Babich
Dr. David & Alice Bailey
Jerry & Barb Baker
Ray & Charlotte Baldauf
Charitable Trust
Dr. Michael & Rhonda Ballinger
Brian Barger
John & Jana Bartram
Dr. James & Ellen Bazzoli
Bradley & Carol Bebout
Edward & Vicki Bell
Donald & Karen Bender
Peter & Mary Best
Bloom Family Fund
John & Carol Boblenz
Boler Family Foundation
Mark Boles
Richard & Sandy Borland
Barrie & Julie Bothwell
Matthew & Amy Bratton
Ralph & Jane Brown
Richard & Charlotte Brown
Robert & Carol Brown
Susan Brown
Megan Brown
William Buckingham
Robert & Joyce Buckley
Dr. Timothy & Myrna Burga
Daniel & Marianne Burkhardt
Judy Burton
Lisa Bush
Glen & Lori Campbell
Marlene Carney
Gary & Heidi Carr
Delandry Carter
Jeffrey & Patricia Carwile
Mary Casey
Patricia Chapman
Jeffrey & Amanda Clark
Mary Clinger
CommonWealth Cares Fund
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

John & Helen Crouse
Dr. Paul & Kelly Culler

D E F

Jason Dagelewicz
Kevin Davidson
Bobb Davies
Lannette Davis
Wm. Kay Davis Foundation
Dr. Matthew Davis
Dayspring Wesleyan Church
John Dean
Jody Demo-Hodgins
DeWine Family Foundation
Larry & Joyce DeYoung
Diann Cage Design Company
Steven Dickerson
Norman & Mary Ann Dickman
Paula Dodsworth
Sean & Heidi Dodsworth
Karen Donaldson
Mary Donaldson &
Richard Cooper
Everett & Frances Douce
Bishop Gregory Draper
Daniel & Karen Duncan
Jeremy Dunn
Donald & Dawn Easley
Dr. Noel & Maria Eboh
Elgin Alumni Association
Brad & Lea Evans
Daniel Evans
Everett Farm, LLC
Donald & Barbara Everly
Gene & Jan Farison
Lester & Sharel Firstenberger
Tammy & Sue Flaherty
Family & Friends of James A.
Flickinger
Kit & Lori Fogle
Frederick Foos
Rev. Douglas & Beverly Ford
Fox Surveying Company
Hon. Robert & Peggy Fragale
Eric & Mary Freshour
John & Pam Freshour
Rob & Ann Fulkerson
Loren & Lois Fulton

G H I

Margie Gamble
Carol Garverick
Martha Gaston
GE Appliances
Larry & Mollie Geissler
Bradford & Jan Gentzler
Gary Gentzler
Gary & Ralphine Gentzler
Jonathan Gilchrist
Karen Goldsberry
Adam & Gina Goodman
Malcolm & Kathy Goodman
Daniel & Rebecca Gorenflo
Richard & Karen Gorenflo
Tiffany Gorman

BJ & Mary Granger
Judith Granger
Dennis Greashaber
Greater Palm Springs Convention
& Visitors Bureau
Ronald & Anna Green
Sharlene Green
Laura Grover
Ric & Susie Grubaugh
Phil & Sonia Haas
Dr. Robert & Christine Haas
Rod & Cheryl Haberman
Habluetzel Family Trust
Tom & Nancy Hafer
Jeffrey & Gina Hafner
Larry & Linda Hall
Benjamin & Jane Harper
Harpster House Company
Doug Harraman
Christopher & Kristin Hartman
Kevan & LuAnn Hartman
Rebecca Hartsook

Lisa Hoppe
John A. Hritz Family Trust
Louis & Betty Hughes
James & Louise Hurtle
Charles & Cathy Hutzler Jr.
Gary & Denise Iams
Karen Innis
Adam & Brittany Issler

J K L

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

**The Only
Constant
in Life is
Change.**

-Heraclitus 475 BC

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.

Fran Harville
Frederick & Judy Hazen
Ronald & Nina Heggart
Dr. Henry Heinzmann
Richard & Ann Marie Henderson
Richard & Debra Herringshaw
Jennifer Hill
Historic Marion Cemetery
Association
Kevin & Irene Hoch
Linda Hoch
Ronald Hoch
Chryil Hodges
Janet Hollandsworth
Harry & Annette Holler

Junior Service Guild of Marion
Linda Justice
J. Watkins
Hon. Marcy Kaptur
Rose Karon
Stuart & Cynthia Karon
Stephen & Kerri Karrick
George & Joan Kasotis
Beth Kaufman
John Keggan
Steve Kehn
Carol Kelly
Robert & Theresa Kern
Randolph & Kelley Ketcham
Victor Ketcham

Khaled Khatteche
Carolyn Kile
Mary M. Kile & Alan D.
Rutenberg
Victoria Kimmel
Susan Klingbeil
Lori Klingel-Ingram
Ottis Koehler
Larry & Clarissa Kramer
Jo Kreis-Isaacs
George & Janet Kruder
Demos & Frances Kyrasiz
Ronald & Effie Laipply
Jeffrey Lamb
Judith LaMusga
Danielle Landon
LaRue Alumni Association
Merle Lashey
Miriam Lashey
Carol Lathrop
Betty Jane Laucher Estate
Mark & Kelly Lawrence
Douglas & Jodee Lawrence
James & Julie Lewis
Mitch & Cynthia Libster
Michael Liska
Frank Lo
Rachel Long
Ralph & Robin Lorenzo
Doug Loudenslager
Reva Loudenslager
Roy Loudenslager
Philip Loyer
Don & Laurie Ludwig
Robert & Marilyn Ludwig
Timothy & Rita Lyons

MNO

Marion Board of Realtors
Marion CanDo!
Marion County Farm Bureau
Marion Music Club
Marion Noon Kiwanis
Foundation
Marion Palace Theatre
Endowment Fund
Marion Rotary Foundation
Marion Technical College
Foundation
Marion Women's Business
Council
Andrew Markley
Jami Mathias
Ann McAllister
Margaret McArdle
Robert & Marilyn McBeth
Russell & Marilyn McBride
John McDaniel
Michael & Stephanie McDaniel
William & Betty McElroy

Cindy McEntire
Daniel & Sue McGrady
Mennel Milling
Company
Mens Tap Line &
Christmas at the
Palace Cast
Larry & Elaine
Merchant
Susan Merlack
Merle & Peg Hamilton
Charitable Foundation
Valerie Mettler
Rhodella & Joyce Metz
Jay & Linda Middleton
Mid-Ohio Energy
Cooperative
Courtney Miller
Barbara Miller DeHaven
Thomas & Myra
Milligan
Michael & Linda Mills
Janet Mirabella
Erin Mitchell
Brig. Gen. Harley
Mooney
Kent & Diana Morgan
Morrall Excavating
Daniel Morrison
Mark & Patricia
Murphy
Myers Giving Fund
Judith Myers
Bryan & Sylvia Neff
Thomas & Sondra
Nicodemus
Michael & Judith
Nicolosi
Rick & Paula Nicolosi
Emma O'Daniel
Bill & Jennifer
O'Donnell
Pauline Oehler
Ohio Farm Bureau
Federation
Lorraine Olsheski
OneEnergy Enterprises

PQR

Tom & Martha Paciocco
Michael Palm
Kyle & Ruby Parish
Mark W. Parker
Susan A. Parker
Rex & Carolyn Parrott
Gary & Nancy Patterson
Judy Penix
Doris Penry
Nancy Perketto
Daniel & Andrea Pezley

\$3.5 Million in Gifts

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 - \$100,000

Selflessly given without recognition, this gift created an unrestricted fund supporting charitable causes in Marion, Ohio.

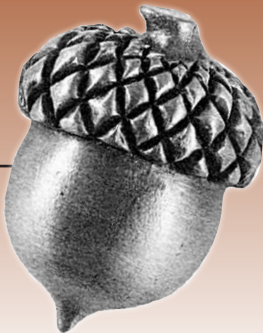
Wendell Pfeiffer
Pillar Credit Union
Kellye Pinkleton
Cheryl Plaster
Pleasant Academic Boosters
Pleasant Music Boosters
POET Biorefining
Rick & Nancie Poorman
Cy & Julie Prettyman
Matt Primmer
Eric & Megan Queen
Mike & Ann Raley
Ralph Brothers Farm

Dennis & Linda Ratlif
David & Karen Ream
Joanne Rebbeck
Donna Reece
Richard & Ellen Rees
Renaissance Charitable
Foundation
Brad & Kathy Ridge
Gary Risch
Rob's Hauling Services
Aaron Robbins
Keith & Sheila Roberts
Derek & Amber Robinson

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**.

| | |
|---------------|-----|
| Acorn Funds | 21 |
| Legacy Funds | 31 |
| Fully Endowed | 322 |
| Non-Endowed | 57 |

TOTAL 435



Lydia Roebuck
Hon. Richard & Sophie Rogers
Betty S. Rogerson Estate
Roy I. Kaufman, Inc.

STUV

Suresh Sangani
John & Pat Scharer
Ronald & Laura Scharer
Wesley & 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
Jay Shumaker
Megan Simmermon
Gary & Diana Sims

Howard Smith
Kevin & Ruth Smith
Carol Spare
Kermit & B. Hazel Spaulding
Richard & Donna Spracklen
Gary Stansbery
David Starner
Joe Staub
Paul & Julia Staub
Richard & Susan Sterling
Laurie Stevens
Jim & Lori Stevenson
John & Joan Steward
Donald & Pamela Stone
Betty Stover
Douglas & Kara Strine
James Strine
Max & Janet Strine
Michael Stuckey
Timothy & Krista Sullivan
Margaret Sumner
Karen Terry
Rose Tilley
Jason & Jennifer Todd
Kenneth & Linda Todd

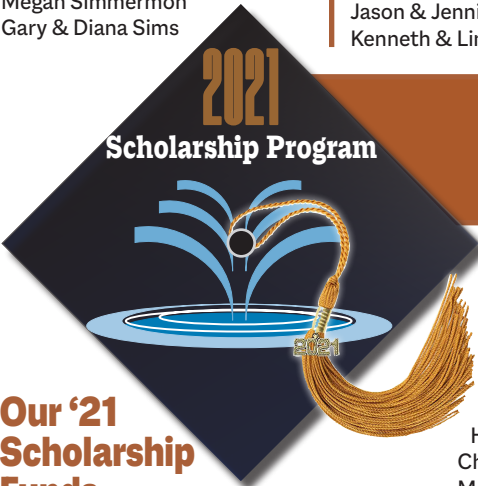
Ted & Rebecca Travis
Henry A. True Trust
Lu Ann Tully
United Way of Central Ohio
Louise Vance
Stanley Vance
Verne Hart Insurance
Margaret Vogel

WXYZ

Walter Charitable Fund at
Greater Alliance Foundation
Terry & Dana Walter
John & Dr. Ann Walters
Jeffrey & Marsha Ward
Warren Brown Family
Foundation
Wasserbeck Speed Shop
Alan & Lisa Watson
Robert Wearn
Mary Whelton
Whirlpool Corp.
Nancy Whitaker

Judy Widder
Jane Wiecher
Gary & Ina Wilhelm
Williams Family Trust
Becky Williams
Keith Williams
Vaughn & Linda Williams
Jonathan & Maureen
Williamson
Glynn & Marcia Wilson
Randy & Sandra Winland
Norman & Mary Ellen Withrow
J. Richard & Peggy Word
Buck & Nikki Workman
Susan Wright
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.



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

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

John T. Gordon Memorial Eagle Scout
Gladys & 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
Erin Y. James Memorial
Judge Thomas K. Jenkins
Jerew 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
*honoring George Brown, Warren Brown,
Robert C. Dowd, Catherine Ferguson,
Warren G. Harding, Robert E. Kibbey,
R.T. Lewis, and Karl W. Schell*
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 Reszczyński
Eula M. Rhoads
Ridgemont
David K. Rogers Memorial
Max Ross Memorial
Laura 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 Wigton Memorial
David G. Wilhelm Memorial
Donald & Beulah Mae Williams
Dr. Shelton & Becky Williams
Mary Ellen Withrow
Norman Withrow Golf
Robert M. & Dorothy C. Wopat
Youth Engaged in Philanthropy

CONDENSED FINANCIAL STATEMENTS

Fiscal Year
July 1, 2020-June 30, 2021

Financial Position

| CURRENT ASSETS:- | 2021 | 2020 |
|---------------------------------|---------------------|-------------------|
| Cash and cash equivalents | \$ 1,513,338 | \$ 1,599,328 |
| Investments, at fair value | 62,652,517 | 49,606,241 |
| Prepaid expenses | 23,139 | 22,107 |
| Total current assets | 64,188,994 | 51,227,676 |
| PROPERTY AND EQUIPMENT:- | | |
| Equipment | 29,883 | 28,409 |
| Less accumulated depreciation | (21,526) | (18,571) |
| Total equipment | 8,357 | 9,838 |
| Total assets | \$64,197,351 | 51,237,514 |

LIABILITIES & NET ASSETS

| CURRENT LIABILITIES:- | 2021 | 2020 |
|---------------------------------|-------------|-------------|
| Accts pybl & accrued expenses | \$ 12,768 | \$ 15,950 |
| Grants and scholarships payable | 603,303 | 1,002,329 |
| Total current liabilities | 616,071 | 1,018,279 |

LONG-TERM LIABILITIES:-

| | | |
|-------------------|-----------|-----------|
| Agent liabilities | 5,683,175 | 4,287,006 |
|-------------------|-----------|-----------|

| | | |
|--------------------------|------------------|------------------|
| Total liabilities | 6,229,246 | 5,305,285 |
|--------------------------|------------------|------------------|

NET ASSETS:-

| | | |
|--------------|------------|------------|
| Unrestricted | 57,898,105 | 45,932,229 |
|--------------|------------|------------|

| | | |
|---|----------------------|----------------------|
| Total liabilities & net assets | \$ 64,197,351 | \$ 51,237,514 |
|---|----------------------|----------------------|

Activities & Changes in Net Assets

| REVENUES & OTHER SUPPORT:- | 2021 | 2020 |
|---------------------------------------|--------------|--------------|
| Contributions | \$ 2,785,075 | \$ 1,058,881 |
| Net unrealized gain on investments | 4,756,603 | (350,229) |
| Net realized gain on investments | 6,272,594 | 884,477 |
| Dividends and interest | 846,791 | 1,031,668 |
| Fundraising event - Gala | 0 | 2,500 |
| Other income | 839 | 445 |
| Total revenues & other support | 14,661,902 | 2,627,742 |

EXPENSES:-

| | | |
|----------------------|-----------|-----------|
| Fundraising | 38,473 | 56,168 |
| Program Services | 2,114,478 | 2,138,292 |
| Management & General | 543,075 | 493,466 |
| Total expenses | 2,696,026 | 2,687,926 |

| | | |
|----------------------|------------|-----------|
| Change in net assets | 11,965,876 | (60,184) |
|----------------------|------------|-----------|

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

| | | |
|-------------------------------------|---------------------|-------------------|
| Total net assets end of year | \$57,898,105 | 45,932,229 |
|-------------------------------------|---------------------|-------------------|

Statements of Cash Flows

CASH FLOWS FROM OPERATING ACTIVITIES:-

| | 2021 | 2020 |
|--|--------------|-------------|
| Change in net assets | \$11,965,876 | \$(60,184) |
| Adjustments to reconcile the change in total net assets to net cash used by operating activities:- | | |
| Depreciation | 2,949 | 2,373 |
| Net realized and unrealized gain on investments | 11,029,197 | (534,248) |
| (Increase) decrease in prepaid expenses | (1,032) | 1,433 |
| (Decrease) increase in accounts payable and accrued expenses | (3,182) | 438 |
| (Decrease) increase in grants and scholarships payable | (399,026) | 379,671 |
| Increase (decrease) in agent liabilities | 1,396,169 | (14,344) |
| Net cash provided (used) by operating activities | 23,990,951 | (224,861) |

CASH FLOWS FROM INVESTING ACTIVITIES:-

| | | |
|---|---------------------|---------------------|
| Net (contributions to) proceeds from investments | (24,075,467) | (1,288,183) |
| Purchases of equipment | (1,474) | (2,350) |
| Net cash (used) provided by investing activities | (24,076,941) | (1,290,533) |
| 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.



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In this issue...

- 2021 Financials
- Annual Grants Summary
- Record Year for Contributions
- TEACH & Equity Awards

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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.

