

# GOODnews



THE DAYTON FOUNDATION

We're here for good.

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Special Recognition, Performances Take Center Stage at Celebration

## New Board Chair Fred C. Setzer, Jr.

*His focus is on community service and collaboration*

**B**orn and raised in Dayton, Ohio, Fred Setzer's Dayton roots run deep. His father founded Chapel Electric Company, an electrical contracting firm, in 1946. His father was an electrician, and his mother took care of the new mom-and-pop company's books.

"They worked hard," Fred C. Setzer, Jr., said. "My dad started his day at 5:30 a.m. and wasn't back home until after 7 at night." After his parents turned the business over to him in 1964, Fred Setzer grew Setzer Corporation and its affiliated businesses out of Chapel Electric. The home office for three businesses under Setzer Corporation's umbrella remains in Dayton, and another generation of Setzers has come on board to help run the businesses – his son Rick.

But being a businessman is only part of what defines new Dayton Foundation Governing Board Chair Fred Setzer. Volun-



Fred C. Setzer, Jr.

**"FEW PEOPLE REALLY UNDERSTAND HOW INTRICATE THE DAYTON FOUNDATION IS. THERE'S SO MUCH EXPERTISE HERE, SO MUCH POTENTIAL TO HELP MORE PEOPLE AND ORGANIZATIONS DO GOOD."**

– Fred C. Setzer, Jr.

teerism is an ingrained – and deeply meaningful – part of his daily life. "It's important to me, because I feel good when I do it," he said simply. And making time to volunteer is not a last, but a primary consideration for him.

Making a difference is what he says motivates him to take on major community challenges. He has chaired four successful,

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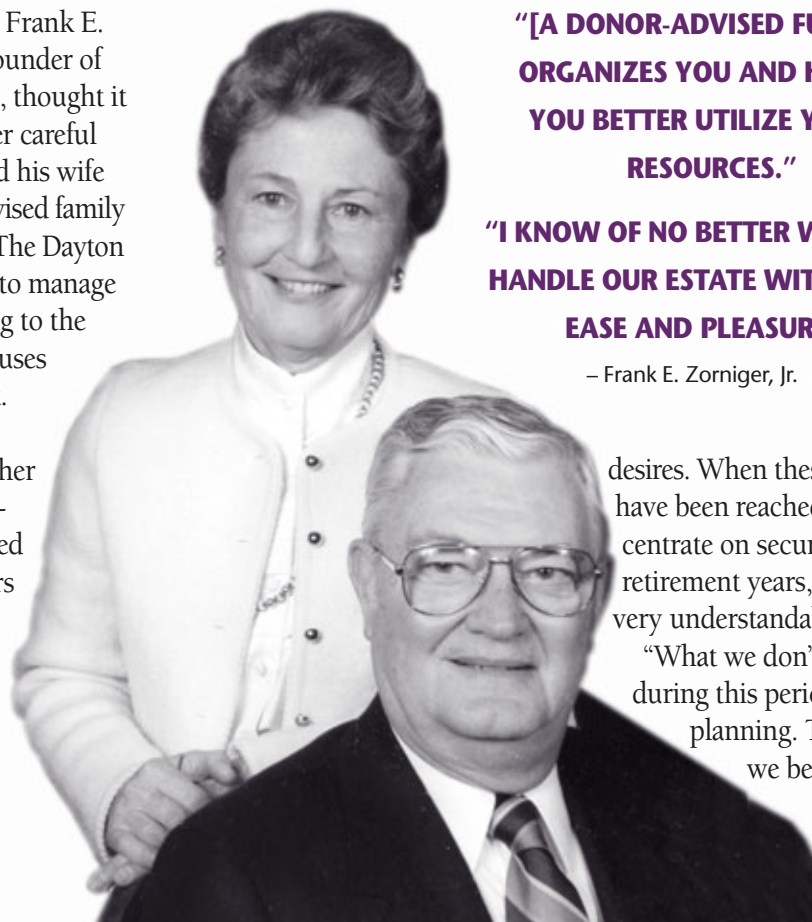
## Zorniger Family Fund

*Giving to others in a manner that "just made sense"*

**A**s a businessman, Frank E. Zorniger, Jr., founder of Frank Z Auto Group, thought it just made sense. After careful consideration, he and his wife Nancy opened an advised family endowment fund in The Dayton Foundation in 1993 to manage their charitable giving to the organizations and causes they care most about.

"Most of us," Mr. Zorniger said, "whether professional or entrepreneurial, are focused during our early years on striving to accumulate wealth and to satisfy personal

Nancy and Frank E. Zorniger, Jr.



**"[A DONOR-ADVISED FUND] ORGANIZES YOU AND HELPS YOU BETTER UTILIZE YOUR RESOURCES."**

**"I KNOW OF NO BETTER WAY TO HANDLE OUR ESTATE WITH SUCH EASE AND PLEASURE."**

– Frank E. Zorniger, Jr.

desires. When these goals have been reached, we concentrate on security for the retirement years, which is very understandable.

"What we don't focus on during this period is estate planning. The sooner we become aware

of this, the more productive we will be in eluding monstrous estate taxes and managing the direction of our hard-earned wealth.

"I finally awoke to this reality and established a family fund at the Foundation. It's exceeded our best hopes. The results have been phenomenal! Our personal estate, as well as our family fund, has continued to grow while we made additional contributions each year to the family fund."

The Zornigers wanted to make sure that they determined where their resources went after their deaths, not Uncle Sam.

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# Setzer continued

capital fundraising campaigns locally: a \$2-million capital campaign for Hospice of Dayton; the YMCA Downtown Campaign; YMCA \$4-million Capital Drive; and the more than \$3.5-million campaign to build an athletic practice facility for Wright State University.

Despite the work involved in such undertakings, Mr. Setzer focuses on the sense of privilege he feels to take part in these challenges. “To be able to do something for an organization that enables people to die with dignity, to assist a good organization [the YMCA] that gets kids off the streets, that brings families together and that a number of years ago was almost bankrupt...to help build it back up like a Phoenix rising...to, as a volunteer, be part of making this happen – this is what matters.” And now his chairmanship of the Governing Board of The Dayton Foundation provides fertile ground for what he sees as planting seeds for the growth of a strong foundation for the Greater Miami Valley’s future.

“The Dayton Foundation is such a collaboration – it’s more than a conduit for donors’ funds,” he said. It’s a mechanism, he believes, for bringing together donors to help not-for-profit organizations; nonprofits

**“I’VE GROWN UP IN DAYTON; MY KIDS HAVE GROWN UP HERE. IT MAY SOUND TRITE, BUT I’D LIKE TO LEAVE THE AREA BETTER THAN WHEN I CAME HERE...FOR MY GRANDCHILDREN AND OTHERS’ GRANDCHILDREN.”**

– Fred C. Setzer, Jr.

and foundations to tackle community challenges; and the region to unite around common problems and opportunities. Collaboration is a vital part of any successful undertaking, Mr. Setzer believes.

To provide this leadership and these services, the Foundation has put in place an impressive and diverse Governing Board and Board committees and a highly trained team of charitable giving experts. The

**“AS A COMMUNITY... WE NEED TO LOOK LONG TERM AND BE UNIFIED IN OUR OUTLOOK.”**

– Fred C. Setzer, Jr.



staff team includes people with accounting, legal and grant-making expertise, able to provide skilled assistance in working with donors and their financial and legal advisors. It also includes former nonprofit chief executives, who can work effectively with the region’s nonprofits to help strengthen their organizations and work on issues of community concern.

“Few people really understand how intricate The Dayton Foundation is,” he said. “There’s so much expertise here, so much potential to help more people and organizations do good. Mike Parks [Foundation president] is a truly gifted leader, and we have such a dedicated staff. The Dayton Foundation is in a unique position, as an organization designed to last and that exemplifies real neutrality. This makes the Foundation particularly strong in its ability to foster collaboration among people and organizations.”

The fact that so many people don’t realize how effectively and efficiently The Dayton Foundation can help them accomplish their personal charitable goals, is one of the challenges Mr. Setzer sees for his next two years as the new Governing Board chair. “I

want people to read about The Dayton Foundation, talk to friends about it and start using it, perhaps by entering as a Charitable Checking Account<sup>SM</sup> donor. There is no long-term obligation in being a Charitable Checking Account donor. The service organizes your giving, provides the opportunity for tax advantages, makes your charitable grants, does your paperwork for you... and it’s free. What I hope is that people will read what we have to say, think for themselves, then call or come talk to us, learn from us, see how much we can help them.”

“The Dayton Foundation fills a big community need. Our community faces many threats,” he said, “economic being perhaps the greatest.” The Dayton Foundation can help, he believes, by encouraging the pooling of community resources – by fostering nonprofit collaborations and by growing the number of people who establish funds to support the nonprofit community in making things better.

“The Foundation has worked quietly behind the scenes in many community ventures, which is as it should be. But people need to understand how central a role The Dayton Foundation has played in numerous, critical community projects, without which our community would not be the same. Our donors have made this Foundation a force for community good. The stronger The Dayton Foundation grows, the stronger the community will be. That’s a central understanding that I’d like to communicate.”

Increasing visibility for the Foundation and collaborations may well become the central themes for Fred Setzer’s chairmanship. He hopes that local businesses will become part



Fred Setzer and his wife, Jane, celebrating Christmas with their grandchildren in South Carolina



Photo: Wright State University

Fred Setzer (right) at the dedication of the Setzer Pavilion/Mills-Morgan Center at Wright State University in August 2005. Also pictured are (left to right) Kim Goldenberg, Wright State University president, Bob Mills, Mr. Setzer’s partner in the building of the Center, and DeShaun Wood and Brittney Whiteside, Raiders basketball players. This privately funded, state-of-the-art center provides student athletes with one of the finest training facilities in the country.

of that collaboration. “The loaned executive program to nonprofits that corporations had for years in Dayton has faltered, mainly due to economic reasons. One of the

**“TO BE ABLE TO DO SOMETHING FOR AN ORGANIZATION THAT ENABLES PEOPLE TO DIE WITH DIGNITY, TO ASSIST A GOOD ORGANIZATION – THAT GETS KIDS OFF THE STREETS [AND] THAT BRINGS FAMILIES TOGETHER – TO, AS A VOLUNTEER, BE PART OF MAKING THIS HAPPEN...THIS IS WHAT MATTERS.”**

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things I’d love to see,” he said, “is a renewal of that concept – but perhaps with recently retired executives. There is so much talent and experience out there. People want to do more than play golf when they retire. They still want to do something meaningful. I think

they’re just waiting to be asked. Maybe our community can do something about that.”

Another high priority – perhaps the highest, in Fred Setzer’s mind – is education. “We see too many kids walking the streets, with nothing to do.” Our community can change that, he believes.

“I’ve grown up in Dayton; my kids have grown up here. It may sound trite, but I’d like to leave the area better than when I came here...for my grandchildren and others’ grandchildren. We can build strong, economic roots and a caring community. As a community, however, we need to look long term and be unified in our outlook. If we do this, if we’re grounded, we can build a firm foundation that will sustain our region long into the future.”

**Fred C. Setzer, Jr.**, is a graduate of Oakwood High School and Northwestern University. He is chairman of Setzer Corporation, a management holding company for Beacon Electric Company (an electrical contracting firm), CTS Construction, Inc. (a telecommunications firm) and ESCO Technologies (a communications systems distributor). In addition to his active involvement with the organizations listed in the story above (The Dayton Foundation, Hospice of Dayton, Wright State University and YMCA of Greater Dayton), Mr. Setzer currently or previously served on the Sinclair Community College Foundation Board, St. Paul’s Episcopal Church Vestry, Dayton Art Institute Board, Carillon Historical Park Board, CityWide Board, Dayton Chamber of Commerce (past chairman) and Chief Executive’s Organization Board.

# from the President



Michael M. Parks

## A History of Innovation and Behind-the-Scenes Community Work

The Dayton region is the birthplace of countless inventions – the airplane, the automotive self-starter, the cash register, to name just a few. It has and continues to be the home of writers and artists and boasts nationally recognized performing arts groups that enrich the cultural life of our community.

What our community also has is one of the oldest and largest community foundations in the nation – The Dayton Foundation, which serves a several-county area of the Greater Miami Valley. Founded in 1921, The Dayton Foundation was a daring experiment in its time.

The Dayton Foundation has long been known for its innovative nature, which befits Dayton's rich history. The Foundation holds many firsts in its ability to adapt to the needs of philanthropic people. Among them are The Disability Foundation, which provides important planning options for families with loved ones with disabilities; private foundation alternatives – Family Foundation *Plus*<sup>SM</sup> and Family Foundation *Plus*<sup>SM</sup>-Advised; the African-American Community Fund; the Legacy Partnership Program, which helps local nonprofits build their planned and deferred giving funds; and other unique services.

### The Job Center and Other Examples

The Dayton Foundation's history also is one of working behind the scenes to move large and complex local ventures forward to benefit hundreds of thousands of area residents. A case in point is The Job Cen-

**"THE GERM OF THE IDEA THAT BECAME THE JOB CENTER BEGAN IN THE 1980s, WHEN THE FOUNDATION FORMED THE SELF-SUFFICIENCY TASK FORCE...."**

**"THE DAYTON FOUNDATION HAS LONG BEEN KNOWN FOR ITS INNOVATIVE NATURE, WHICH BEFITS DAYTON'S RICH HISTORY."**

ter, nationally recognized for its success in moving people off welfare and into new and working lives. The germ of the idea that became The Job Center began in the 1980s, when the Foundation formed the Self-Sufficiency Task Force to address the question: Why can't everyone support themselves?

As former Foundation Chair Frederick C. Smith said, it took a decade of "focus, patience and persistence," making the case again and again for comprehensive solutions to dozens of reluctant agencies.

First, local agencies in Montgomery County signed on; next, with strong support from then-Ohio Governor George Voinovich, state agencies entered into unprecedented levels of cooperation, until some 47 separate agencies were providing coordinated help to 2,000 people a day at a single site – The Job Center. And it almost didn't happen.

When the county couldn't sign a long enough lease to pay for the project, The Dayton Foundation stepped in and

formed a coalition of organizations that guaranteed payment of the loan. The Foundation's board decided to take on this risk, because we believed it was so vital to the people who so desperately needed The Job Center's services. Today The Job Center is studied and emulated by other regions around the nation and yearly helps an estimated 500,000 people from across our community.

This is just one example of how the Foundation works quietly on behalf of our region. Other examples include how The Dayton Foundation backed the bond financing that allowed the building of the Schuster Performing Arts Center to go forward; how we made a grant to enable RiverScape in downtown Dayton to hire its first planners; how we have, for example, supported the work of a violence prevention center in Xenia that gives shelter to battered spouses and aided residential and day facilities for people trying to overcome their dependency on drugs and for homeless people, respectively; how we have funded numerous and far-reaching educational projects that help teachers learn new teaching skills and to give school dropouts new educational alternatives that are helping them to succeed; how we are providing new diversity models for small- and medium-sized businesses to help businesses and minority

individuals to have expanded opportunities; among other efforts.

### Turning Possibilities to Realities Through Unrestricted Funds

What enables The Dayton Foundation to do this work is the support of donors who understand that the Foundation, as a nonprofit (public) charity, needs operating fund donations, as well as donors willing to establish unrestricted funds. Despite the Foundation's large assets, nearly \$262 million, as of September 30, 2005, only 7 percent of those assets are unrestricted.

**"UNRESTRICTED FUNDS ENABLE THE FOUNDATION... TO RESPOND TO COMMUNITY CRISES AND OPPORTUNITIES."**

Unrestricted funds make it possible for the Foundation to make grants in the community where need is greatest and undertake leadership initiatives and other efforts like those above. They help the Foundation to be able to operate, and they give us the ability to respond to community crises and opportunities.

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## A Special Thank You to Judy D. McCormick

The Dayton Foundation would like to thank Judy D. McCormick for providing outstanding leadership as chair of the Foundation's Governing Board the last two years.

Her deep commitment to her work on behalf of The Dayton Foundation, her experience and perceptiveness, and her special abilities to make fruitful connections between people throughout the community demonstrated themselves in many ways.

Mrs. McCormick led by an example of engagement, manifested in such ways as her attendance at nearly every Board-level committee meeting, in addition to subcommittee meetings and Executive Committee and Governing Board

Judy D. McCormick



meetings. She was there at major staff functions, whenever the Foundation needed her wise counsel and for numerous community functions and meetings where her presence was required. It would be hard to find a chair more steadfast and deeply committed to serving well.

She is the Foundation's first woman chair. She oversaw the revision of the Foundation's investment policies, for even greater stability and diversification. Under her leadership, the Foundation grew by \$43 million, delivered \$68 million over two years to nonprofits, grew the Legacy Partnership Program to 45 local nonprofits who are increasing the planned and deferred gifts coming to their organizations, continued

the important work of the Diversity Task Force and launched a new Board initiative, the Neighborhood School Centers Project to help rebuild neighborhoods in Dayton and assist families. And these are just some of the highlights.

It is difficult to express the depth of our appreciation for all that Mrs. McCormick has given as chair. She is what superb volunteerism and leadership are all about. We welcome her continuation on the Board for the remainder of her term and look forward to what she will continue to give to further the work of the Foundation and assist the community she loves.

Thank you, Judy McCormick.

# new Endowment Funds

Establishing a strong foundation for our community's future is a vision shared by donors who have endowment funds at The Dayton Foundation. Donors recently started the following new endowment funds to support our region and their special charitable causes, now and in the future.

**The Beth Abraham Synagogue Foundation Pure Endowment Fund** will provide long-term support for Beth Abraham Synagogue, located in Dayton.

**The Beth Abraham Synagogue Foundation Term Endowment Fund** serves to accept charitable donations for the unrestricted use of Beth Abraham Synagogue.



Building Bridges, Inc.

**Building Bridges, Inc., Legacy Endowment Fund** assures unrestricted revenue for Building Bridges, Inc., to help young men become productive members of society.



Nancy and Byron Firsdon

**The Byron and Nancy Firsdon Foundation** serves to enhance charitable, educational and community services, as directed by the donors. Following his retirement as a U.S. Air Force officer, Byron Firsdon established his own building and development company, Byron Firsdon Construction Co., Inc., in Dayton in 1973.

**The George Geis Family Fund** was established through a bequest by Lois Geis to honor her family and the memory of her father. The fund provides annual revenue to Holy Angels Church, Society for Improvement of Conditions for Stray Animals and The Humane Society of Greater Dayton.

**The Ida M. Graves Memorial Scholarship Fund\*** was established by the friends and family of Ida M. Graves, who was an inspiration to all who

knew her. Scholarships will be awarded to individuals participating in the CLIMB (Credentials and Leadership in Management and Business) Program at Wilberforce University.

**The Dave Herring Memorial Scholarship Fund** was established by Northridge High School to remember the school's former principal, coach and teacher. The fund will assist graduates to further their studies at a college, university or trade school.



Dave Herring

**The Arthur Huffer, Jr., Foundation** encourages healthy lifestyles for Germantown residents by providing financial assistance for medical screenings, educational programs, emergency assistance and other activities. This fund was made possible through a bequest by Arthur Huffer, Jr.



United Theological Seminary

**The Mary and Richard Pryor Fund** will provide a one-time charitable gift to the organizations of the donor's choice. Dr. Mary Pryor, a retired family practitioner, established this fund in memory of her husband, Richard Pryor, a founding member of the law firm of Young, Pryor, Lynn & Jerardi.

**The South Community Legacy Fund**, serving children, families and adults, will help provide a continuum of behavioral healthcare services in the Greater Miami Valley.

**The United Theological Seminary Permanent Endowment Fund** provides a source of permanent, annual operating revenue for the United Theological Seminary.



\* African-American Community Fund



Mary Pryor

## From the President continued

Despite the fact that the Foundation is one of the largest community foundations in the country, it is among the smallest in regards to the percentage of discretionary (unrestricted) dollars available to us to do our community work. We have cut operating costs and worked hard to maintain lower expenditures, but this still leaves a gap that, left unclosed, will restrict our ability to respond to community need and opportunity. It is a case we need to make to those who utilize and support The Dayton Foundation.

For the donors who have helped us by responding to our annual operating appeal – and for the donors who have set up unrestricted funds (funds that carry no restrictions on

how the Foundation uses them) – we thank you from the bottom of our hearts. We cannot do the important jobs we are called upon daily to do in our community, without your generous support. You have made possible community efforts that never would have happened. Children are better educated, people in desperate need have found jobs and shelter, and we are bringing hope to neighborhoods and families, because of you. Thank you.

### In Conclusion

In conclusion, I would like to welcome Fred C. Setzer, Jr., as the new chair of our Governing Board and to thank Judy D. McCormick, who just completed two years as the Foundation's chair. These two individuals exemplify

**"...WE ARE BRINGING HOPE TO NEIGHBORHOODS AND FAMILIES, BECAUSE OF YOU."**

volunteerism at its best.

We were so fortunate to have had Judy, our first woman chair, these past two years. She couldn't have been a more engaged, perceptive, hard-working and committed Board chair. Judy did an absolutely exceptional job and proved herself a gifted and compassionate leader. We thank her for all she has done for the Foundation and for the community and are pleased that

we will continue to have her wise counsel on the Board for the remainder of her term.

We are pleased that Fred Setzer has accepted the chairmanship. He will bring his business acumen, volunteer experience and strong community commitment to the job. The page one feature about Fred says it all. He is a gifted leader we are fortunate to have in our community and leading our Governing Board for the next two years. Welcome, Fred!

Michael M. Parks  
President

# Grants in Action

**Grants in Action recognizes the results of notable grant awards, whether large or small, and the significant impact they have on strengthening the Greater Miami Valley community.**

## ***Clothes That Work!* Boutique Helps People Dress to Impress, Gain Self-Confidence**

People know that first impressions make a difference, especially when interviewing for a job. Thanks to *Clothes That Work!*, which provides free, interview-appropriate clothing to individuals preparing for self-reliance, more than 7,600 area women and men have been dressed for success since 1998.

To take their services one step further, *Clothes That Work!* opened the doors to a resale clothing boutique in August 2005 with the support of a \$10,000 grant from The Dayton Foundation. The boutique offers stylish, but affordable, work-appropriate and casual outfits, as well as formal wear, for sale to clients and to the public.

"Thanks to so many generous individuals in the community, we receive an abundance of donated clothing, most of which is very nice, but not appropriate for a job interview," said Kym Yahn, executive director for *Clothes That Work!* "In addition to helping us reduce our inventory, the bou-



*Clothes That Work!*

tique generates income to help us become self-sufficient. Plus, we're providing valuable work experience and training in a resale environment for public assistance recipients who volunteer in the store. It's a win-win for everyone."

Said one client, "I never expected to feel so good when I put on that suit. I feel like I can do anything!"

## **Kids Stay off the Street, Gain Pride and Skills Thanks to Grant**

When the school bell signals the end of the day, after-school programs often fill a void for many working families. However, after the Huber Southwest Neighborhood Center in Huber Heights closed in 2004, many families were left with no safe, affordable alternative for their children.

Thanks in part to a \$5,000 grant from The Dayton Foundation, Camp Fire USA Greater Dayton Area Council reopened the facility in 2005 as the Camp Fire Community Family Center. The Center currently serves more than 80 students.



Camp Fire USA Greater Dayton Area Council

In addition to honing their academic studies through tutoring and homework labs, students participate in summer day camps and Camp Fire service activities, such as community beautification projects and creating quilts for homeless individuals.

"The children are thriving, the community is experiencing less crime, and the parents are thrilled at the difference that the program is making in their children's grades and behavior,"

said Keith Harrison, executive director of Camp Fire USA Greater Dayton Area Council.

Most importantly, Mr. Harrison reports, the students are more positive about their community and have taken ownership of the facility, making it "their place."

# Zorniger continued

"With taxes paid to the federal and state governments, you have no say in how the money is spent," Frank Zorniger noted. "I like to know where my money's going and have some say in how it should be disbursed."



The inner city children who helped plant 45,000 bulbs last fall at Cox Arboretum will return in the spring to see the fruits of their labors.

Among the many charitable programs and organizations that they have contributed to through their fund, the Zornigers have sponsored a bulb-planting project at Cox Arboretum Gardens and MetroParks.

Gardening has long been a passion of the Zornigers, particularly Nancy Zorniger, who is a member of the Garden Club of Dayton. A European trip in the early 1970s inspired them to bring the beauty of Holland back to Dayton.

With assistance from the Zornigers' fund, hundreds of thousands of bulbs have been planted over the years, with more than 45,000 bulbs planted last fall alone by staff, volunteers and children from Dayton's inner city. The children will return in the spring to see the fruits of their labor.

"It's a great opportunity for urban children to experience the joy and beauty of gardening first hand," said Mr. Zorniger, who is a former Cox Arboretum board member.

"Thanks to Frank and Nancy's incredible generosity and encouragement, these spectacular tulip and daffodil displays bring thousands of visitors to the park each spring," said Jay Woodhull, director of Cox Arboretum.

In addition to the ease with which grants can be made to their favorite organizations, the Zornigers like the accounting of the fund's transactions in quarterly statements, the information resource represented by the Foundation, and the fact that they can do all of their family's charitable giving

## **"THERE IS REAL ENJOYMENT IN GIVING, IN MAKING LIFE BETTER FOR OTHERS..."**

— Frank E. Zorniger, Jr.

through one vehicle.

"It organizes you," he said, "and helps you better utilize your resources." Furthermore, they were able to establish an endowment fund, set up for perpetuity, which could be advised by their children and grandchildren after their lifetimes.

"Our family is the most important thing in our life," Mr. Zorniger said. "When we set up our family endowed fund, we wanted to have the children involved in the procedure of giving back to the community in which we have made our living." Because giving back to the community that had benefited them is so important to the Zornigers, he stipulated that the fund only could be advised by family members living in the Miami Valley. "If you live here, you know the need. If you don't, you can't know it."

"There is real enjoyment in giving, in making life better for others," he said, "and we personally enjoy giving during our lifetimes and seeing the results of our gifts."

## **A Tax-Smart Way to Make a Difference**

Frank E. Zorniger, Jr., gave an example of how a person can build a substantial family charitable fund, with a modest impact on family assets.

"Let's say, for illustration purposes, that a person has an adjusted gross income of \$300,000 and that he makes a charitable contribution of \$90,000. By reducing his taxable adjusted gross income by \$90,000, he realizes a federal income tax savings of \$29,700, which means that the contribution in reality only costs him \$60,300." Also, any savings on estate taxes could reduce the cost substantially.

"If he continues to contribute to his fund at the same level each year, say for 10 years, just imagine how much this fund would grow, compounding annually – especially if the assets are held and invested for the purpose of creating a larger fund for future distributions. The fund would be significantly greater than the \$900,000 contributed, and he would realize a total of \$297,000 in federal income tax savings. More importantly, he has

## **"...THE TAX BENEFITS AND THE CONTRIBUTION BENEFITS TO THE COMMUNITY ARE FAR AHEAD OF ANY OTHER CHOICE."**

— Frank E. Zorniger, Jr.

been able to grow a sizable fund for charitable purposes, which can last for generations, at a modest cost to his estate.

"When you consider the enhanced ability of your beneficiaries to make significant charitable contributions for years to come, I think the cost is very small indeed," he noted.

"Of course, people shouldn't do this unless they feel secure about their lifetime financial situation," he commented, "but the tax benefits and the contribution benefits to the community are far ahead of any other choice – and you control where your money is spent, instead of it going to taxes. I know of no better way to handle our estate with such ease and pleasure."

# Foundation Grants Give the Gift of Life Through Art

For every vase, painting or other work of art, there is a unique story about the artist who made it.

This especially is true at We Care Arts, Inc., where each carefully crafted piece of art represents a triumph over a difficult life challenge.

Sarah, for example, had been very active in her kids' lives and in creating arts and crafts until she suffered an aneurysm, leaving her physically and emotionally disabled.

## "ART IS HEALING AND POWERFUL."

— Terry Schalnat, founder and executive director of We Care Arts, Inc.

viduals with special needs gain, or in some cases regain, a sense of accomplishment by expressing themselves through art."

"Sarah had so much to offer. She was smart, quick and funny too," said Rose, Sarah's

to create one-of-a-kind arts and crafts.

To support their efforts, The Dayton Foundation has awarded two discretionary grants totaling \$20,000. The first grant in 2003 helped to renovate their new Kettering facility, which includes a gift shop offering clients' creations for sale. A second grant in 2005 will grow their Art Café, after-work art activities for young adults with disabilities.

"In addition to the renovation, these grants are enabling us to expand our client programming, as well as our community outreach programs," Ms. Schalnat said. "Thanks to The Dayton Foundation, we are exceeding our objective to serve more clients." Currently We Care Arts serves approximately 130 clients a year, with a goal of serving 300 clients in 2006.

Through collaboration with Goodwill Industries/Easter Seals, We Care Arts teachers regularly meet with the children at All Kids, a child-care center that serves children with special needs. The teachers share stories about master artists, such as Vincent Van Gogh, who had to overcome difficulties of their own.

"The goal," Ms. Schalnat said, "is to expose the children to the idea that art can be a life-long tool for expression and creativity, even in the most difficult situations."




We Care Arts helps people turn disabilities into possibilities through art.

**"SARAH HAD SO MUCH TO OFFER. SHE WAS SMART, QUICK AND FUNNY TOO. I THOUGHT WE'D NEVER SEE THAT AGAIN, BUT THROUGH WE CARE ARTS, I SEE IT COMING BACK."**

— Rose, mother of Sarah, a We Care Arts client

"I love doing my artwork," said Carla, who is developmentally disabled and has been with We Care Arts for nearly 12 years. "The best part is we're like family here. We all really care for each other."

For Terry Schalnat, her greatest pleasure is seeing clients with a satisfied smile after completing their projects. "Art is healing and powerful," she said. 



Clients may keep their artwork or sell it through the We Care Arts gift shop, located on Wilmington Pike in Kettering.

"After working in our program, she has gained a new lease on life, finding the energy and motivation to become active again in her kids' lives," said Terry Schalnat, founder and executive director of We Care Arts. "We can help indi-

mother. "I thought we'd never see that again, but through We Care Arts, I see it coming back."

Since its creation 22 years ago, We Care Arts has helped more than 3,000 individuals with injuries, developmental handicaps or mental illness

## Tips on Charitable Giving

*Passing philanthropic values to the next generation*

## On the web



By Beth Schaeffer, senior development officer

Often charitable individuals who understand the value and importance of giving back to the community, want to promote and encourage the same philanthropic spirit among their children or grandchildren. For several Dayton Foundation donors, opening a Charitable Checking Account<sup>SM</sup> for their children has proven to be just the ticket.

Because there are no fees and no minimum balance or deposit requirements, some donors establish and fund separate Charitable Checking Accounts for their children, allowing each child the authority and independence to direct grants to charities. Other donors, who like the idea

of their children collaborating in determining how best to make a difference in the community, open a single account for their children to advise jointly. Still others include their children along with themselves, to make charitable decisions as a family. In addition, accounts to be advised by children or grandchildren can be established during the donor's lifetime or after death, with assets designated from their estates. The possibilities are many.


The ease and flexibility to direct grants as frequently as you would like and to the organizations and in the amounts that you wish, makes this service ideal for anyone. Plus, the ability to do all of this online in a secure environment through

Donor Express, as well as open an account online in a matter of minutes, makes this free service particularly attractive to young, computer-savvy adults.

To learn more about this time-saving, convenient and free service, you may go to the Foundation's web site at [www.daytonfoundation.org](http://www.daytonfoundation.org) or call me, Beth Schaeffer, senior development officer, at The Dayton Foundation at (937) 225-9956. To open an account online, just look for our home page link to the Charitable Checking Account application.



Visit The Dayton Foundation's web site for this recently added feature.

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# Special recognition, performances take center stage at Foundation's Biennial Celebration

Dazzling performances from local arts organizations and a special recognition of John E. Moore, Sr., and Frederick C. Smith made The Dayton Foundation's 2005 Biennial Meeting – "Celebration: The Art of Giving!" – an evening to remember!

**"YOU DID IT AGAIN! THE BIENNIAL EVENT WAS WONDERFUL – CONGRATULATIONS!"**

– Burnell R. Roberts, donor and Emeritus Governing Board member

More than 500 donors and other friends of the Foundation gathered at the Benjamin and Marian Schuster Performing Arts Center on November 3. Judy D. McCormick, then chair of the Foundation's Governing Board, welcomed guests, while President Michael M. Parks



Top photo (left to right): Michael M. Parks, John E. Moore, Sr., Frederick C. Smith and Judy D. McCormick. Above (left to right): Nick and Bea Davis, Bruce Kreinbrink and Taryn Frederick

gave the Report of The Dayton Foundation and told how the Foundation helps donors fulfill their art of giving for the benefit of our community.

Guests gave former Governing Board Chairs John E. Moore, Sr., and Frederick C. Smith a standing ovation for their decades of extraordinary service to the Foundation and to the region. In addition to scrapbooks filled with special letters from friends and colleagues across the community, grants were made in their honor: one to the African-American Community Fund, in John and Hester Moore's honor; the other to The Pfeife Smith World Affairs Scholarship Fund, in Fred and Pfeife Smith's honor.


Following spectacular performances by Dayton Contemporary Dance Company, The Human Race Theatre Company and Rhythm in Shoes, guests adjourned to the Wintergarden for a wine and light

**"I HAD A MARVELOUS TIME AT THE BIENNIAL MEETING...IT WAS A TREMENDOUS SUCCESS. EVERYONE I SPOKE WITH FELT THE SAME WAY."**

– Robin McCall, Morgan Stanley



Dayton Contemporary Dance Company

supper social, featuring The Eddie Brookshire Trio and an exhibition by the Dayton Visual Arts Center. 

## Recent Discretionary Grants support worthy community causes

The Dayton Foundation Governing Board recently approved discretionary grants totaling \$232,600 to 17 charitable organizations within the Miami Valley. These grants, made possible by donors who have placed no restrictions on their endowed funds, help the Foundation to address unmet needs in our community. Discretionary grants represent a small portion of the more than 15,000 grants (\$33.6 million last year) awarded to charities annually from Foundation funds, as directed or advised by donors.

### Catholic Social Services



### AIDS Resource Center of Ohio

To assist the Center in relocating to the Kuhns Building in downtown Dayton, The Dayton Foundation awarded a \$20,000 grant. This new, larger, handicapped-accessible office will enable the Center to offer more programs and services.

### Building Bridges, Inc.

Thanks to a \$15,000 Dayton Foundation grant, Building Bridges, Inc., will purchase new marketing materials and computer software to help increase public awareness and financial support for their work-therapy programs for troubled youth.



Dayton Philharmonic Orchestra

### Catholic Social Services

A \$15,000 Dayton Foundation grant will help Catholic Social Services develop a volunteer program, including creating recruitment materials, training volunteers in outreach programs and developing a Junior Board for young working individuals and families.

### Dayton Philharmonic Orchestra

A \$20,000 Foundation grant will aid the Orchestra in publicizing free and discounted chamber performances at various churches and community centers. The performances will

celebrate the 250th anniversary of Wolfgang Amadeus Mozart's birth.

### Goodwill/Easter Seals Technology Resource Center

The Foundation awarded a \$15,300 grant to the Center to help the Committee to Aid the Blind in its efforts to meet the needs of Greater Dayton-area residents with visual impairments.

### Home Based Arts USA, Inc.

More than 7,000 first- through fifth-grade Dayton Public School students will receive social studies activity books highlighting state and local

history, thanks to a \$10,000 Dayton Foundation grant to Home Based Arts USA, Inc.

### Hospice of Dayton Foundation

A \$30,000 Foundation grant will assist Hospice of Dayton establish Focused Care, a disease-management program providing specialized cardiology, oncology and geriatrics treatment to terminally ill patients in their homes.



Kettering Children's Choir

### Kettering Children's Choir

A \$5,000 Dayton Foundation grant will help defray personnel

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The Regional Community Foundation

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**President:** Michael M. Parks. **Governing Board:** Fred C. Setzer, Jr., *chair*, Thomas G. Breitenbach, Franz J. Hoge, Ellen S. Ireland, Charles A. Jones, Helen Jones-Kelley, Jamie King, Leo E. Knight, Jr., Gary L. LeRoy, Judy D. McCormick, Laura B. Pannier, Douglas C. Scholz, Richard W. Schwartz, Jerome F. Tatar, Fred E. Weber. **Financial Managers:** Adams Financial Group; Ameriprise Financial Services, Inc.; Baird Investments; Behnken and Associates, Inc.; Buckingham Financial Group; C.H. Dean and Associates; Dover Partners; Eaton National Bank; A.G. Edwards & Sons, Inc.; Eubel, Brady & Suttman Asset Management; Fifth Third Bank; Financial Counseling Incorporated; First Alliance Asset Management Access Financial Group; Gradison-McDonald; The Huntington; Investment Management and Research; James Investment Research, Inc.; JP Morgan; Key Bank, NA; K H B Corporation, Inc./Bear Stearns & Co., Inc.; Legg Mason Wood Walker, Inc.; Liberty Savings Bank, FSB; Linsco/Private Ledger Financial Services; McDonald Investments, Inc.; Mead, Adam & Co., Inc.; Merrill Lynch and Company; Michael J. Monaghan & Associates; Morgan Stanley; National City Bank; Northwestern Mutual Fund Services; Oxford Financial Advisors Corp.; PNC Bank, Ohio, NA; UBS Financial Services, Inc.; Parker Carlson & Johnson; Prudential Preferred Financial Services; Sagemark Consulting, Inc.; Smith Barney; Spears, Grisanti & Brown, LLC; Transamerica Investment Management, LLC; Truepoint Capital, LLC, US Bank; Wachovia Securities; Westminster Financial Securities; A.T. Whitehead.

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**Special Recognition, Performances Take Center Stage at Biennial Celebration**

## Recent Grants continued

costs of Dayton Philharmonic Orchestra members who will accompany the Choir at their 20th anniversary concert in May.



Kids in New Directions

### Kids in New Directions (KIND)

The Foundation awarded a \$15,000 grant to aid KIND in expanding their after-school activities in East Dayton, including English classes for Hispanic children and Spanish classes for English-speaking children.

### The Learning Tree Farm

To help address childhood obesity, Learning Tree Farm is engaging children in fitness

activities, such as relay races and obstacle courses, using farm tools and equipment. The Foundation awarded a \$10,000 grant to develop these programs.

### Miami Valley Hospital Foundation

A \$5,500 Foundation grant will help defray the costs of a new, sexual assault, response-team manual, which will be used by law enforcement agencies and other agencies throughout Montgomery County.

### Ohio Presbyterian Retirement Services

To aid in monitoring the health of residents at six Greater Dayton senior retirement centers, the Foundation awarded a \$10,400 grant to purchase a specialized telephone- and video-monitoring system.

### Oregon Historic District Society, Inc.

The Foundation awarded a \$6,400 grant to the Society to assist in the production of Oregon Stories, a documentary chronicling the rich history of Dayton's Oregon Historic District.



United Way of the Greater Dayton Area

### Unified Health Solutions

A \$10,000 grant will assist Unified Health Solutions in addressing the academic and social needs of youth through after-school, weekend and summer programs, with an emphasis on reading, science and math.

### United Way of the Greater Dayton Area

The Dayton Foundation awarded a \$10,000 grant to stimulate new and increased

gifts to the United Way Campaign through a challenge grant program. Challenge grants will fund programs and projects that address new and emerging community needs.

### We Care Arts, Inc.

Thanks to a \$10,000 Foundation grant, We Care Arts will offer more Art Café after-work art activities, which provide social opportunities for young adults with disabilities.

### YWCA of Dayton

The Foundation awarded a \$25,000 grant to aid in the construction of a child-care center at St. Vincent Hotel. The center will provide activities, health assessments and other services for homeless children in the area.