College Promise Program
“With education, all things are possible”

An idea is a seed. It is filled with potential. But when it becomes a vision and commitment fuels it – that is a very powerful thing indeed.

Longtime Dayton Foundation donor and former Governing Board member John N. Taylor, Jr., had witnessed many programs at work to make people’s lives better. But in Florida, he observed a program in action that offered underprivileged children who showed academic promise a unique and life-changing opportunity to break the bonds of poverty.

It was Florida’s 15-year-old Take Stock in Children Program and the success it had with thousands of underprivileged children that got his attention. The program provides scholarships, mentors and other support to give hope to these children. “I studied the program for five years. The kids and their parents sign a contract when they’re in the eighth grade. Their success rate shocked me – 92 percent graduated from high school,” he said, 61 percent higher than Florida’s state average for at-risk students.

FROM THIS EXPERIENCE CAME THE SEED OF AN IDEA. WHY, HE ASKED HIMSELF, COULDN’T WE START A PROGRAM LIKE THIS IN MONTGOMERY COUNTY?

pg. 2
Kreusch Memorial Fund: Helping Children Smile

pg. 5
Giving Through Time

pg. 6
Caring for Alzheimer’s Patients Made Easier, Thanks to Grant

from the President
90 Years of Helping People Help Others

When Dr. D. Frank Garland watched the beginning of the first community foundation in Cleveland in 1914, he must have known he was witnessing the birth of something big.

Dayton’s NCR director of welfare at that time and an active civic leader, he followed the Cleveland Foundation’s development and came to believe that it was just what Dayton needed. In an effort to build support, he wrote to 10 prominent Daytonians, including John H. Patterson, asking for $10 each for the creation and dissemination of pamphlets putting forward the idea.

Patterson, founder and chairman of NCR and a highly progressive industrialist and citizen, likewise saw almost immediately the potential of a community foundation that would involve both large and small givers in bettering the community. He enlisted his sister-in-law, Julia Shaw Patterson Carnell, and nephew, Robert Patterson, to join him to contribute a total of $250,000 to help create The Dayton Foundation on April 5, 1921, and seed it with its first unrestricted endowment.

I suspect that John H. Patterson and his family would have been pleased indeed to have learned that nine decades later, The Dayton Foundation includes 3,000 committed donors and $370 million in community assets under management (an all-time high), granting more than $30 million a year to charity and the betterment of their community.

Over 90 years, The Dayton Foundation has continued to evolve in the progressive manner in which Dr. Garland and the Patterson family operated. And true to the original design to involve donors from all walks of life, brought together by a common purpose to help their community, The Dayton Foundation “…TRUE TO THE ORIGINAL DESIGN TO INVOLVE DONORS FROM ALL WALKS OF LIFE,...THE DAYTON FOUNDATION HAS CONTINUED TO UPHOLD THE VALUES OF INCLUSIVENESS AND COMMITMENT TO THE GREATER GOOD.”

continued on page 3
continued on page 5
Mark Andrew Kreusch Memorial Fund

Parents keep son’s memory alive by helping other children smile

Suzie Kreusch believes in “silver linings.” When she and her husband Jon lost their four-year-old son Mark in a boating accident in 2007, it was this belief that led them to find the positive in something so unmistakably tragic.

“Mark had a zest for life that showed through in his smile and giggle,” Suzie Kreusch said. “We want to carry on his spirit by doing things in the community that put smiles on other children’s faces, especially those who are less fortunate.”

The Kreusch family’s desire to help children also was fueled by others who wanted to do something in Mark’s honor. When they learned of his passing, friends and family, including Jon’s place of employment, Commercial Heat Treating of Dayton, Inc., began their legacy to the community by establishing a permanent, unrestricted endowment with The Dayton Foundation. Since 1998, the Robert H. and Enis N. Kissinger Fund has awarded more than $488,000 to support local charities and Dayton Foundation leadership initiatives and will continue to help local citizens in perpetuity.

We are privileged to serve the Kissingers and all of our Foundation fund donors.

Robert and Enis Kissinger had a strong desire to put their charitable funds where the community would need them the most. This letter, penned in 1987 by the Kissingers, former owners of Commercial Heat Treating of Dayton, Inc., began their legacy to the community by establishing a permanent, unrestricted endowment with The Dayton Foundation.

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**Promise continued**

Montgomery County Scholarship Program (DMCSP), a longtime and highly respected program within our community and an affiliate of The Dayton Foundation.

Ned Sifferlen liked what he heard and looked into it further. He brought the concept to the DMCSP Board, which today also serves as the advisory committee overseeing the new Montgomery County Ohio College Promise (MCOCSP) program. Dr. Donald Thompson, executive director of the DMCSP said, “It was perfect synergy to pull a scholarship program with this much potential under the wing of DMCSP. We foresee the College Promise program having great success.” And so an alliance of vision was born, and the idea took root and began to grow.

Its mission over 10 years is to identify, select and support up to 500 Montgomery County eighth graders from low-income families, children who have shown academic promise, so they can realize the dream of attending and graduating from college.

The program’s new director is Gary Smiga, former superintendent of Centerville City Schools. “We’re targeting 40, possibly up to 50 eighth graders this first year and then 40 to 50 each year thereafter for 10 years, for a total of 500 over 10 years.”

Students and parents have to agree to do their part to stay in the program. “The single most important element of the program,” he said, “is that each child will receive the support of a caring, trained and supportive adult mentor who will meet with the child weekly and stay with him or her throughout the program. Those completing high school and meeting college entrance requirements will receive full college scholarships.”

Key to the program, Dr. Sifferlen noted that The Dayton Community College Board of Trustees for a number of years, he had seen at Sinclair what opportunity could do “to give kids a chance in life.” So it was only natural that he went to talk to former Sinclair Community College President Dr. Ned Sifferlen, who chairs the Board of Trustees of the Dayton-
Establishing a strong foundation for our community’s future is a vision shared by those who have endowed funds at The Dayton Foundation. The following funds are some of the new endowment funds established by donors in recent months to support our region and their special charitable causes, now and in the future.

Steffen Brown Foundation Fund carries out a longstanding family tradition of serving the community’s educational needs and will include grants to the University of Dayton for a scholarship fund and other leadership and educational programs. This field-of-interest fund was converted from a private foundation of the same name by the children of Steffen and Marrianna Brown.

Orville M. Cotterman Charitable Fund provides operating funds to the Historical Society of Vandalia-Butler and Vandalia United Methodist Church. Orville Cotterman, a retiree of Frigidaire and a former Vandalia City councilman and School Board member, was a life-long resident of Vandalia until his passing in 2010.

Dayton Catholic Women’s Club (DCWC) Scholarship Fund aids graduating high school women of the Roman Catholic faith in furthering their education at institutions of higher learning. DCWC was established in 1923 to promote a spirit of unity and cooperation among Catholic women in religious, educational, social and humanitarian interests and benevolent works.

Donors establish funds to help others

Sara Kimmel Lytle Lytle-Kimmel Fund initially awards grants to the donor’s designated charities and eventually becomes an unrestricted fund to enable The Dayton Foundation to help meet changing community needs. The fund honors the memory of Sara Kimmel Lytle, a life-long member of St. Mary’s Episcopal Church, and her husband, Mason Hooker Lytle. The Lytles were married for 64 years.

Montgomery County Ohio College Promise (MCOCP) Fund supports a program developed in cooperation with the Dayton-Montgomery County Scholarship Program, Sinclair Community College, Wright State University and other local partners. This program seeks in the next 10 years to identify, select and support up to 300 Montgomery County, poverty-impacted, eighth grade students who have shown academic promise so that the dream of attending and graduating from college becomes a reality.

Moraine Rotary Scholarship Fund awards scholarships to graduating high school seniors living in Moraine who have been accepted to two- or four-year colleges or universities.

Muse Machine Fund in Honor of Moses Hogan and Mary-Kate Tews provides an annual scholarship to a senior Muse Machine musical cast member to continue his or her studies in music, acting or dance. The fund was established in memory of Moses Hogan, a world-renowned composer, and Mary-Kate Tews, an artist and educator who helped in planning for the 1996 Summer Olympics in Atlanta.

Dayton Metro Library Dayton Metro Library Endowment Funds provide annual operating funds to enrich the lives of all residents through library programs, including purchasing books and media, hosting speakers and other events, and enhancing spaces for reading, learning and community dialogue.

Friends of the Greater Downtown Dayton Plan Fund furthers the charitable work, projects and initiatives of the Dayton Downtown Plan of 2010 by providing funds to promote the revitalization and economic development of downtown Dayton.

Friends of Ohio’s Great Corridor Fund helps promote opportunities for urban and rural communities to cooperate and bring vitality along the Great Miami and Mad River corridors.

Friends of St. Albert the Great Catholic Church Fund seeks to support this longtime Kettering church by providing annual, unrestricted operating revenue. Established in 1939 with fewer than 50 parishioners, the church’s current community includes 2,300 families.

The Hausfeld Family Kacie and Tom Hausfeld Scholarship Fund helps Archbishop Alter High School graduates further their studies at the University of Dayton (UD). The fund was established by friends and family and serves to remember Tom Hausfeld, a retired business owner and active Alter High School volunteer, and his daughter, Kacie, an Alter High School graduate and UD volleyball player, who perished in a plane crash in 2010.

Marianna K. Oliver Fund honors the memory of this former Oakwood resident and St. Paul Episcopal Church member by designating funds to Daybreak, Inc., in perpetuity.

Alvarene N. Owens Endowment Fund will support charitable activities of the donor’s choosing. Alvarene Owens, a longtime Dayton attorney, was the first woman and minority to be appointed to the Board of the Ohio Academy of Trial Lawyers.

Elisabeth and John E. Purdy John E. and Elizabeth Purdy Fund, established from the remains of a Charitable Remainder Trust and a Pooled Income Fund, will help meet pressing needs in the Greater Dayton Region, as identified by The Dayton Foundation. John “Jack” Purdy, a World War II veteran and founder of Dayton Showcase Company, and his wife, Elizabeth, were married for nearly 58 years.

Three Valley Conservation Trust Fund for Scholarships (in memory of Frank and Esther Breen Senicka and James and Anne Ruder Bever) grants funds to the Three Valley Conservation Trust for the purpose of awarding scholarships for accredited post-secondary education.

Virginia B. Toulmin The Harry A. Toulmin, Jr., and Virginia B. Toulmin Fund perpetuates the Toulmin’s passion for the Greater Dayton Region by enabling the Governing Board to award discretionary grants where the community most needs them. Virginia B. Toulmin, an exceptional philanthropist and businesswoman, established the fund, which serves to remember her and her husband. Harry A. Toulmin, Jr. was a successful attorney and business owner and the son of the attorney who secured and defended the patents for the Wright Brothers’ flying machines.

UTE-Pohly Center Fund provides annual financial support to the United Theological Seminary’s Pohly Center for Supervision and Leadership Formation.

* African-American Community Fund
Throughout the Foundation’s 90 years – Giving for Yesterday, Today and Tomorrow

Since 1921, the Dayton Foundation, on behalf of Foundation donors, has awarded more than 225,000 grants totaling nearly $567 million – $366 million in the last 10 years alone. From these grants have emerged tremendous efforts to make our community a better place to live. One can say that in one way or another, the Dayton Foundation has touched the lives of nearly everyone in our region.

From the beginning, the Foundation focused its discretionary grantmaking on projects that would help those who needed it most or where opportunity was greatest. Grants to provide free dental clinics during the Great Depression, special scholarships for children suffering from polio, and counseling services for World War II veterans were just a few such projects.

Also of considerable support during the early years were camps and other children’s programs. In 1927 the head of Dayton’s Boy Scout Council wrote, “That $300 voucher we received from The Dayton Foundation this morning will give 51 orphans a million dollars worth of fun.”

During World War II, when many parents were serving in the military or working in the factories, the Foundation funded “Day Gang” after-school programs to keep youth off the streets.

Reflecting the Foundation’s vision for improving the quality of life in the city, substantial support was given to the Dayton Research Association during the 1920s and 1930s. Operating as a “watchdog” for local governments, the Association embarked on a three-year investigation of the Montgomery County Board of Elections, accused of inefficiency, mismanagement and, possibly, influence by the Ku Klux Klan. Thanks to nearly $30,000 in grants from the Foundation, the Association’s study resulted in a more honest and efficient elections board, whose operations served as a national model.

At the decades passed, the Dayton Foundation’s leadership role took shape with more funding dedicated to groundbreaking programs and projects. To address the growing threat that alcohol and narcotics posed to area youth in the 1950s, the Foundation funded the Committee on Narcotics, the first such committee in Ohio, and awarded grants for educational programs that would prevent young people from developing habits or behavior that might lead to substance abuse.

In the 1980s, the Foundation funded the Commission on Narcotics, the first such committee in Ohio, and awarded grants for educational programs that would prevent young people from developing habits or behavior that might lead to substance abuse.

The 1980s welcomed a new era of community commitment for the Foundation, as its assets grew from $3 million in 1980 to $540 million by 1990. Innovative initiatives from this point forward were far-reaching and enabled the Foundation to proactively solve immediate issues.

In the late 1980s, the Foundation funded the Dayton Self-Sufficiency Program, an in-depth study of the impediments to self-sufficiency that led to the creation of the Montgomery County Job Center in 1997. Today it houses 47 agencies and serves an estimated 2,500 people a day – more than 3 million since its inception.

Throughout the Foundation’s 90 years, discretionary grants through the years have helped strengthen our region and give hope to those in need. It’s worthy to note the collaborative manner in which this initiative took hold. The Dayton Area Chamber of Commerce, the universities, Sinclair Community College, the county, the city, the Dayton Business Committee and a very supportive group of private funders all came together under a common goal and demonstrated the collective power of working together. This exemplifies exactly what we believe our region needs to meet the challenges and opportunities of the future.

In October, an important new chapter began when the Dayton Area Chamber of Commerce brought MEDC into its structure and gave it a new name, the Minority Business Partnership (MBP). It now is one of the specialized services that the Chamber offers to area companies and will create new joint ventures between minority- and majority-controlled companies. Chamber President and CEO Phil Parker has stated that this will “champion diversity and inclusion practices and culture in companies’ strategic purchasing and workforce plans for the future," while “growing the pie for all participants.”

We could not be more pleased to have Phil Parker and the Chamber’s leadership at this crucial juncture. Their leadership and connections will allow a deliberate and ongoing effort to further the MBPs’ work and grow the future of both minority- and majority-owned businesses in our region. I commend the Chamber for stepping up to lead on this critical regional issue.

Finally, in our 90th Anniversary year, we’d like to give special thanks to all of our donors who have made the Dayton Foundation what it is today – a collective force for good and a collaboration of spirit of the largest and best kind – and our many volunteers, and staff members who have forwarded the Foundation’s work over the decades. In this spirit, we’d like to welcome new Governing Board member Jim Pancost, the recently named president and chief executive officer (CEO) of Premier Health Partners. His executive and community experience will be very helpful to the Foundation as we go forward.

Special thanks go to three outgoing Board members – Tom Breitenbach, Fred Setzer, Jr. (who also served as a former Board chair) and Rick Schwartz – all of whom gave more of their time and talent to the Foundation and our community than we can begin to recount. We wouldn’t be the Foundation we are today or have accomplished as much without these three tireless and talented volunteers. Our deep appreciation goes to them for all they have done – and continue to do – and to all of our dedicated donors and volunteers who every day make our region better for all of our citizens.

President continued
decades has been an evolutionary way of expressing those values. A recent initiative has been in the area of diversity and inclusion, specifically in regard to growing minority business economic development. This exemplifies exactly what we believe our region needs to meet the challenges and opportunities of the future.”

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Michael M. Parks, president
Getting Started with The Dayton Foundation
Create a charitable legacy by donating closely held stock

By Joseph B. Baldasare, MS, CFRE, vice president, Development

A growing number of businesses—some say half or more of the businesses in the United States—are classified as closely held businesses with S corporation stock, which is not publicly traded. When a small business owner considers selling his or her company, he or she may want to consider donating shares of the company’s stock at the appraised, fair market value to establish a charitable fund through The Dayton Foundation. By doing so, the business owner could benefit from significant tax savings and then use his or her Dayton Foundation fund to benefit the charities he or she cares about most and to make a lasting philanthropic legacy.

By donating the stock, versus selling it outright, the business owner receives a valuation of the stock and may avoid paying long-term capital gains taxes on the difference between the cost basis and today’s value. For businesses that have very little cost basis beyond their sweat equity, this can be a significant savings.

The donation can be used to establish a named endowed fund through The Dayton Foundation to benefit the charities or causes the business owner cares about most in perpetuity or a Charitable Checking Account® to help fulfill the owner’s current charitable giving needs.

For example, John Donor is thinking about selling his company and retiring so that he may enjoy the fruits of his labor. He holds 1,000 shares of the company’s S corporation stock that would be purchased by the company upon his retirement, most of which will fund his retirement years. Mr. Donor also deeply cares about continuing to provide for his church and the local hospital, so he decides to establish a charitable fund in his and his wife’s name through The Dayton Foundation. Most of his personal net worth is in his company, so to seed his charitable fund, he decides to donate 100 shares of his S corporation stock to the Foundation. Typically the company will buy back the stock from The Dayton Foundation at an agreed-upon price, and the assets from the sale will be placed in the donor’s Dayton Foundation endowed fund. The Dayton Foundation then will manage the charitable fund according to Mr. and Mrs. John Donor’s wishes, making annual distributions to the hospital and their church in their name, in perpetuity.

With gifts of closely held stock, the IRS requires an impartial appraisal if the deduction claimed exceeds $10,000. This is a broad overview of how to use S corporation stock to make a charitable gift for current and future giving. More information is available on our website at www.daytonfoundation.org/clsstocka.htm.

As you consider your plans, you or your professional advisor may contact me, Joe Baldasare, vice president of Development, to discuss this and other charitable gift options through The Dayton Foundation to meet your individual charitable goals. You can reach me at (937) 225-9954, or at jbaldasare@daytonfoundation.org.
Founders
The Beginning of The Dayton Foundation in 1921

When The Dayton Foundation was established in 1921, the concept of a charitable foundation to meet the needs of a rapidly growing and changing society was not widely known. Harnessing the collective power of a community’s philanthropic means to effect change where it was needed most was a concept first embodied in the Cleveland Foundation in 1914.

Locally, Dr. D. Frank Garland, then-director of welfare for the National Cash Register (NCR) Company, long-time social activist and the person who first raised awareness of the idea in Dayton, found a supporter in his boss, NCR founder and Chairman John H. Patterson. For decades, Patterson championed innovative projects for the betterment of the community and pioneered the first corporate employee benefits program in the nation, extending his social welfare ideas into the region. The idea of a community foundation was intriguing to him and provided a permanent solution to benefit his hometown and the region where he made his success. As he once said, “I endow people. My best investments are in humanity.”

Joining him in his enthusiasm was his sister-in-law, Julia Shaw Patterson Carnell, and nephew, Robert Patterson, son of John Patterson’s brother, Carnell. Patterson was a senior executive at NCR and a leader in community affairs.

Daybreak ($200,000) to assist in establishing a group home with mental health and support services for runaway and homeless youth.

Dayton Contemporary Dance Company ($10,000) to support the Steps on the Stairs youth education program that illustrates the life, work and times of Paul Laurence Dunbar.

Dayton Crayons to Classrooms ($15,000) to help expand their services in the region by providing basic school supplies to nine additional schools.

Dayton Tooling & Manufacturing Association (DTMA) Foundation ($8,000) to help students gain practical knowledge of math, science and engineering by building remote-controlled robots.

Good Neighbor House ($10,000) to assist in expanding its dental services to the growing number of individuals in need in Montgomery County.

Goodwill Easter Seals Miami Valley ($15,000) to help provide career counseling, assistive technology devices and training in the use of technology for youth with visual disabilities.

Life Enrichment Center ($10,000) to support the development of the East Side Nonprofit Resource Center, in cooperation with the Life Resource Center and other nonprofits. This effort is part of The Dayton Foundation’s Nonprofit Alliance Support Program.

Ohio Historical Society ($15,000) to help repair windows in the historic Carnegie Library, which houses the National Afro-American Museum and Cultural Center.

YMCA of Greater Dayton ($25,000) to assist in building a new recreation hall at Camp Kern to expand its indoor programming space for youth and small groups.

In the second half of 2010, The Dayton Foundation awarded more than $16.5 million in grants from donor funds to a wide variety of charitable organizations in the Greater Dayton Region and beyond. A portion of this amount was made through the Foundation’s discretionary grants program, made possible by donors who have provided unrestricted or largely unrestricted funds to The Dayton Foundation to act on opportunities for the community and address pressing needs throughout the region.

In December the Foundation awarded $148,000 in discretionary grants, which are approved by the Foundation’s Governing Board, to assist the following charitable organizations in helping Greater Dayton:

AIDS Resource Center Ohio ($20,000) to help explore a possible alliance with the Columbus AIDS Task Force to reduce duplication of efforts and costs, as well as enhance programming.

Dr. D. Frank Garland
John H. Patterson
Robert Patterson
Julia Shaw Patterson Carnell

Recent Discretionary Grants help enhance our community’s future

Montgomery County.

Good Neighbor House

Life Enrichment Center

Goodwill Easter Seals Miami Valley

Dayton Contemporary Dance Company

Anna S. M. Comprehensive Health Center ($10,000) to support the development of the Life Skills Program for high school students.

Local Initiatives ($10,000) to support the Steps on the Stairs youth education program.

Nonprofit Alliance Support (PTMA) Foundation ($8,000) to help students gain practical knowledge of math, science and engineering by building remote-controlled robots.

Ohio Historical Society ($15,000) to help repair windows in the historic Carnegie Library, which houses the National Afro-American Museum and Cultural Center.

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The Dayton Foundation News

Foundation's Governing Board Welcomes a New Member

James R. Pancoast

James R. Pancoast, president and chief executive officer (CEO) of Premier Health Partners, has been named to The Dayton Foundation Governing Board.

Mr. Pancoast’s career in healthcare administration has spanned more than 30 years and includes positions as president and CEO of Good Samaritan Hospital and Samaritan Health Partners, executive vice president and chief operating officer of Good Samaritan Hospital, president of Premier HealthNet and president of Fidelity Health Care.

Among his many community and not-for-profit affiliations, Mr. Pancoast currently serves on the boards of the Dayton Area Chamber of Commerce, the Montgomery County Human Services Levy Council and The Dayton Art Institute. He also serves on the regional policy board of The American Hospital Association.

The Dayton Foundation’s 2010 Biennial Meeting Celebration was a great way to kick off the Foundation’s 90th Anniversary.

Donors and friends of the Foundation gathered at the Benjamin and Marian Schuster Performing Arts Center on November 9 to celebrate this momentous occasion, called ‘Celebration! 90 Years of Giving for Yesterday, Today and Tomorrow’.


To view the video, visit the Foundation’s website at www.daytonfoundation.org/videos.html.

James R. Pancoast
President, Premier Health Partners
Nominated by: Premier Health Partners

Biennial Celebration Event Kicks Off Foundation’s 90th Anniversary with Record Attendance

Dazzling performances from local arts organizations, the premiere of the Foundation’s newest video and nearly 700 guests – more than any previous Foundation event – made

“YOU CELEBRATED THE HEART OF THIS COMMUNITY.”
– Jay Woodhull, director, Cox Arboretum MetroPark

Nearly 700 guests celebrated at The Dayton Foundation’s 2010 Biennial Meeting at the Schuster Center.

Is the information on this label correct? If not, please call (937) 222-0410.