from the President

The Big Picture on Grantmaking

I am about to tell you a little-known fact. In the last 10 years, The Dayton Foundation has made more than $300 million in charitable grants and distributions.

Now I’ll tell you another little-known fact. During the last decade, $8 million in grants has gone to nonprofit organizations through the Foundation’s discretionary grantmaking process, that the Governing Board and its Grants and Programs Committee oversee. The remaining $292 million has come from funds advised or directed by donors to support the charities about which they care most deeply.

Three hundred million dollars is quite an astonishing amount of grants and charitable work made possible by the 2,700 donors whose 2,200 funds make up The Dayton Foundation. That’s an average of more than $135,000 in charitable distributions per Dayton Foundation grantmaking fund over the last decade. That’s nothing short of remarkable – and little-known fact number three.

What we are most known for regarding grantmaking, however, is not the sum total of our grantmaking, but the smallest portion of it: our discretionary grants, typically under $1 million a year. That’s less than one-thirtieth of all the grantmaking and charitable distributions from The Dayton Foundation to support nonprofits. That’s little-known fact number four.

This grantmaking, called discretionary because it’s left to the discretion of the Governing Board to determine where community need is greatest, is made possible by donors who have set up unrestricted or field-of-interest funds. The latter allows the Board to make grants within the donor’s area of interest – education, the environment, health, for example.

This is a critical area of grantmaking for the Foundation, because it allows us to use our knowledge to attack important community problems and capitalize on opportunities to make our community better.

The Dayton Foundation is in the minority among the nation’s more than 700 community foundations in regard to the unusually small percentage of unrestricted, compared to restricted, assets. What also lends perspective is that during the time The Dayton Foundation experienced its major growth – from $5 million in the early 1980s to over $280 million today – a space of less than 25 years – was a time when donors all across the country tended to want to restrict their funds to particular charities. That’s little-known fact number five.

While we recognize the importance of growing unrestricted funds and urgently hope to do so as we educate donors and potential donors to the community value of these types...

continued on page 2

Robert and Helen Harmony Fund for Needy Children

Helping Kids To Be Kids

Summer camp is a magical experience for many children. But kids with special needs or health issues may never have the opportunity to sing around a campfire, paddle a canoe or take night hikes with friends if their families are burdened by health-care expenses or concerned about their children’s well-being while away at camp.

“Sending Matt to Camp Kom-Man-She gave us peace of mind, because we knew our son was with camp staff who understand diabetes,” said Elisa, the mother of 12-year-old Matthew, who attended the Diabetes Association of the Dayton Area’s camp.

“The Dayton Foundation work to capitalize on opportunities to make our community better. The Robert and Helen Harmony Fund for Needy Children, more than 380 children, like Matthew, were able to attend either traditional resident or health-related camp programs last year. Since the fund came to fruition in 1998, a total of $388,000 has been awarded to assist nearly 3,000 children, who otherwise could not go to camp. Staff at The Dayton Foundation work to fulfill the wishes of the Harmonys, former production workers whose legacy is ensuring that more children experience the joy of camp.

continued on page 3
From the President continued

educate the public to the fact that administering restricted funds is a highly valued and huge part of the Foundation’s work. One cannot appreciate the full breadth of the Foundation’s community role without understanding that we convey millions of dollars monthly to nonprofits from donors’ funds that are set up expressly to carry out their charitable wishes – little-known facts number six.

The difficulty is that few people are aware of this service role we play; because it is not appropriate to talk about donors’ individual giving. What we can do a better job of, however, is speaking in the aggregate about our donors’ and the Foundation’s impact on society.

The Dayton Foundation recently put together a report on grantmaking from endowed funds only over the last dozen years, by grantmaking purpose area. In this time period (again, from endowed funds only), $3.2 million went to education; $19 million to human services and public/society benefit; $15 million to arts, culture and the humanities; $6 million to environment/animals; $5 million to health; $5 million to religion; as well as charitable dollars that funded other grantmaking purposes.

In addition, another $191 million flowed from Charitable Checking Accounts (CCAs) on top of the $83 million from endowed funds. Just $8 million came from discretionary funds in this time period. These figures begin to give you the scope of the collective impact of these donor funds.

To put the Foundation’s

"...[THE FOUNDATION’S] DISCRETIONARY GRANTS TYPICALLY [ARE] UNDER $1 MILLION DOLLARS A YEAR. THAT’S LESS THAN ONE-THIRTIETH OF ALL THE GRANTMAKING AND CHARITABLE DISTRIBUTIONS FROM THE DAYTON FOUNDATION...."

...into context, the Foundation’s grants statistics in a more direct, human-benefit form, let me give you one example, the broader story of which begins on page one. These are the Cliff’s Notes.

The Robert and Helen Harmony Fund for Needy Children was established at The Dayton Foundation by the Harmonys in 1993 to give disadvantaged Miami Valley young people the opportunity to attend camp. The Harmonys “started our lives with nothing,” earned their living as production workers and when they set up their fund, they said they wanted children to have opportunities they didn’t have growing up.

In an interview in 1994, they said they wanted today’s children to have what they didn’t – a chance to enjoy their childhood. “A kid – he can’t help himself,” Mr. Harmony said. “We just wanted to help someone.”

Although they are not alive today, the Harmonys’ name and charitable intention live on. Their fund today is worth over $1 million. In the last eight years, their fund has made grants of $388,000 and sent nearly 3,000 needy children to camp.

When you see the light in a child’s eyes when that child has left the city for his first camping experience, that is impact. (Fact number seven.) The Harmonys made that happen. This is one of thousands of Dayton Foundation donors’ stories. And it’s part of the story that makes The Dayton Foundation one of the largest grantmakers among the nation’s 700 community foundations. That’s little-known fact number eight.

New, Streamlined Grant Application Process for Nonprofits Unveiled

Applying for a discretionary grant from The Dayton Foundation just got easier for Greater Miami Valley organizations seeking funding, thanks to the Foundation’s new grant application process. This streamlined procedure will make presenting a request for funding more convenient and less time consuming.

"We surveyed representatives from local nonprofits for their thoughts on the Foundation’s discretionary grant application process,” said Pam Sunderland, vice president of Operations. “Their comments, along with our industry’s best practices and suggestions from our Grants Committee, were very insightful and helped us to formulate this new process.”

As the first step in the new process, eligible nonprofits are invited to submit online a Letter of Intent (LOI) briefly describing the organization’s mission and the project for which it is seeking grant support. The Foundation’s volunteer Grants Committee and staff thoroughly review all LOIs. Organizations are then notified in a timely manner whether their project can move on to the second phase, which includes a full grant application.

In addition to adding the LOI to the grant application process, the Foundation has changed from four grant cycles per year to two.

“The Foundation strives to provide the best possible service to local nonprofits and to help them make a positive difference in the region,” Pam Sunderland said. “This system will provide easier access and convenience for area nonprofit organizations in need of funding for their special projects.”

Organizations intending to apply for a grant from the Foundation are encouraged to attend the Foundation’s discretionary grants program orientation. During this free 90-minute session, Foundation staff will explain the new grant application and review processes, as well as the Foundation’s funding guidelines. The next orientation is scheduled for Thursday, November 30, 2006. Pre-registration is required.

More information about the Foundation’s grant application process and funding guidelines, as well as a link to the LOI form, is available at www.daytonfoundation.org/how2app.html. If you have questions about the new process, call Jo Dech at the Foundation at (937) 225-9076, or e-mail her at jdech@daytonfoundation.org.

**Cliffs Notes**

Cliffs Notes are summaries of a book or a series of events. They are designed to provide a quick and easy way to understand the main points of a book or a series of events. They are often used by students to help them understand a book or a series of events. They are also used by teachers to help them teach a book or a series of events.

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Matthew's mother is grateful for the Harmony campership that helped pay for her son's trip to Camp Ko-Man-She, which also educates children on self-management of their disease. Before his camp experience, Matthew's medication schedule and diet plan restricted his mealtimes, food varieties and lifestyle.

“He couldn’t sleep in at sleepovers, because he had to take his medicine first thing in the morning, and couldn’t eat cake with his friends during birthday parties,” his mother said.

Matthew not only participated in traditional camp activities at Camp Ko-Man-She, but he also gained the courage to switch to a new insulin method that gives him more freedom and the ability to eat whatever and whenever he wants.

“My friend at camp helped me go on the new insulin, something I was scared to do,” Matthew said. “And I helped him get the confidence to draw his own insulin and count his carbs. We really bonded.”

A Harmony campership also allowed 11-year-old Amuni to attend the American Lung Association of Ohio’s Camp Superkids for children with asthma.

“Before attending camp, Amuni didn’t do many physical activities, because she was scared of having an asthma attack,” said Brandy, her mother. “Now she’s joined a competitive cheerleading squad, and her self-esteem shot up after seeing kids with asthma at camp just like her.”

For children with language issues, making friends can be difficult, according to Nan Crawford, executive director of Camp Emanuel, which integrates hearing- and language-impaired children with hearing children. “At Camp Emanuel, these children get to socialize and make new friends,” she said. “Thanks to The Dayton Foundation Harmony camperships, they get to do what typical children do with their friends, such as horseback riding and fishing.”

The acceptance and camaraderie at Camp Emanuel changed 14-year-old Nathan, who has a cognitive impairment. “At first, Nathan was clingy and nervous about being away from home,” remarked Susan, his mother. “Now he reaches out and talks to other children who are different from him.”

According to Ms. Crawford, Camp Emanuel encourages children to believe in themselves. Last summer, Nathan sang karaoke and learned to use a bow and arrow. “A couple times I hit the target, and that made me feel proud and happy,” Nathan said. “I’m very excited that I got to go to camp.”

The Dayton Foundation News

Foundation Recognized for Achieving National Accountability Standards

The Council on Foundations recently announced that The Dayton Foundation has been nationally certified for its organizational and financial practices and has successfully met 43 National Standards set forth for U.S. Community Foundations.

Just four other community foundations in Ohio (of 78 statewide) and 110 community foundations (of more than 700 nationally) had been accredited at the time the Foundation received its certification. The Council and leaders of the community foundation field created the National Standards to aid community foundations in adherence to a high standard of legal, ethical and effective operational practices that demonstrate transparency and financial responsibility.

Statewide Nonprofit Association Honors Foundation with Legacy Award

The Dayton Foundation has received an Ohio Nonprofit Excellence Award for its first-in-the-nation Legacy Partnership Program. Sponsored by the Ohio Association of Nonprofit Organizations (OANO), a statewide membership association of nearly 600 nonprofit organizations, the awards program recognizes creativity, execution, achievement and overall excellence of a program or project completed by an Ohio nonprofit in 2005.

The Legacy Partnership Program is designed to assist Greater Miami Valley nonprofits in starting or invigorating an endowment program. Forty-six area nonprofits currently are participating in the program. Since its inception in 2002, the program successfully has identified more than 600 new documented, deferred gifts, with an estimated total value of more than $24 million earmarked for the endowment funds of local charities.

Foundation Wins National and Regional Awards for Outstanding Communications

The Dayton Foundation recently was named a top award winner for excellence in communications by the national Council on Foundations’ 2006 Wilmer Shields Rich Awards Program and the Miami Valley Chapter of the Public Relations Society of America (PRSA).

In the national Wilmer Shields Rich Awards, the Foundation earned a Gold Award for its 2004-2005 Annual Report to the Community, The Art of Giving, a Silver Award for Futures, the Foundation’s publication for financial and estate planning advisors; and a Bronze Award for Good News, the Foundation’s general newsletter.

The Foundation competed in a field of more than 700 community foundations nationwide to win these awards. The local PRSA chapter honored the Foundation with four communications awards for Good News, the Foundation’s latest annual report, Futures and its web site.

Joe Baldasare Named Outstanding Fundraising Executive

Joseph B. Baldasare, MS, CFRE, vice president of Development, was named the 2005 Outstanding Fundraising Executive by the Association of Fundraising Professionals at their annual awards luncheon in November. Prior to joining the Foundation in 2001, Mr. Baldasare served as executive director for United Rehabilitation Services. He also is a tireless volunteer, serving on the boards for The Disability Foundation, Catholic Social Services Planned Giving sub-committee, Rotary Club of Dayton and the United Way’s Health POPs Team.

Since 2000, he has chaired the Italian Club’s Boce Classic Tournament, raising more than $50,000 to support the Ronald McDonald House, the House of Bread and Hannah’s Treasure Chest.

Foundation Staff to Present at National Conference

Three members of The Dayton Foundation’s senior management staff have been invited to speak at the Council on Foundations (COF) national 2006 Fall Conference for Community Foundations in Boston. The conference draws trustees, board and staff members from community foundations nationwide.

President Michael M. Parks, CFRE, and Vice President of Development Joseph B. Baldasare, MS, CFRE, will make a presentation on the Foundation’s groundbreaking Legacy Partnership Program.

Carol Syahi Hicks, vice president of Marketing and Public Relations, will make a presentation on the methods behind creating the Foundation’s award-winning Annual Reports to the Community in a session titled “Annual Reports: Blazing New Trails.” Ms. Hicks also recently presented at the COF’s 2006 communications and development conference in Austin, Texas.
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 20 new endowment funds to support our region and their special charitable causes, now and in the future.

The Allen County Historical Society Fund*** provides unrestricted operating revenue for the Allen County Historical Society, including the Allen County Museum.

Anonymous Fund #15 benefits charitable organizations, as advised by the donor.

The Philip D. Clawson Family Scholarship Fund**** honors the memory of this Harrison Township toolmaker, who valued education and the opportunities it offers individuals. This scholarship provides financial assistance to graduating Tippecanoe High School seniors.

The Benjamin G. Danis, III, Fund benefits charitable organizations, as advised by the donor.


The Dayton Metro Animal Welfare Fund will benefit animal welfare within the Greater Dayton area, by providing medical treatment and other services that currently are not being offered by the state or local government.

The Guerrero and DUBY Scholarship Fund will aid high school graduates, who wish to further their studies in biological sciences at The Ohio State University.

The Hospice of Dayton Foundation Fund, established through a bequest by Betty Jean Edwards, will help assure permanent financial resources for Hospice of Dayton’s programs and services for terminally ill individuals and their families.

The Lima Convalescent Home Foundation Legacy Fund*** benefits the programs and operations of this nonsectarian, assisted living home, by generating unrestricted revenue.

The Naum Family Foundation further the work of charitable organizations, as advised by the donor, Ann M. Shaw-Kremer. She established the fund in memory of her parents, Col. and Mrs. Albert C. Naum, and her two brothers, Maj. Michael C. and Andrew C. Naum.

Marla Vichich The Marla Vichich Fund enhances charitable, educational, civic, religious and community activities of interest to the donor.

The African-American Community Fund will provide scholarships for high school seniors whose fathers or grandfathers were members of an Ohio Masonic Lodge within the 10th Masonic District. Adrian G. Werst, Jr., a longtime member of the Masonic Temple in Wapakoneta, established the fund.

The David S. Stover Dayton Bluehawk Travel Hockey Club Scholarship Fund will award scholarships to help Bluehawk Travel Hockey Club members further their studies at an accredited Ohio college or university.

Unified Health Solutions Legacy Fund empowers individuals to practice healthier lifestyles by generating unrestricted revenue for Unified Health Solutions’ programs and services.

The Hospice of Dayton
The Dr. Charles H. and Lois B. Fortson Family Scholarship Fund awards scholarships to African-American students pursuing a course of study in surgery at the Wright State University School of Medicine.

The Lima Convalescent Home Foundation Legacy Fund
The NCR Wave Cabin Fund** was established by Carillon Historical Park to generate unrestricted revenue to help preserve the NCR Wave Cabin. The cabin housed young Navy WAVES, who manufactured NCR Bombes, top-secret machines built to crack German and Japanese codes during World War II.

Robert and Mary Reid Fund honors the memory of these former owners of The Goody-Goody restaurant in Dayton and celebrates a marriage that spanned 70 years before their deaths in 2005. The fund will aid numerous charitable organizations, including The Dayton Foundation.

The Benjamin G. Danis, III, Fund
The Dr. Charles H. and Lois B. Fortson Family Scholarship Fund
The David S. Stover Dayton Bluehawk Travel Hockey Club Scholarship Fund
Unified Health Solutions Legacy Fund

Charles H. and Lois B. Fortson
Darrell A. and Patricia A. Landis
Darrell A. and Patricia A. Landis

Mary and Robert Reid

Hospice of Dayton
The NCR Wave Cabin

Stephen Wright and Amanda Wright Lane

David S. Stover

The Wright Family Foundation supports the preservation of aviation history related to Orville and Wilbur Wright, by funding research and publication of aviation history, scholarships, educational programming, the restoration and display of artifacts, and landmarks and memorials related to the Wright Brothers’ story. Established by Wilkinson Wright, the Wright Brothers’ grandson, the fund is advised by Stephen Wright and Amanda Wright Lane, great-grandnephew and grandniece.

* The African-American Community Fund
** Carillon Historical Park Fund
*** The Lima Community Foundation Fund
**** Tipp City Area Community Foundations Fund
Rex Warner Leadership Award Fund
Saluting the Leaders of Tomorrow

A stories of corruption, terrorism and crime fill mainstream media, one Dayton Foundation donor is drawing attention to the qualities that make good leaders. He is honoring young men and women who exemplify strong values and character.

In 2002 Andrew K. Ludwick and his family foundation established the Rex Warner Leadership Award Fund to award college scholarships to exceptional Beavercreek High School students.

“The award is about leadership,” said Andy Ludwick, a 1963 graduate of Beavercreek High School, where he was named all-league halfback in football and received an all-state honorable mention his senior year. “The one person who really personals leadership to me is my former coach, Rex Warner.”

Named in honor of this former Beavercreek High School teacher, coach and director of Athletics, the fund has awarded $160,000 to 15 students since 2003. In addition to academic excellence, students nominated for the scholarship must demonstrate leadership skills on and off the athletic field, ethics and honesty, respect for his or her peers and good citizenship.

More than just his football coach, Rex Warner was Mr. Ludwick’s mentor, instilling in him the qualities and values that the scholarship fund now stands for and requires of its nominees.

“He had high expectations for his players, not only for the good of the team, but also for them as individuals,” Andy Ludwick recalled. “He made you want to be the best that you could be.”

Rex Warner respected his players and got their respect in return, he said. To this day, Mr. Warner is devoted to the team and to his players.

Andy Ludwick fondly recalled a 50th birthday card and gift he received from Mr. Warner: “I was in town and went to visit Rex to thank him for the card. Much to my surprise, he handed me a gift – a videotape of my senior year’s football games.”

“I try to keep in contact with all of my players,” Rex Warner said. “I called them on their 50th birthdays, and I’m now in the process of calling them on their 60th birthdays. They are like family to me.”

He feels the same about the recipients of the Warner prize and tries to meet each one of them and their families personally. “I’m very proud of these students,” he said. “I’m also proud of how Andy and all of my players have grown up to become upstanding members of their communities.”

Since he now resides in California, Mr. Ludwick sought the assistance of Ken Nutter, a fellow classmate and teammate, to lead the scholarship selection committee. According to Mr. Ludwick, he wanted to encourage a grass-roots effort in the community, with local leadership for the selection committee. He hopes to kindle community commitment to keep the scholarship fund growing.

“Our standards of behavior and how we treat others have slipped in this country. This scholarship award encourages, celebrates and rewards young people for demonstrating good personal values,” Andy Ludwick said. “Young people need strong leadership to, in turn, become our future leaders.”

Pooled Flexible-Spending Trust
A New Option for Loved Ones with Disabilities

When planning an inheritance for a child with disabilities, many families could be jeopardizing a child’s Supplemental Security Income (SSI) and possibly terminating Medicaid. It is needed for the individual, and the ability to control when funds are used.

Parents, grandparents, legal guardians or the individual themselves can establish an account in either Trust and may designate a personal representative to oversee the account. Establishing an account is a great tool when planning an estate or at any time when an individual with disabilities receives funds, such as with a personal injury settlement, or from a Social Security/SSI back-payment or a lottery winning.

“Establishing an account is a great tool when planning an estate or at any time when an individual with disabilities receives funds,” said Kevin Hayde, executive director of The Disability Foundation. “The Disability Foundation has done it for the recipients of the Warner prize and tries to meet each one of them and their families personally. “I’m very proud of these students,” he said. “I’m also proud of how Andy and all of my players have grown up to become upstanding members of their communities.”

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Meet Kevin Hayde, The Disability Foundation’s New Executive Director
For more than 17 years, Kevin Hayde has advocated for the rights and appropriate support services for individuals with disabilities, most recently as the community relations and development manager for Cincinnati Optimum Residential Environment, Inc. He has served on numerous state and county-level advisory and advocacy committees, including Ohio Private Residential Association, which helped advise the Ohio Department of Mental Retardation and Developmental Disabilities in establishing quality assurance standards for supported living.

He currently serves as the president of Springfield Rotary Club and is a member of the National Council on Planned Giving.
Learn to Earn clients receive free, one-on-one assistance to help overcome barriers to employment.

Internet access for granted, there are people who don’t have the education or the equipment necessary to conduct online job searches.

The Learn to Earn program of Graceworks Lutheran Services (formerly Lutheran Social Services of Mid-America) recognized the need to provide computer training to individuals who are trying to transition from welfare to work. Thanks in part to an $8,700 Dayton Foundation grant in 2004, the Learn to Earn program upgraded its computer lab and expanded the lab’s Internet capabilities to offer more online training.

According to Kimberly Williams, supervisor of the Learn to Earn program, “There are clients who have no computer experience, and they are fearful of the computer. The lab allows them to utilize the computer at their own pace and to have staff available to answer their questions.”

In 2005 the lab logged 336 visits and 622 hours to its facility. Williams sees this as a success, because “now and in the future all of us are going to need some computer skills to be viable in the job market. This service allows these individuals a chance to overcome their obstacles and fears and to gain the experience necessary to find a job.”

Gallery Renovation Offers Artists, Community Room to Grow

Artists create art based on personal experiences, and they most often are influenced by their community and surroundings. Where better to showcase this art, but in the community in which these artists live and produce their work? In 1991 Dayton Visual Arts Center (DVAC) realized this and opened its doors to regional artists as an outlet to professionally showcase their work.

When DVAC began to outgrow its facility, they turned to The Dayton Foundation, along with other organizations, for help. Aided in part by a $25,000 Dayton Foundation grant in 2005, DVAC was able to move to a larger, renovated historical building in downtown Dayton earlier this year.

“Thanks to The Dayton Foundation, the new facility provides a welcoming, safe atmosphere where patrons can feel comfortable coming downtown, viewing contemporary art or visiting art galleries in general,” said Jane Black, executive director of DVAC. “This exposure benefits artists, as well as our community.”

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