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**Toledo
Community
Foundation**

Inspiring and Connecting Thoughtful Giving



Community Leaders Join Foundation Board

During the annual meeting of the Toledo Community Foundation Board of Trustees, three community leaders were named to four year terms on the board.

Beverly J. McBride is Of Counsel for The Andersons, Inc. Until recently she served as vice president, general counsel and secretary for the corporation. Her past service to the community includes president of the Toledo Bar Association, chair of the St. Vincent Mercy Hospital Board of Trustees, vice chairman of the Toledo-Lucas County Port Authority, and trustee of the Anderson Foundation, Wittenberg University and Mercy College.

Geoffrey G. Meyers was the executive vice president and chief financial officer of Manor Care Inc. from 1988 until his May 2006 retirement, and associated with Manor Care and its predecessor companies for 39 years. He is a member of the board of the State Teachers Retirement System of Ohio and chairman of Trust Company of Toledo.

Mark Zyndorf is co-founder of Zyndorf/Serchuk, Inc., a full service commercial/industrial brokerage firm, and Zyndorf/Serchuk Investment Company, Ltd., an investment and development firm. He is on the board of directors of the Regional Growth Partnership, Toledo Cultural Arts Center and Ashley Insurance Co., and serves on the finance committee of the Toledo Board of REALTORS.



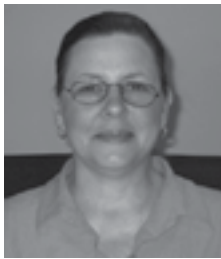
Beverly J. McBride



Geoffrey G. Meyers



Mark Zyndorf



New Staff Member

The Foundation welcomes Bernadette "Bernie" Murnen to the staff. She is an accounting assistant in the finance department.

Bernadette Murnen

608 Madison Ave. Suite 1540
Toledo, OH 43604-1151



FOUNDATION MATTERS

SUMMER 2006

Inspiring and Connecting Thoughtful Giving

This publication shares with you news about the Toledo Community Foundation, as we fulfill our mission of creating philanthropy and making our community a better place to live and raise a family.

The Toledo Community Foundation is a public charitable foundation serving northwest Ohio and southeast Michigan.

For more information about the Foundation, please contact Bridget Brell Holt, Donor Relations Officer, at Bridget@toledocf.org.

Specific inquiries regarding our grant making process may be directed to Kaarina Ornelas, Senior Program Officer, at Kaarina@toledocf.org.

All staff can be reached at 419.241.5049 or visit our website at www.toledocf.org.

Historic Secor Property Creates Lasting Legacy

As a child Virginia Secor Stranahan grew up on the banks of the Maumee River in her family's stately home on East River Road in Perrysburg Township.

The Rockledge Estate extended across River Road and was a working farm with several living quarters for employees, along with stables and a barn.

The Secor home began as a large summer cottage and was remodeled into a permanent home for the Jay K. Secor family, Virginia's parents. Her father was the son of a well-known Toledo family active in the wholesale grocery and banking business.

In 1929, eight years after Jay Secor's death, his wife (Virginia's mother) had the home completed in its present form. Until recently the Rockledge property was occupied by Virginia's granddaughter and her family, the fourth generation to live in the home.

Prior to her death in 1997, Virginia made provisions in her trust to give the property to the Toledo Community Foundation to create a lasting legacy. At the time of her death, the Foundation explored several possible community uses for the property dear to Virginia Stranahan's heart. After six months of research, the Foundation concluded that the best plan for the house was to keep it as a family residence.

Now that the house is vacant, Sulphur Springs Realty is showing the magnificent property for the Foundation. Proceeds from the sale will be placed in the Secor Fund at the Foundation to support many worthwhile endeavors, including support of the 577 Foundation which Virginia Stranahan created for the community.

Secor house for sale

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**Toledo
Community
Foundation**



Message from the President



Only the Best for You

It's always nice to be recognized especially when it means good things for the community.

Recently the Foundation was recognized for complying with the National Standards for U.S. Community Foundations. The designation reaffirms the honesty and integrity that are hallmarks for the Foundation. The process, which involves complying with and documenting all operations of the Foundation, required a year-long effort on the part of the Foundation. This is another example of how we work very hard to communicate our commitment to accountability, excellence and service to you and the entire community.

As the Foundation grows to help the community, more donors are selecting Donor Advised Funds as a way to support their favorite charities and avoid paying higher taxes.

The funds are efficient and accountable. Donors get an immediate tax deduction for their gifts and advise the Foundation on how their contributions might be used to support their favorite charities. In turn, the donor receives quarterly reports on the activity in their fund.

There is no fee for establishing a fund and our administrative fees are very reasonable. We do all the work for you and you get the best recognition possible – helping the community become a better place for today and tomorrow. Nothing can beat that feeling.

Sincerely,



Keith Burwell
President

(continued from cover)

Historic Secor Property Creates Lasting Legacy

Making a charitable gift of real estate can turn property gains into community good. Proceeds from the sale of real estate gifts can be used to establish or add to any type of fund offered by the Foundation to fulfill specific giving intentions. Real estate gifts also provide attractive financial and tax benefits for donors.

To learn more about giving a gift of real estate, please contact Bridget Brell Holt, donor relations officer, at 419.241.5049 or Bridget@toledocf.org.



Aerial view of the Rockledge property in Perrysburg

Give a Gift of Real Estate

For many people, the value of their real estate may exceed any other asset they own. The Toledo Community Foundation accepts real estate as charitable gifts and donors qualify for a tax deduction based on the property's full fair market value.

Real estate gifts are wonderful assets with which to create or add to a fund at the Foundation. For example, donors can create a Donor Advised Fund in their name and stay involved in advising the Foundation on how the fund is used to better the community.

Donor Advised Funds are convenient and flexible. The funds are typically less costly and easier to administer than other forms of philanthropic giving such as family or corporate foundations.

Donors can add to their funds at any time and receive tax benefits for each new gift.

For more information about Donor Advised Funds, please contact Bridget Brell Holt, donor relations officer, at 419.241.5049 or Bridget@toledocf.org.

Grants Build the Community

The Toledo Community Foundation Board of Trustees recently awarded nearly \$400,000 to 16 organizations. The grants help organizations meet their missions and help improve the community.

Assistance Dogs of America - \$12,400

To begin the Prison Puppy Program that pairs puppies with incarcerated individuals to train the dogs in basic obedience and socialization.

African American Legacy Project of Northwest Ohio - \$12,000

To support the oral history project that collects and preserves the experiences of older African Americans in the Toledo area.

James C. Caldwell Community Center - \$12,500

To assist with the start-up costs for a new food pantry in North Toledo.

Catholic Club - \$50,000

To support the start-up costs for an infant day care center.

COSI Toledo - \$90,027

To help with the UPCLOSE (Unleashing Potential by Creating Learning Opportunities through Science Education) after-school program for girls ages 11-15.

Farm Labor Research Project - \$40,000 over two years

To establish the Avanzando en America program providing financial literacy training for recent Latino immigrants to purchase homes or start businesses.

Foundation Center - \$2,500

To provide general operating support for the center that provides information about foundations and corporate grant making, nonprofit management and other related topics.

The Friendly Center - \$12,000

To expand the Gradebusters after-school tutoring program for elementary school children.

Masterworks Chorale - \$11,856 over two years

To expand programming and engage new audiences, especially youth.

Nature's Nursery - \$25,000

To support the salary for a new executive director.

Partners in Education - \$8,500 challenge grant

To assist the Odyssey: Preparing Students for Success in the Workplace collaborative program of high school student internships with Toledo Public Schools and the workplace.

Ohio Grantmakers Forum - \$2,000

To assist with a kindergarten through 12th grade education task force.

Toledo Botanical Garden - Amount to be determined

To assist with capital projects at the garden.

Toledo Opera Association - \$19,993

To support the Young Artist program.

Spiritual Care and Education Center - \$20,000 over two years

To support a volunteer fire chaplain training program for the Toledo Department of Fire and Rescue.

United Way of Greater Toledo - \$50,000

To support the 2005 campaign with a last dollar challenge grant.

Assistance Dogs of America's Prison Puppy Program pairs puppies with incarcerated individuals to train the dogs in basic obedience and socialization.



Grants from the Foundation's Community Funds are considered three times annually and awarded to nonprofit, charitable organizations. The next deadline for receipt of proposals in the Foundation office is September 1, 2006. For application information, visit the Foundation's website at www.toledocf.org and click on Grants, or contact Kaarina Ornelas, senior program officer, at 419.241.5049 or Kaarina@toledocf.org.

Grant Applications Available Online

To make the Foundation's grant application process as easy as possible, organizations can now apply online for Community Funds and the Andersons Fund Supporting Organization grants.

Grant guidelines are available at www.toledocf.org. Click on Grants on the home page and then select from the list of grants, funds or supporting organizations for the appropriate guidelines. You'll be able to develop your application at the same site.

If you have questions or need technical assistance in completing our online applications, please contact the program staff at the Foundation, 419.241.5049, or email Kaarina@toledocf.org.

NICE! Grants Build Spirit

For the second year, the Toledo Community Foundation, in partnership with Leadership Toledo's Youth In Philanthropy Encouraging Excellence (YIPEE) students and *Toledo Area Parent News*, is offering grants to fund community improvement projects.

Last year 10 grants totaling over \$8,000 were given to community groups for such projects as cleaning up parks, planting flowers in a public area, painting a mural, and repairing and building playground equipment.

The one-time grants range from \$100 to \$1,000 for small projects to improve the image of a community and are carried out by citizen volunteers who live and work in the neighborhoods.

To learn more about the program and obtain a grant application, please visit the Foundation's website at www.toledocf.org and click on Grants on the home page and then select Community Improvement Grants, or call Leadership Toledo at 419.241.7371 to request an application by mail.



Toledo School for the Arts Sculpture Garden

Ken Thompson, noted area sculptor and owner of Flatlanders Sculpture Supply and Gallery in Blissfield, Michigan, recently put the finishing touches on The TSA Arch. He donated his creation as the first piece in the Toledo School for the Arts Sculpture Garden. The Toledo Community Foundation awarded a grant to the school to host accomplished sculptors to lecture on historic sculpture. The students worked with the artists to create the garden.

Establishing a Fund

The Foundation offers a variety of ways for you to make donations to reach your philanthropic goals. You can establish your own Foundation fund either during your lifetime or through your estate plan. All grants distributed from your fund – today and in the future – are awarded to charities, as determined by you, in the name of your fund.

Your gift to the Foundation may be made in many forms. Corporations and businesses are limited to gifts of cash, securities, closely-held stock, limited partnership interests and real estate. You and your family have even more options to consider.

Vehicles for Giving

- A **cash gift** is tax deductible as provided under current law.
- Donations of appreciated **publicly-traded securities** are accepted. This type of gift avoids capital gains tax and allows the maximum tax deduction for the full market value of the gift. The Foundation also accepts **closely-held stock** and **limited partnership interests**.
- A **bequest** in your will is a simple way to leave a lasting legacy.
- A **life insurance policy** can be changed to designate the Foundation as the owner and/or beneficiary of a policy.
- **Retirement fund accounts** are often your largest asset. You can give all or part of these assets to the Foundation, both during your lifetime and/or at your death.
- **Real estate** (land, primary residences, vacation homes, farm land, for instance) can be donated to the Foundation and deducted at full fair market value, up to 30 percent of your adjusted gross income. The Foundation sells the real estate and the net proceeds capitalize a new fund or are added to an existing fund. Similarly, **tangible personal property** can be donated to the Foundation, which is also then sold.
- A **charitable remainder trust** allows you (or other named beneficiaries) to receive lifetime income. Upon your death, the remaining principal creates a fund at the Foundation. You receive an immediate charitable deduction for a portion of the gift and avoid capital gains tax.
- A **charitable lead trust** creates income for the Foundation for a specified period, after which the remaining principal is distributed to named beneficiaries. Gift and estate taxes are reduced with this type of gift.
- **Transfer of a private foundation** affords you many advantages, including lower overhead, staff to assist with your charitable goals, and a higher tax deduction for any future gift, to name only a few.

Getting Started

To inquire about establishing a fund at the Foundation, please contact Bridget Brell Holt, donor relations officer, at 419.241.5049 or Bridget@toledocf.org.



Kitty Todd Nature Preserve Protects Rare Ohio Species

Due to the pressure of urban sprawl in Northwest Ohio, natural habitats for plants and animals are being squeezed out of existence. Lush forests offering safe havens for birds, butterflies and flowers are vanishing.

But a \$40,000 grant from the Toledo Community Foundation to The Nature Conservancy's Kitty Todd Nature Preserve near Swanton is helping to reverse the trend.

The 723-acre preserve in the Oak Openings Region that is owned by The Nature Conservancy has some of the finest wet prairie and black oak communities in Ohio with 177 rare species – more than any area of a similar size in Ohio.

“With the Foundation’s support, we’ve been conducting much needed restoration work and modifying the land for the return of the Karner blue butterfly which is on the federal endangered species list,” says Rich Shank, State Director for The Nature Conservancy.

In Ohio, the butterfly only exists in the Oak Openings Region and by 1988 only three butterflies remained in the area. The Nature Conservancy working in conjunction with The Toledo Zoo has begun to reintroduce the Karner blue as a permanent part of Ohio’s natural heritage.

“We are working very hard to return the land to the way it was 200 years ago when the region supported stands of oaks and treeless prairies,” he says. “The Foundation has been a great friend in helping us make a dramatic difference in Northwest Ohio in preserving this very unique environment for generations to come,” he concludes.

The preservation of the environment is very important to the Foundation and to the future of the entire community. For information about making donations to environmental projects, please contact Bridget Brell Holt, donor relations officer, at 419.241.5049 or Bridget@toledocf.org.



FOUNDATION FUNDAMENTALS

Third Thursday Luncheons

The Foundation continues the **Third Thursday Luncheon Seminar** education series at The Toledo Club through this summer and fall.

The seminars begin at noon and include:

July 20 – Area Office on Aging of Northwest Ohio

September 21 – Paul’s Peers (Alzheimer’s/Dementia)

October 19 – Meet the new Executive Director of the Toledo Zoo

November 16 – Community Resource Health Fair

Please contact Bridget Brell Holt, donor relations officer, at 419.241.5049 or Bridget@toledocf.org to make a reservation or for more information.

Special Event

Make sure to save the evening of **October 24** for a special Foundation event featuring **Porter Halyburton**, former naval flight officer and Vietnam War Prisoner of War.

He will discuss the importance of our values, ethics and commitment in leading a meaningful life.

The event will be at the Toledo Country Club and more information will be available soon.

Funders’ Network

Through the **Northwest Ohio Funders’ Network**, individuals involved in foundations, donor advised funds and corporate giving programs get together to share ideas in an informal setting. The Toledo Community Foundation provides administrative support for the gatherings.

The Network discusses best practices, grant making opportunities and specific issues of interest affecting Northwest Ohio.

Recent topics of discussion have been the UT/MUO merger plans, environmental issues affecting Northwest Ohio, and economic development and redevelopment. In these closed door sessions, individuals active in organized philanthropy can meet in an open forum where there is no solicitation of funds. Experienced and novice funders are welcome.

To become involved in the Network, please contact Fredi Heywood, administrator of the Center for Private & Family Foundations at the Toledo Community Foundation, at 419.243.1706 or Fredi@toledocf.org.

Book the President

Keith Burwell, president of the Foundation, talks to service clubs, church groups and other organizations about ways to partner to positively impact the community. Most recently, Keith spoke at an international conference on community philanthropy.

No Foundation funds are solicited and Keith speaks free of charge.

If you would like to book Keith, please call Linda Henderson, administrative assistant at the Foundation, at 419.241.5049.

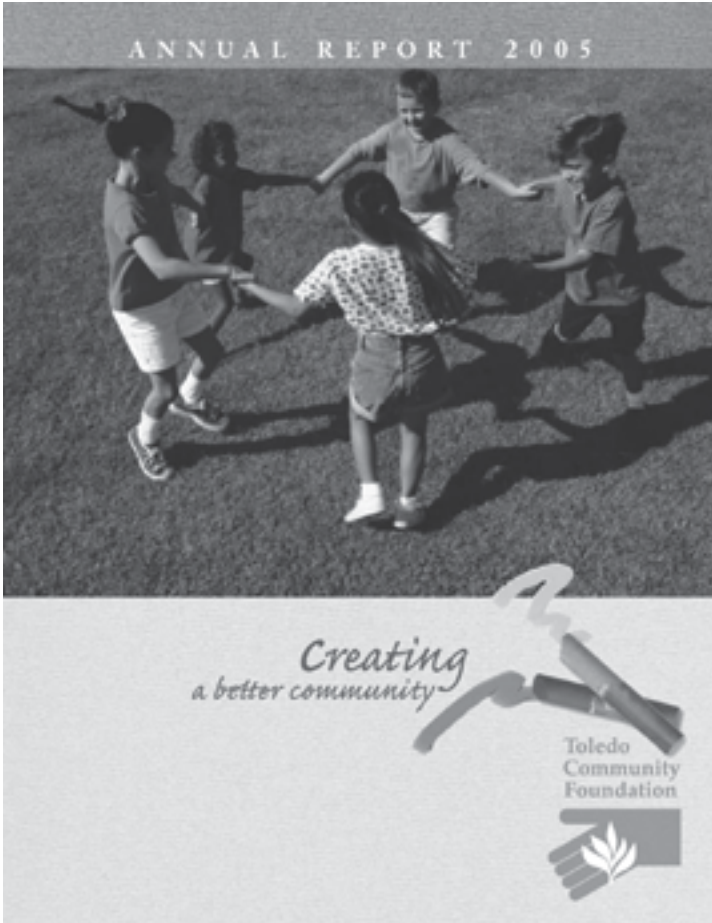
Workshops Guide Nonprofit Agencies

The Center for Nonprofit Resources offers workshops and seminars covering all areas of nonprofit management and capacity building. Two summer workshops have recently been announced for nonprofit organizations.

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On **July 26, *Starting A Non-profit & Board Governance Basics*** workshop will include presentations on the legal requirements for incorporation and board responsibilities. The workshop is designed for people interested in starting a nonprofit, new to nonprofits and those needing a review of the role of the board of directors.

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On **August 22, *How to Develop a Fundraising Plan for Grass-roots Nonprofits*** workshop will include a general overview of the most important building blocks needed for fundraising. The fee for each workshop is \$20 and the sessions will be at the Main branch of the Toledo–Lucas County Public Library.

*For more information or to register, please contact **Joey Apgar**, director of the Center for Nonprofit Resources, at 419.241.9513 or Joey@toledocf.org.*



Foundation Earns National Recognition

The Toledo Community Foundation was recognized for complying with the organizational and financial practices of the National Standards for U.S. Community Foundations by the Council on Foundations (COF), the national association of all foundations.

To date, the Foundation is the only foundation in the area to have received this recognition.

The National Standards were created by the COF in 2000 to aid community foundations in establishing legal, ethical and effective operational practices that show transparency and financial responsibility.

The standards were developed to distinguish community foundations from other philanthropic vehicles and provide a means for self-regulation in a positive manner with the Internal Revenue Service.



To earn the recognition, the Foundation underwent a year-long review of its operating

practices by a team of experienced community foundation professionals from the COF. The National Standards seal, pictured here, was developed for use by community foundations to signify that they have been confirmed in compliance with National Standards.

This recognition is just one more way the Foundation can publicly communicate its commitment to accountability, excellence and service to our community.

Report to the Community

The Foundation's 2005 Annual Report was mailed in early June. Be sure to read this report to learn how the Foundation is building charitable endowments, providing grants to nonprofit organizations, and serving as a catalyst to create a better community.

If you did not receive a copy and would like one, please email us at toledocf@toledocf.org or call Linda Henderson, administrative assistant, at 419.241.5049 to request a copy.

"Our community shares a strong tradition of people helping people... With your help, we will continue to build a solid foundation and create a better community for all of us – one donor, one grant at a time."

Susan E. Morgan
Chair, Board of Trustees
2005 Annual Report

Finding the Perfect Gift

Life's most important moments deserve very special gifts to honor the occasion. But finding that gift can be difficult.

To help ease the burden, consider making a donation to the Foundation to honor weddings, anniversaries, birthdays and graduations. Donations can be made to the Foundation in the name of a couple, a family or a person.

This perfect gift has a lasting impression. To learn more about making donations, please contact Bridget Brell Holt, donor relations officer, at 419.241.5049 or Bridget@toledocf.org.