

WINTER 2016



# Foundation Matters

## *Inspiring and Connecting Thoughtful Giving*

Foundation Matters shares the latest news about Toledo Community Foundation, and how we achieve our mission of creating philanthropy and making our community a better place for everyone to live and raise a family.

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

For more information about the Foundation, please contact Ken Frisch or Bridget Brell Holt, philanthropic services officers, at [ken@toledocf.org](mailto:ken@toledocf.org) or [Bridget@toledocf.org](mailto:Bridget@toledocf.org).

If you have a special inquiry about our grantmaking process, please contact Anneliese Grytafey, senior program officer, at [Anneliese@toledocf.org](mailto:Anneliese@toledocf.org).

You can reach any of our staff at 419.241.5049 or visit our website at [www.toledocf.org](http://www.toledocf.org).

**Toledo  
Community  
Foundation**



Toledo Mayor Paula Hicks-Hudson speaks about the impact a shared kitchen will have on our community. Representing the parties involved in this joint project are (L) Dan Rogers (CSMM), Paul Smith (CSMM), Keith Burwell (TCF), and Pat Howard (FLCC).

## Collaboration Creates Efficiencies

**A** new kitchen means greater efficiency. More storage. Quality appliances. For Cherry Street Mission Ministries (CSMM) and Feed Lucas County Children (FLCC), a new state-of-the-art shared kitchen will allow the two organizations to increase their capacity to prepare and serve meals to hungry children and adults threefold. But the ultimate goal is more than providing 1.5 million meals annually.

"We want to end hunger by employment," said Dan Rogers, president and chief executive officer of Cherry Street Mission Ministries. "We plan to leverage each meal we provide by reaching out to more people with services. We will have an enrollment officer at each meal site that FLCC serves."

In addition, Cherry Street's Life Revitalization Center (the former Macomber Vocational High School) will offer an accredited culinary vocational program at the site. Owens Community College will be providing the curriculum, and the training will be open to the public.

Toledo Community Foundation provided a Catalyst Grant to cover legal fees incurred for determining the shared operating and usage expenses between the two organizations. Three other funds of the Toledo Community Foundation provided grants to support this joint project:

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**The shared kitchen is made possible through a number of funding sources, an ideal example of how collaboration of funds allows powerful leveraging of services.**

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The Oswald Supporting Organization provided a grant for kitchen equipment; ProMedica Advocacy Fund; and the Makulinski Family  
*Continued on page 2*



## Message from the President

Dear Friends,

There is strength in numbers. We have witnessed over and over the power of collaboration in sustaining and growing the work of nonprofit organizations in our community. Sometimes it is two organizations with similar missions joining forces to better serve others. We share one of those stories in this issue—Cherry Street Mission Ministries and Feed Lucas County Children are building and sharing a new state-of-the-art kitchen that will not only improve efficiencies, but also help them to prepare and share 1.5 million meals annually with the hungry in our city.

We saw collaboration among nonprofits this past December as more and more organizations embraced the GivingTuesday online donation movement. They readily shared one day devoted to generating financial support and awareness. Hundreds of nonprofit organizations, with different missions and programs, benefited by encouraging everyone to pause for 24 hours and consider what they could do to help. Their mutual dedication to GivingTuesday resulted in more than \$729,000 in donations in one day.

And each day, we are grateful for businesses, individuals and families who, while they may never meet, are in essence collaborating by choosing to create or contribute to a fund through Toledo Community Foundation. There is strength in numbers. A strength that will help make our community better for generations to come.



Excellence. Accountability. Impact.™

Sincerely,

Keith Burwell, President

## Collaboration Creates Efficiencies *continued*

Foundation. They also received a \$1 million grant from the state to assist with the \$2.5 million project.

“It makes sense to collaborate and make more efficient use of facilities, particularly for organizations such as FLCC and CSMM which are both preparing meals for large numbers of people,” said Patrick Howard, who became chief executive officer of FLCC in 2015.

Feed Lucas County Children was one of a group of like-minded agencies that also received funding from TCF through a \$52,000 Strategic Alliance Partnership grant in 2015.

“We are eternally grateful for the funding we received from Toledo Community Foundation,” said Pat. “The Strategic Alliance Partnership grant helped us to coordinate and implement a new summer food service strategy with the Children’s Hunger Alliance, YMCA, Toledo Public Schools and area food pantries.”

“The funding helped us to create a more efficient operation and allowed us to increase our capacity to serve more children in the afterschool sites,” said Pat.

In addition to establishing a solid community collaborative, the Strategic Alliance Partnership also helped FLCC and its partners access state and

federal funding to expand food service and delivery systems and enhance food quality to ensure all children have access to nutritious meals.

Feed Lucas County Children provides hot lunches and dinners at 90 sites throughout the summer months for children 18 years or younger in areas where the majority of families are living at or below poverty level. FLCC also provides meals at 21 afterschool programs throughout the city during the school year. The programs must provide a structured educational component.

“We plan to leverage the meals we provide with social workers, case managers, and our enrollment officers,” said Dan. “We want to not just end hunger, but to also end poverty.”

*Collaboration is the key to receiving strategic alliance partnership grants from TCF. Efficiencies are realized; progress is made; and impact is increased.*

*Be sure to read about another SAP grant that assisted in the merger of Beach House Family Shelter and FOCUS, coming in our 2015 Annual Report. To learn more about SAP, visit [www.toledocf.org/main/grants-module/](http://www.toledocf.org/main/grants-module/)*

# The Cocoon

## A model of sustainability and community impact

A successful nonprofit serving victims of domestic violence does much more than provide a safe place for them to stay. The Cocoon in Wood County is a prime example of how, in just 10 years, an organization moved from a start up to a sustainable, comprehensive nonprofit that broke down barriers, focused on inclusion and, most importantly, brought more domestic violence survivors seeking help to its doors.

"Toledo Community Foundation provided our first funding that enabled the Cocoon Shelter to hire me as the Executive Director, said Michelle Clossick, Executive Director, of the Cocoon, which opened in 2005.

"Toledo Community Foundation was one of only two funders willing to support the organization before we opened our doors and this made it possible for us to open."

"Since then, at each point of expansion, growth or critical need, TCF has been there supporting us and challenging us to approach our challenges and opportunities with sustainability and community impact in mind," she added. "I am not sure we could have managed many of these key junctures without the support of TCF"

The Cocoon, which began with a staff of one, now has 20 employees. When The Cocoon Shelter opened, four agencies were doing community advocacy; in 2012, Cocoon Shelter became the only agency in Wood County providing shelter and doing community advocacy.

"We have prioritized inclusion (serving all survivors in need), accessibility, safety, and increasing our capacity to meet the needs of survivors on their terms," said Michelle. "This has resulted in more survivors in our community seeking help and returning for help when needed."

"The service need increased five-fold when we added comprehensive advocacy services, like support with protection orders, pre-trial hearings, 24 hour crisis intervention and support, medical advocacy and economic empowerment work," explained Michelle.

In addition to TCF's initial start-up grant and another in 2012 to support the organization's expansion, the Foundation also awarded The Cocoon \$20,361 in 2015 to support programming expansion for its new, larger domestic violence shelter and administrative office facility.

"Grants from the TCF Community Funds and ProMedica Advocacy Fund of the Toledo Community Foundation in 2015 helped us to sustain our comprehensive advocacy services during a time of such growth and change," said Michelle. "This funding was critical to our success."


"The Stranahan Supporting Organization helped us with capital improvement projects that enabled us to build offices for our program managers and create functional work space for our advocacy staff in

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**"...At each point of expansion, growth or critical need, Toledo Community Foundation has been there supporting us and challenging us to approach our challenges and opportunities with sustainability and community impact in mind."**

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the new location," she said. "This was critical to our ability to sustain and build our programs and services despite not having our renovation complete."

In 2015, the Cocoon Shelter changed its name to The Cocoon to reflect its expanded mission to be more inclusive. The Sexual Violence Survivor Advocacy program (formerly the SAAFE Center at Behavioral Connections) was relocated to The Cocoon last year. All domestic and sexual violence programs in Wood County are now housed at its new location, while emergency shelter continues at the original location. 

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## Twenty-four Hours of Giving

Nonprofits across the globe and here in northwest Ohio have embraced "GivingTuesday" as more and more donors have opened their wallets on this seasonal day of online giving. The 2015 GivingTuesday campaign set new records both locally and throughout the nation.

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## #GIVINGTUESDAYNWO

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According to the Case Foundation, total online donations processed across the nation on GivingTuesday **more than doubled from 2014** — over \$116 million was donated to nonprofits by 698,961 online donors.

In northwest Ohio, through information collected by The Center for Nonprofit Resources and TCF, 187 responding organizations noted that they raised \$729,534, a 115% increase over the dollar amount reported in 2014. Participating organizations also had the opportunity to apply for a matching grant of up to \$1,000 from TCF.

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## Upcoming Professional Development

The Center for Nonprofit Resources is offering the following professional development workshops. You may register for these programs at [c4npr.org](http://c4npr.org).



### **Multicultural Competence: Beyond Race, Gender & Sexual Orientation** (World View and Cultural Norms — Do We Really Understand One Another?)

March 10, 2016 • 9am to 4pm

Main Library, 325 N. Michigan Street

◀ **Presenter: Suzanne LeLaurin** of the International Institute of St. Louis.

This program is designed to benefit all nonprofit staff from those in administrative roles to those who work directly with clients, and is brought to you in partnership with Welcome Toledo-Lucas County.



### **What Every Fundraiser Can Do to Stop Falling Donor Retention Rates**

April 21, 2016 • 9am to 12pm

Main Library, 325 N. Michigan Street

◀ **Presenters: Jay Love** and **Steven Stattuck** of Bloomerang.

This workshop is presented by AFP of Northwest Ohio and is part of our Fundraising Series sponsored by ProMedica.




### **Right-Things, Right-Now Marketing & Planning — Your Path to Job Satisfaction and Unequalled Results**

April 27, 2016 • 9am to 4pm

Main Library, 325 N. Michigan Street

◀ **Presenter: Nancy Schwartz** of GettingAttention.org.

This workshop is part of our Fundraising Series sponsored by ProMedica.


For more information on these and other workshops being offered through The Center, visit [c4npr.org](http://c4npr.org). 



Michelle Klinger  
Director  
The Center for Nonprofit Resources

## Twenty-four Hours of Giving Continued from page 3

"This year the numbers show that there was more awareness of this giving day, and more people contributed on December 1st as a result of the local nonprofits promoting GivingTuesday to their friends and donors," said Patrick Johnston, TCF program officer. "We consider this a huge success, with the reporting organizations raising nearly double what was reported last year."

Special thanks go to those who provided matching funds: The Andersons, Makulinski Family Foundation, Bob and Sue Savage, SkyLife Technologies, and Don Harbaugh, and The Blade for continuing to partner with TCF on GivingTuesday and promoting the program. We also thank WGTE for sponsoring a workshop, Tips and Tricks, on how nonprofits can collect donations. 

# Why Wait? Create Your Legacy Now


**W**hen a young woman approached Gould Ruma Financial Advisors for assistance in creating a legacy fund last year, she didn't know that her legacy would begin sooner rather than later. Her unexpected passing at the age of 69 followed just ten months after she completed the documents to create a future fund with Toledo Community Foundation.

"This is an example of how important it is to create a fund in a timely manner," said Peter Ruma, Jr., financial advisor. "Fortunately, we had discussed her options and she created a scholarship fund in memory of her mother and a designated fund to support several organizations through Toledo Community Foundation."

"She felt very comfortable with her decision and knowing that upon her passing, funds would be used exactly as she wished."

For financial planners like Pete, much of the advisory work revolves around educating clients about what they can fund, how those funds will benefit others now or later, and how much control they have over their gift decision.

"Many people mistakenly believe that they are locked in once they sign an agreement with Toledo Community Foundation," he said. "However, clients have complete control over funding the agreement."

While a primary benefit of creating a legacy fund are the tax benefits it offers, for many people, creating a legacy is about something more sublime: the desire to make the world a better place. 

## Make Your Gift a Lasting One

Toledo Community Foundation can help you create a legacy that supports your interests and giving goals. Whether you would like to support an area nonprofit organization, create a scholarship, or memorialize someone close to you, we will work with you and your financial or legal advisor to define your charitable goals, identify areas of philanthropic interest, and help you determine the most effective vehicle for your charitable giving.

### Here are some of the most popular vehicles for giving:

- 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 one's 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, etc.) can be donated to the Foundation and deducted at full fair market value, up to 30 percent of one's 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** offers 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.


**Call us today to create a lasting gift.** Contact Ken Frisch, Senior Philanthropic Services Officer, or Bridget Brell Holt, Philanthropic Services Officer, at 419.241.5049.

Securities offered through LPL Financial, Member FINRA/SIPC. Financial Planning offered through Gould Ruma Financial Advisors, a registered investment advisor and separate entity from LPL Financial.



Fredi Heywood and Carol Saner

## Farewell Friends

**T**wo long-time Toledo Community Foundation employees retired in 2015 after a combined 28 years of service. We wish Fredi Heywood and Carol Saner all the best in the coming years and thank them for their exemplary dedication and service to the Foundation and the northwest Ohio community. 

# Foundation Dollars at Work

## Community Funds

With the financial support of Toledo Community Foundation, Good Grief of Northwest Ohio will expand its services to help more children, teens and young adults who have suffered the loss of someone significant in their lives. Good Grief is one of 12 organizations who received grants totaling \$310,398 from the Foundation's Community Funds.

Good Grief plans to use its Community Funds grant of \$21,568 to add peer support groups starting with those that have the longest waiting lists. Good Grief's peer support groups are free and led by trained facilitators who help children, teens and young adults to express the multitude of emotions they are feeling through music, play, art, journal writing and other activities.



Good Grief

Other grants were awarded to:

- **Adrian Rea Literacy Center** — \$10,000  
Enhance the English as a Second Language program for adult learners with low literacy skills in their native language.
- **Bittersweet, Inc.** — \$30,000  
Support the Bittersweet Gardens program.
- **Diabetes Youth Services** — \$10,000  
Support Middle Shots Camp, a new residential camping experience for middle school aged children with diabetes.
- **Feed Lucas County Children, Inc.** — \$16,000  
Expand summer and out of school time meal services for children in Lucas County.
- **Foundation Center** — \$3,500  
Support programming in northwest Ohio.
- **ProMedica** — \$57,450  
Launch the Financial Opportunity Center at the Ebeid Institute for Population Health in partnership with Toledo Local Initiatives Support Corporation.
- **Toledo Area Chamber Foundation** — \$100,000  
Support the Rocket Ventures Launch Mentoring Program to provide fledgling entrepreneurs with mentorship, training and connection to resources.
- **Toledo Opera Association** — \$5,000  
Support "An Opera is a Story" program.

- **United Way of Greater Toledo** — \$10,000  
Support the Dolly Parton Imagination Library program.

- **The University of Toledo** — \$15,000  
Support Brothers on the Rise, an academic and life skills support program serving at-risk minority male students attending college.

- **US Together** — \$31,880  
Support the Economic Integration Program, which provides financial literacy education for recently resettled refugee families.

## Fund for Islamic Understanding

Toledo Community Foundation also awarded \$5,000 to **United North** from The Fund for Islamic Understanding, Education and Dialog to support the Toledo International Film Festival.

## Stranahan Supporting Organization

A \$25,000 grant from the Stranahan Supporting Organization will help support safe cycling skills for children with disabilities through the Programs to Educate All Cyclists (PEAC). PEAC offers a seven-week Summer Bike Program that provides quality cycling instruction, and creates an environment where all students can learn, are appreciated, respected and have fun.

PEAC was one of 11 nonprofit organizations that received grants totaling \$250,300 from the Stranahan Supporting Organization.



Programs to Educate All Cyclists

Other awardees were:

- **Advocating Opportunity, Inc.** – \$25,000  
Support legal advocacy and support services for victims of human trafficking.
- **Aspire** – \$25,000  
Support the general operations of Aspire, a data-driven, collective impact strategy that harnesses the power of our community to advance the success of Lucas County children from cradle to career.
- **Black Swamp Conservancy** – \$17,800  
Support a geothermal heating system at its new headquarters.
- **Children's Theatre Workshop** – \$5,000  
Support the Teen Company Program.
- **The Cocoon** – \$25,000  
Support capital improvements at the new shelter facility.
- **Dental Center of Northwest Ohio** – \$30,000  
Support dental care management and early oral health services.
- **Feed Lucas County Children** – \$25,000  
Support afterschool and summer meal services for children.
- **Mountain Mentors** – \$17,500  
Support youth mentoring services.
- **Polly Fox Academy** – \$25,000  
Support student services programming.
- **Zepf Community Mental Health Center** – \$30,000  
Support the Zepf Runaway Youth Shelter program.

## Toledo Walleye Focuses on Fitness and Wellness of Children

Toledo Community Foundation granted \$20,705 in awards to five area nonprofit organizations from the Toledo Walleye Hockey Club's Wishing Well Fund.

These grants focus on nonprofit organizations that provide programming which promotes the overall fitness and wellness of children during cold weather months.

The following organizations received the grants:

- **Adaptive Sports Program of Ohio** – \$8,148  
To support a sled hockey team serving youth with physical disabilities.
- **Boys & Girls Club of Lenawee** – \$2,500  
To support the Triple Play program that focuses on healthy eating, physical activity and recreation.
- **International Boxing Club, Inc.** – \$3,000  
To purchase equipment for a program serving Toledo central city youth.
- **Lucas Resident Services Corporation** – \$5,000  
To purchase sporting equipment for a new wellness program serving youth at three locations.
- **The University Church** – \$2,057  
To purchase equipment for an afterschool program. 

## Upcoming Grant Application Deadlines

**April 15, 2016** • Andersons Fund Supporting Organization

**September 15, 2016** • Community Funds

For more information about various grant opportunities and to view guidelines, go to [www.toledocf.org](http://www.toledocf.org).


### Call Us Before Submitting

The Toledo Community Foundation staff is happy to meet with you and is available to answer any questions you may have regarding the grant application process. We encourage you to call us before submitting a proposal. You may reach us at 419.241.5049.

## Anderson Foundation Has an Eye on Education

Toledo Community Foundation is proud to assist the Anderson Foundation in awarding grants totaling \$75,403 to five area nonprofit organizations.

- **Library Legacy Foundation of the Toledo-Lucas County Public Library** – \$15,403  
Support the Ready to Read "Ready, Set...Kindergarten!" expansion project.
- **Mom's House of Toledo, Inc.** – \$20,000  
Support high quality early childhood education.
- **Read for Literacy, Inc.** – \$5,000  
Support the development of early literacy skills for young children in East Toledo.
- **Toledo Day Nursery** – \$15,000  
Support two new preschool classrooms in the Old South End of Toledo.
- **The University of Toledo Foundation** – \$20,000  
Support the Reach Out and Read program.


This was a new funding opportunity for area nonprofit organizations that provide services that are aligned with the goals of Aspire. Learn more about Aspire at [www.aspiretoledo.org](http://www.aspiretoledo.org). 



## Keep Clicking

Follow TCF on Facebook/Visit Us on the Web

For the latest news, initiatives and important news from our northwest Ohio community, follow Toledo Community Foundation on Facebook. We welcome your comments and questions on Facebook.

Visit us on the web at [www.toledocf.org](http://www.toledocf.org) where you can learn more about establishing funds, applying for grants, making online donations, and much more. 



# Toledo Community Foundation



*Inspiring and  
Connecting  
Thoughtful Giving*

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## IRA Charitable Rollover Now Permanent


**O**n December 18, 2015, Congress made the IRA Charitable Rollover a permanent law.

If you are 70.5 years of age or older, please consider making a direct distribution from your IRA to Toledo Community Foundation. The Foundation offers a number of fund options for you to choose from to create a fund, including a community fund, designated fund, field of interest fund, or scholarship fund, if you haven't established yours yet.

Doing so will:

- Provide immediate support for the work of the Foundation
- Help satisfy the required minimum distribution
- Eliminate income tax on the distribution

Please note there is no need to wait until the end of the year to make an IRA Charitable Rollover. Completing an IRA Charitable Rollover avoids complicating other tax-planning activities that must wait until year-end.

Currently, while individuals may roll over up to \$100,000 from an individual retirement account directly to a qualifying charity without recognizing the assets transferred as income, the law prohibits that gift being made to a Donor Advised Fund. Efforts are being made to have this law revised to include Donor Advised Funds. Toledo Community Foundation will keep you apprised of any changes in this regard. 

### A Smart Way to Use Your IRA

If you are 70.5 years of age or older...

- ✓ Plan now to make a tax-free gift from your IRA in 2016
- ✓ Your gift counts toward your required minimum distribution
- ✓ Make an impact in your community

## New Look for National Standards

**T**he National Standards for U.S. Community Foundations has created a new accreditation seal that represents excellence, accountability, and the impact of community foundations that uphold these standards.

The National Standards for U.S. Community Foundations accreditation program represents a community foundation's commitment to go above and beyond federal and state law requirements to demonstrate accountability and excellence to communities, policymakers, and the public. 



Excellence. Accountability. Impact.™