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## **COMMUNITY FOUNDATION TEAM**

### **GOVERNING BOARD**

Karen Winner Sed (President)

William Strimbu (Vice President)

Ken Turcic (Secretary)

Ronald Anderson (Treasurer)

James A. O'Brien (Past President)

Rita Clemente

Joe Gabriel

Stephen Gurgovits, Sr.

Lew Kachulis

Simonae Lyles

Jeff Mathews

Ernie May

**Robert Miller** 

Paul O'Brien

Al Puntureri

**Robert Sherbondy** 

**Richard Stevenson** 

James Weller, Sr.

### **COMMUNITY FOUNDATION STAFF**



Top Row (L to R): Debbie Barnard (Finance Assistant) | Denny Lieb (Director of Finance) |

Kyle English (Executive Director) | Amy Atkinson (Director of Planned Giving) | Nancy Jastatt-Juergens (Program Manager)

Bottom Row (L to R): Marilyn Magnotto (Admin. Assistant) | Linda Welch (Scholarship Administrator) |
Amber Currie (Controller) | Judy Radkowski (Director of Community and Donor Engagement)

### Dear Friends,

It's exhilarating to see how the Community Foundation of Western PA & Eastern OH can help in bringing out the best in people. Our organization takes great pride in providing members of our community the opportunity to choose their impact and, in so doing, make a difference in the lives of others. That's more unique than most people realize. Typically, a financial gift, once donated, leaves little choice on the donor's part as to how it is spent. At the Community Foundation, we take giving you the chance to "Choose Your Impact" very seriously. We want donors to know that when they set up a fund, they will choose the type of fund and what type of support it will provide. We not only encourage the donor to be directly involved, we embrace it. Beyond the activities of a traditional community foundation, our Foundation is relentless when it comes to connecting our donors with causes that will have far-reaching impact within the communities that we serve.

One such example was when the township of Kinsman (OH) was hit by a massive storm that dropped almost seven inches of rain in under two hours. The consequences of the storm reverberated throughout the community and even left some people without the ability to return to their homes. It was pure devastation. However, in this time of loss, it was remarkable to see the community's response.

After everyone was accounted for, a fund was established within our affiliate, the Northern Trumbull County Community Foundation (NTCCF), to collect donations. Residents of Kinsman and the surrounding area stepped up along with Rotary Clubs, businesses, churches, and Legions. Donors holding funds with the Community Foundation who lived outside of Kinsman and even in other states also provided substantial support. Within one short week, over \$50,000 had been raised, with the NTCCF board committing to meet as often as was necessary in order to ensure that the money was put to use where it would have the most impact. Dumpsters for the cleanup were purchased. Baskets of food were made available to those that needed them. Household items that were damaged or destroyed were repaired or replaced. Security was provided to students that had to walk through the woods to a temporary bus stop because their homes were inaccessible due to road closures. Neighbor helping neighbor, stranger helping stranger – all represented donors choosing impact. That's the true power of the Community Foundation.

This example, as powerful as it is, serves as just one of literally thousands of inspirational stories of people working through the Community Foundation for the common good each year. It truly is our organization's honor to help so many generous people throughout our region to choose their impact, and we would love the chance to help you choose yours!



Karen Winner Sed
President



**Kyle P.D. English**Executive Director



"Yesterday is gone. Tomorrow has not yet come. We have only today. Let us begin."

# COMMUNITY FOUNDATION OF WESTERN PA & EASTERN OH

Because nobody knows a community better than the people that live and work in it on a daily basis, our Foundation created its affiliate system.

These affiliates work to help individuals set up Donor-Advised, Field of Interest, Donor-Designated, and Scholarship funds that will support the community now and into the future.





## AFFILIATE BOARD MEMBERS



Ernie May (President)
Richard Stevenson (Vice President)

Ryan Bonner Todd Burns Michael Clancey Dorene Powell Doug Thomas



Joe Gabriel (President)
Simonae Lyles (Vice President)

Jonathan Bruce

Michael Bshero

Amy Fehrs

Carol Kennaday

Marvin Lebby

Geoff Measel

**Brenda Moses** 

Thomas Shumaker

Randy Silverman

R. Kay Thompson

**Amy Turk** 

Lester Hauschild (Director Emeritus)

David Henderson (Director Emeritus)

Thomas Lamoree II (Director Emeritus)

Thomas Mansell (Director Emeritus)

Dan Vogler (Director Emeritus)



Ken Turcic (President)
Robert Sherbondy (Vice President)

Rita Clemente

John Hauser

Roberta Leonard

Cris Loutzenhiser

Mario Marini

Kenneth McEwen

**David Shaffer** 

Archie Wallace (Director Emeritus)



## AFFILIATE BOARD MEMBERS



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Robert Miller (Vice President)

Elthie Logan

Leslie Miller

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Paul O'Brien (President)

James Weller, Sr. (Vice President)

Fred Alberini

Matt Blair

William Casey

John Rossi

Deryck Toles

John Weller

James (Jimmy) Weller III

## AS A DONOR, YOU CAN CHOOSE YOUR IMPACT.

The Community Foundation's mission is to help donors reach their philanthropic goals while expanding charitable giving throughout our region. Following are the six areas of focused giving by donors who are choosing their impact through the Community Foundation.













## REGIONAL IMPACT ASSESSMENT

PROVIDING THE DATA THAT DONORS NEED TO INCREASE GRANT IMPACT



Our community is blessed with some of the most generous people in our great country. The Community Foundation's objective is to equip our donors so that they may have their desired impact throughout our region. Our goal as a Foundation is not just to help connect our donors with specific causes, but also to empower them to understand and tackle important social issues to positively impact future generations.

With that in mind, the Community
Foundation partnered with students
from Grove City College to complete our
first Impact Assessment. Local leaders
and hard-working individuals from
charitable organizations throughout our
tri-county footprint provided valuable
feedback regarding the region's most
pressing issues and identified how our
donors' grants can have the largest
impact. The experience and knowledge
of those who serve in our community
on a daily basis provides a unique
opportunity to make a powerful impact.

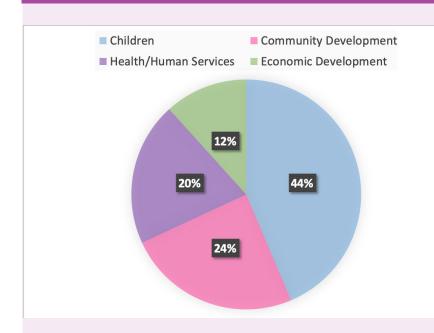


"THROUGH A PATHWAY OF HOPE, WE NEED TO SUPPORT YOUNG FAMILIES TO HELP THEM BREAK FREE FROM THE CYCLES OF DEPENDENCY THEY ARE IN. IT IS IMPORTANT THAT CHILDREN SEE THEIR PARENTS SUCCEEDING SO THAT WE CAN PUT A STOP TO THE GENERATIONAL DEPENDENCY ON COMMUNITY SERVICES." - SURVEY COMMENT

### **Where Grants Can Have Impact**

RESPONDENTS FELT THAT EXPANSION IN THE FOLLOWING IMPACT ZONES WOULD

BE THE MOST EFFECTIVE IN ADDRESSING THE REGION'S TOP TEN PROBLEMS.







### The Powerful Effect of the Fatherless Home

- 63% of youth suicides are from fatherless homes
- 90% of all homeless and runaway children (32 times the national average) are from fatherless homes
- 85% of all children who show behavior disorders are from fatherless homes
- 80% of rapists with anger problems are from fatherless homes
- 71% of all high school dropouts are from fatherless homes

"THERE IS A MORAL CRISIS. CHILDREN IN OUR COMMUNITY ARE DEVELOPING AN ATTITUDE THAT SOCIETY SHOULD TAKE CARE OF THEM AND THEIR FAMILIES. AS THEY GROW INTO YOUNG ADULTS, LITTLE SELF-CONFIDENCE LEADS TO NO SELF-RELIANCE." - SURVEY COMMENT

# "GOD'S BEEN GOOD TO US SO WE WANT TO GIVE BACK. AND IT'S A GREAT FEELING TO KNOW WE'RE DOING THAT." - JAMES WELLER, SR.

### **GENERATIONAL GIVING.**

The Weller Family's generosity spans three generations...so far.

Some people just seem to have a philanthropy gene baked into their DNA. That's certainly true of the Weller family, whose third generation is following the pattern of helping those in need. It began with James Weller, Sr. and his wife, Geraldine (Gere), who created the James T. & Geraldine A. Weller, Sr. Family Foundation in 2006.

"It's like an open foundation," explains James Weller, Sr. "Each year we donate to the Cleveland Clinic and St. Elizabeth Hospital, but we also donate to charities that help individuals and children specifically."

From helping children who need dental work to aiding single mothers who can't afford to pay

their rent, the Wellers' goal is to help those in the Trumbull County community, as well as charities in Mercer and Mahoning counties, on an as-needed basis. Along with its targeted donations and support of organizations such as Inspiring Minds, the James T. & Geraldine A. Weller, Sr. Family Foundation looks to fulfill larger grant applications from local organizations by partnering with other funds under the Community Foundation's umbrella, including the O'Brien Children Memorial Fund.

Weller, Sr. has been an important participant in the Community Foundation since it was founded in 1981, having served as the organization's

President as well as currently holding a Board position.

He believes in leadership by providing assistance when and where it's needed. Thus, when he and Gere wanted to do more philanthropically, it made perfect sense to establish their own fund within the Community Foundation.

"What we want to do is help children and the elderly," says Weller. "That's the area that we directed ourselves toward and a big part of our foundation. God's been good to us so we want to give back. And it's a great feeling to know we're doing that."



James and Geraldine Weller

Without a doubt, the example set by the senior Weller family members influenced the third generation, specifically brothers Jimmy and John Weller and Jimmy's wife, Katie. The three founded the Beacon of the Valley Foundation in 2018 to address the needs of children ages twelve and under in the area including the counties of Mercer, Trumbull, and Mahoning.



The Weller family business, Liberty Steel Industries, is a vital part of the local community.

## "WE HAVE BEEN BLESSED WITH SO MUCH, WE FEEL IT'S OUR JOB TO HELP BLESS OTHERS." - JIMMY WELLER



Jimmy Weller started giving back during his racing career.

"It was something my wife and I started talking about right after we got married in 2017," Jimmy recalls. "We talked about different areas where the kids need the most help to get the start in life that they deserve and how we could help that a little bit."

Like their grandfather, the next generation of Wellers looked to the Community Foundation after deciding that they, too, wanted to make a difference.

"The Foundation does an awesome job," says Jimmy Weller. "You can start a charity with \$20, and they're going to help you do it. They give anyone the ability to start a fund, no matter how much they have or what their intent is. They do the legal work so you can concentrate on making an impact."

The Wellers recruited other like-minded community members—Chad Wagner, Mike Delliquadri, Chris Chaky, Emily Hendershot and Annie Colucci—to help to organize events to secure additional donations to the Beacon of the Valley fund. Activities such as Purse Bingo, Sip and Paint, and a golf outing were so successful the first year that Beacon of the Valley was able to start its support earlier than planned. In addition to donating to Inspiring Minds' giving tree to help purchase gifts for children twelve and under in the Warren area, the Foundation also participates in Akron Children's Hospital's Safe Sleep program.

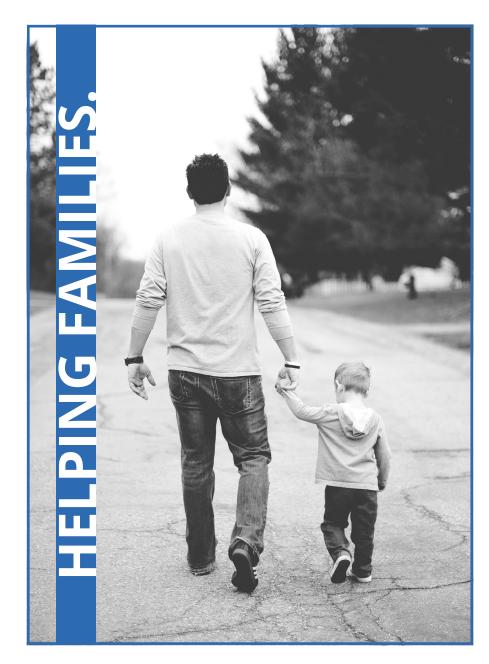
"To have as much support as we've had in the past two years has been unbelievable," says the younger Weller, acknowledging the assistance from area businesses such as Halliday's Winery, Hartford Hill Winery, and Deer Creek Golf Course. "We raised enough money that first year that we started our donations ahead of schedule. It's a great feeling at the end of a successful event to see how it has all come together and how good people are. Everyone we've talked to about contributing to Beacon of the Valley has been happy to participate."

Plans are underway for a major fundraiser which will include a nod to Jimmy Weller's career as a professional race car driver. Although now retired due to an injury, he has stayed connected with the sport, and several of his former colleagues will be part of the event.

"It's not fair what happens to some children, but if we can help take away some of their pain, it makes everything we do worth it. It's an awesome feeling knowing that we are able to help make childhood easier for area kids." Echoing his grandfather's words, he adds, "We have been blessed with so much, we feel it's our job to help bless others."



The Beacon of the Valley's fundraisers like Sip and Paint and Purse Bingo contributed to the fund's strong start.



# BUILDING A BETTER FUTURE

#### CREATING A STRONGER COMMUNITY BY MEETING FAMILIES' NEEDS

Social problems—addiction, unemployment, homelessness—do not exist in isolation. They actually have a domino effect, touching first the person experiencing the issue, then the family, and, eventually, the whole community. When this happens, it is always the children who are most vulnerable.

Due to this fact, the Community Foundation donors take great pride in supporting area non-profits and social service organizations that provide assistance to area families, helping both children and their parents achieve a better quality of life, and, by extension, improving the community as a whole.

### BUILDING A BETTER FUTURE FOR OUR CHILDREN

With the knowledge that children bear the brunt of an

unstable home environment, many of our donors help fund organizations that focus on the educational, psychological, and emotional needs of children from birth through early adulthood. For example, the Safe Sleep program through Akron Children's Hospital Mahoning Valley educates and equips expectant mothers to create a safe sleep environment for their newborn babies.





Pre-Kindergarten educators, such as the **Zion Education Center** and **Grove City YMCA**, receive money to offer scholarships that will help young children navigate the educational path ahead.

Elementary students receive essential school supplies, and in many cases, food so that they do not go hungry over the weekend, through The Patchwork Foundation's Backpack program. Both Inspiring Minds and West Hill Ministries sponsor free after-school and summer programs—a better and safer alternative than having the children home alone and unsupervised during what has been dubbed the "Danger Zone". While organizations such as Mercer County Mentoring connects children in single parent households with caring mentors who offer academic assistance and exposure to new opportunities.





MERCER COUNTY MENTORING

TO PROVIDE A MENTOR
TO A CHILD IN NEED.

















### **GROWING NEEDS FOR GROWING CHILDREN**

As children move into adolescence, their needs become broader and more diverse. In response, our donors support a wide range of services from the **Robotics Programs at New Castle and Sharon** high schools to the after-school Youth Arts programs at **Hope Center for Arts and Technology (HopeCAT)**. Teenaged foster children who are struggling to find a sense of security under very difficult circumstances benefit from aid provided by the **Lawrence Community Foundation's Filling in the Gaps** program.

Finally, high school graduates whose desire to attend college or trade school that is thwarted by their economic situation can receive financial aid from over 200 scholarship funds within the Foundation. This not only increases their prospects for securing good-paying jobs in the future, but also benefits area employers, who are in need of trained, qualified workers.



"It is easier to build strong children than to repair broken men."

- Frederick Douglass





### NORTH EAST SERVICES FOOD & CLOTHING EXCHANGE

JUST \$1 PROVIDES SIX MEALS FOR A HUNGRY CHILD IN NEED





\$5,000 PROVIDES A YEAR'S WORTH
OF FUNDING FOR THE
MOMS-2-MOMS PROGRAM

### **DEVELOPING A SUPPORT NETWORK FOR OUR FAMILIES**

With the financial support of our donors, area organizations are able to step into the breach and offer ongoing family assistance that will help in creating a stable life for children at home.

Families in need of affordable housing, furniture, and other necessities can turn to organizations such as **Trumbull Neighborhood Partnership**, **Prince of Peace**, and **Christian Assistance Network**. Food pantries such as **North East Services Food and Clothing Exchange (NESFACE)** ensure that parents and children receive the food they need. The **Moms-2-Moms** support group has helped more than 250 single mothers in the local area with support and encouragement in its seven years of existence.

And for those who need shelters from sexual, emotional and/or physical violence, the **Crisis Shelter of Lawrence County** not only provides a safe haven and therapy, but also works to stop violence and abuse through prevention education, intervention training, and public awareness.

Most critically of all, however, is the need to concentrate on the underlying issue of addiction. A pervasive problem that can be found in every socioeconomic and demographic level, drug and alcohol addiction not only affects the life of the addict but also the family and the community as a whole. Many of the agencies supported by the Community Foundation deal with the ramifications of addiction through the programs they offer—either directly to the person battling this illness or through support services for those whose lives are also impacted.

Thanks to the generosity of our donors, the Community Foundation can help support area organizations that, in turn, support those most in need—a ripple effect that will be felt for generations to come.



# EVERYONE CAN BE A PHILANTHROPIST WITH THE COMMUNITY FOUNDATION.





## FOREVER.

## FOR ALL FUTURE TIME, FOR ALWAYS.

Mary Ellen Sotus

### Supporting a charitable cause forever is a powerful concept.

This type of legacy is exactly what can be accomplished by creating an endowed fund with the Community Foundation. Since only the income from the endowment is made available for grants on an annual basis, donors can ensure that charitable organizations will receive support in their family name, or that of a loved one, in perpetuity.

### What a way to leave a legacy!

Mary Ellen Sotus, of Sotus candy fame, loved the concept of supporting a cause forever.

As a result, upon her passing, the Sotus Foundation, an endowed fund, was established. Mary Ellen's passion was helping young women achieve a college education, and her Foundation provides assistance to Lawrence County women by paying their bills while they are in school.

Mrs. Sotus thought that having to take extra shifts at a part-time job to pay for things such as utility bills or gas for their cars would take students away from their studies and would act as an impediment to reaching the goal of graduation and getting a permanent job in the workforce.

### **LASTING IMPACT**

Since Mary Ellen's passing in 2004, the Sotus Foundation has given over \$300,000 in support to 29 women who have worked to improve their own lives as well as the lives of those around them...and these numbers will continue to grow...forever.

66

I think about the various people who have been instrumental in helping me and my children survive following the tragedies we faced, and the Sotus Foundation is very high on that list. Without the Sotus program, I would have been unable to afford the time off work I needed for nursing school. Period.

This was **LIFE ALTERING**. If I had continued on the path I was on, my children and I would have been homeless in a matter of years.

The Sotus Foundation made it possible for me to not only lift my own life up, but also the lives of every patient that I now take care of.

THANK YOU FROM THE BOTTOM OF MY HEART!

Lisa Madras



## SOTUS

Being able to participate in the Sotus Program has given me the financial means to not ask myself if I can afford groceries or gas that week

I often think of the program when going through my textbooks to study and know someone was kind enough to help me and take some of that burden away to afford that book.

Because of the help in paying for a car, I was able to apply to a new job, where I am working better hours for my class schedule.

I OWE A HUGE THANKS TO THIS PROGRAM!

Danielle Bain







**Field of Interest Funds** give donors the opportunity to support worthy causes that advance specific aspects of community life.

The Almira Foundation was created to help the youth and elderly populations within Lawrence County. After review, the fund provided a grant to Cray Youth and Family Services' mentorship program. Why?

Forty percent of the children in Lawrence County live in single parent or non-traditional homes. A mentor is the only person in a foster child's life who is not being paid to be there. This makes a mentor relationship incredibly important.

By providing this grant, the Almira Foundation was able to help at-risk youth during the most formative period of their lives.



## TYPES OF FUNDS



DONOR-ADVISED FUNDS

**Donor-Advised Funds** provide donors with the largest flexibility to support charitable organizations that they hold close to their hearts.

The Shohayda Family Charitable Fund was established by Fred and Lori Shohayda to support charitable efforts on which their family want to have an impact. One such charity is Canine Companions for Independence, which exists to provide support dogs to people with disabilities at no cost to the recipient.

Beyond the emotional attachment, these companions can open doors, pick up items, and also turn on lights. Rae Lynne (Fred and Lori's daughter) even volunteers and raises puppies for the organization!



SCHOLARSHIP FUNDS

scholarship Funds provide assistance to our next generation of leaders as they embark on their next scholastic journey after high school. With the costs of attending college or a trade school increasing, these young men and women rely on the generosity of donors to help them reach their full potential.

The following is an excerpt from a thank you letter that was sent to the Charles and Margaret Verholek Scholarship Fund.

"It has been a blessing to receive this scholarship the past 4 years. I promise that your investment in me will not go to waste, and I, too, will give back to the community that has given me so much."



DONOR-DESIGNATED FUNDS





**Donor-Designated Funds** 

provide piece of mind for donors that the charities they supported during their lifetime will not suffer upon their passing.

Because only the income of these funds is made available on an annual basis, the donors' charitable interests will be supported forever.

The J. Richard and Elaine G.
Kelso Charitable Foundation was
established by the Kelso Family
to support their church, Thiel
College, and the Salvation
Army in perpetuity.

01

02

03

### YOUR INVESTMENT STAYS IN OUR COMMUNITY FOREVER.

The Community Foundation of Western PA & Eastern OH makes it easy to give by facilitating a variety of methods including:



**CASH & CHECKS:** We confirm donations and provide a signed receipt to the donor that will correspond to the deposit. Unless made after banking hours, all donations are deposited on the same day.



**REAL ESTATE:** The Community Foundation can accept marketable real estate as a donation to help donors to reach their charitable goals.



**CREDIT CARDS:** Our donors can donate using a credit card by visiting our website (www.comm-foundation.org) and clicking on the "Donate Now" button.



**PERSONAL PROPERTY:** Looking to support an auction at a fundraiser? The Community Foundation will acknowledge donations of personal property that can be sold to support local charitable efforts.



**SECURITIES:** Securities can be transferred in-kind to one of our brokerage accounts, allowing our donors to take advantage of significant tax-saving strategies.



**IRA ROLLOVER:** Required Minimum Distributions can be rolled over directly to the Foundation, allowing the donor to pay zero income taxes on the distribution.



**LIFE INSURANCE:** Donors can build an endowment by making the Community Foundation the beneficiary of a life insurance policy. Also, premium payments will be tax deductible!



**CROPS:** The Community Foundation has partnerships in Lawrence, Mercer, and Trumbull Counties that allow local farmers to contribute to a fund by donating a portion of their crop deliveries.



CHARITABLE REMAINDER TRUSTS:
Donors can get a tax deduction while receiving a reliable stream of income during their lifetime, then support their favorite charities upon their passing.



**RETIREMENT PLAN ASSETS:** Donors take advantage of tax-saving strategies for estate planning by supporting charities with their retirement accounts while providing for their families with more favorable tools.

## DOES YOUR BUSINESS PAY PA STATE TAXES?

### STOP SENDING MONEY TO HARRISBURG.

The Pennsylvania Educational Improvement Tax Credit (EITC) program gives businesses the opportunity to help our local kids by providing scholarships to pre-kindergarten and K-12 educational programs.













































**Synergy Comp Insurance Co.** 

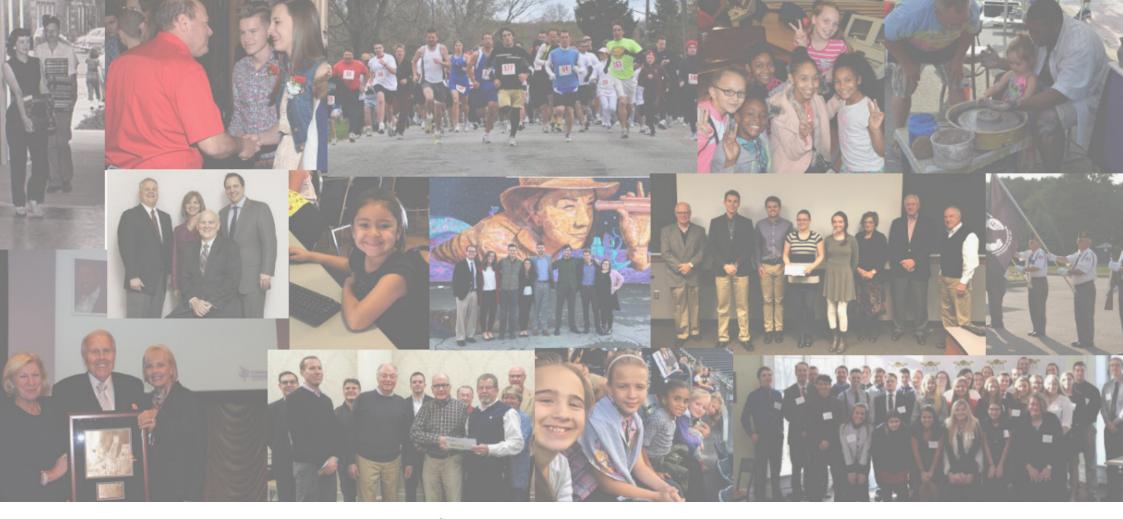


Lew Kachulis
President and CEO

"The EITC program has enabled Gilbert's and Synergy Comp Insurance to direct over \$150,000 annually to local nonprofits that support early child education, such as Success By Six, the Buhl Club's Child Development Center, and Zion Education Center.

These programs prepare Pre-K children for their first day of school so that they are not left behind. Gilbert's and Synergy Comp are excited to support our community's youth!"

Local businesses have provided **OVER \$1,000,000** in support through the program in the last 5 years alone!





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