



## Connections Looks to the Future of Philanthropy

Connections Fund members and their children visited the Peacock Playhouse at Kingwood Center Gardens. A Connections Fund grant made the educational playhouse a reality.

The Connections Fund at the Richland County Foundation was established in 2004. Its mission is to foster and retain young leaders while promoting a philanthropic identity and involvement in Richland County. The Fund was born out of a desire to engage more young people in philanthropic giving and strategy, thereby creating the community leaders of the future.

The Connections Fund leadership committee has set a goal to grow its membership to 100 philanthropic-minded individuals.

Gifts to the Fund can be made for as little as \$150. The Connections Fund embodies the true spirit of community foundations: a collection of individuals, families, and organizations leveraging their collective investments and interests to improve people's lives.

Connections Fund provides a unique opportunity to socialize as well as pull back the curtain on the non-profit community to better understand the needs and work being done in this public charity sector.

But things change, the economy, community needs, and the unstoppable march of father time. No revelations here, right?

How does the Connection Fund introduce itself to the next generation of community supporters? A group identified by the Pew Research Center as listening to their peers long before parental-aged figures; wanting to live in fun places and treasuring the experience more than objects.

Key points to Millennial Engagement through the Connections Fund:

- Giving back to the community with no monetary investment
- Something to do over the weekend
- Making new friends
- Maybe a free beer or two

So whether you are giving to or engaging with, the Connections Fund is uniquely suited to the pooling of time, talent, and treasure of our emerging leaders.



## Groves Elected to Statewide Philanthropy Board

*Richland County Foundation President Brady Groves has been elected to serve a three-year term on the Philanthropy Ohio Board of Trustees.*

*Groves was elected during the Philanthropy Ohio annual meeting in Cleveland.*

*Philanthropy Ohio is a statewide membership association that provides the network, tools and knowledge to help people engaged in philanthropy become more effective, powerful change agents in their communities.*

*Groves has served as president of the Richland County Foundation since 2011. During his tenure, he has helped create a five-year economic development investment strategy, a nonprofit capacity building academy and a day of giving. The foundation is evolving into a responsive grant maker so it can better meet emerging needs in the community.*

*The Richland County Foundation assets exceed \$156M. Each year the board of trustees grants more than \$4M to nonprofit organizations.*



Merris Welge

*"CGAs are good for people over the age of 65 because by that age you should have a better idea of your financial picture for the rest of your life. The logical age to sign up for a CGA is 70 to 80. Although any time past the age of 60, a CGA can be advantageous in certain tax situations," said Merris.*

**Richland County Foundation follows the annuity rates established by the American Council on Gift Annuities.**

*Sample one-life rates (lower two-life rates are available):*

Age	Annual Annuity Rate
60	4.4%
65	4.7%
70	5.1%
75	5.8%
80	6.8%
85	7.8%
90+	9.0%

## Give and receive with a Charitable Gift Annuity

An annuity is the payment of an annual income or allowance. A charitable gift is, well, a gift to charity. Put them together and you have a Charitable Gift Annuity -- the giving technique with something for everyone. It's an ideal plan for those who'd like to make a significant gift but depend on the income from their assets.

The Richland County Foundation offers Charitable Gift Annuities to donors as one option to help them fulfill their charitable intentions.

Merris Welge and his wife Jean recently set up a CGA at the Richland County Foundation. The Welge's have two other CGAs; one with the Salvation Army and another with the Sertoma Club.

Merris likes the investment because it can help a nonprofit organization and provide an income stream to the individual. Additional reasons Merris likes CGAs are the tax deduction and a higher interest rate than a traditional savings account or certificate of deposit. Plus a portion of the quarterly interest payment may be treated as a capital gain depending on the source of the original gift, resulting in a lower income tax rate.

Consult your professional advisor to determine if a CGA is a good investment for you.

### What is a CGA?

A Charitable Gift Annuity (CGA) is a simple contract between a donor(s) and Richland County Foundation. In exchange for a contribution from a donor(s), the Foundation promises to make fixed payments for life to one or two annuitants.

The Foundation invests and manages the contribution, and when the last annuitant has died, uses the remainder of the contribution for its charitable purposes.

The amount of fixed payments paid is based on the age of the annuitant(s). Annuity payments are made in quarterly installments and may be deferred until you reach a specified age. Annuity payments and tax advantages are normally greater when you defer the payments to a later date.

### How does it work?

- Charitable Gift Annuities can be set up for individuals and couples starting at age 60.
- The minimum amount to set up a CGA is a \$10,000 gift to the Richland County Foundation—you can give cash, appreciated stocks, or other marketable securities.
- If the total contribution is \$25,000 or more, a separate named fund with your personal charitable directions will be established upon your death.
- We set up a contract with you that combines annuity payments with a charitable gift.
- You receive a stream of income that is fixed, regardless of market conditions.
- You also receive an immediate tax deduction for the charitable portion of your gift as determined by IRS rules.
- Upon your death, any residual balance will remain with the Richland County Foundation.
- Your gift will be placed into an endowment that is invested for long-term return. Earnings from your fund are used to make grants addressing community needs in accordance with fund directions.
- Your gift—and all future earnings from your gift—is a permanent source of community capital, helping to do good work forever.

## Foundation to assist nonprofit organizations build capacity

The Richland County Foundation is accepting applications for its Osborne Meese Academy. The Academy, named to honor the Foundation's founding father, was established to build capacity for nonprofit agencies, serve as an informational resource and act as a catalyst to encourage stronger collaboration in the community.

The Academy encompasses three key components: education, professional support and grant writing assistance.

Half-day educational workshops will be held February through November at the Foundation, 181 South Main Street. Topics such as developing a marketing and fundraising plan, engaging in collaborations, board development and identifying outcomes and measures will be explored.

Each nonprofit agency can bring two staff or board members to each session. The annual fee is \$250 with the potential for financial assistance available.



A Strategic Planning Session at the Osborne Meese Academy was led by Joel Kessel of Kessel Communications. The Foundation is accepting applications online for the Academy at [richlandcountyfoundation.org](http://richlandcountyfoundation.org) through Dec. 8.





The Ohio State University at Mansfield received a Women's Fund grant for a STEM Camp for 40 girls. The camp held at Springmill Learning Center, was designed to provide girls the opportunity to explore their interest in STEM-related fields and to learn from successful women who work in STEM-related careers, empowering them to consider a new world of career options.



The focus of the UMADAOP SALT program, funded in part by a grant, is to prepare youth for employment. They learned on the job training and other skills. The team landscaped throughout the summer to stem the tide of blight in Mansfield.



The Richland Academy of the Arts hired its first ever Director of Music, Greg Carter with the help of a Foundation grant. Executive Director Marianne Cooper introduced Greg to the community during a news conference at the Richland Academy.

## Foundation approves over \$2M in grants

The Richland County Foundation Board of Trustees approved \$2,051,238 in grants to area nonprofit agencies during its October meeting.

Kingwood Center Gardens received a three year grant from the community fund to help build a visitor center. It will be constructed near the Trimble Road entrance and will serve as a welcome center and banquet hall. The new facility will provide visitors a place to purchase tickets, consider the benefits of membership, learn about volunteer opportunities, gather information, plan their visit and learn the rich history of Kingwood Center.

Other nonprofits that received grants for projects and programs from the community fund that are impacting area residents include:

- **Catholic Charities** to provide individual assistance.
- **City of Mansfield Historic Preservation Commission** to submit a nomination to the National Register of Historic Places for an area in Downtown Mansfield. The district will allow building owners to apply for historic tax credits for certain building renovations.
- **Dayspring Assisted Living & Care Facility** for security enhancements.
- **Northwest Ohio Scholarship Fund** for scholarships for low income students to attend private, charter or home school.
- **Shelby YMCA** for a boiler and roof replacement project.

The Board of Trustees approved additional grants from donor advised funds to meet emerging needs to the following organizations:

- Ashland University
- Bellville Neighborhood Outreach Center
- Capital Research Center
- Catalyst Life Services
- Catholic Charities
- City of Mansfield
- Dayspring
- Discovery School
- Downtown Mansfield, Inc.
- Flying Horse Farms
- Friendly House Assoc.
- Friends of Gorman Nature Center
- Greater Houston Community Foundation
- Kingwood Center Gardens
- Little Buckeye Children's Museum
- Lucas Community Center
- Lucas Schools Sustaining Fund
- Madison Local Schools
- Mansfield Area Y
- Mansfield Art Center
- Mansfield City Schools
- Mansfield Memorial Museum
- Mansfield Playhouse
- Mansfield Rotary Foundation
- Matthew 25 Outreach
- Mid Ohio Guardianship Services, Inc.
- North End Community Improvement Collaborative
- Northwest Ohio Scholarship Fund
- Ohio Bird Sanctuary
- Ohio Genealogical Society
- Ohio State University Foundation
- Parent Aide Program
- Raemelton Therapeutic Equestrian Center
- Richland Community Development Group
- Renaissance Performing Arts Association
- Resurrection Parish
- Richland Academy of the Arts
- Salvation Army
- Shelby YMCA Community Center
- St. Luke's Point of Grace of Mansfield, Ohio
- The Leadership Institute
- Upper Room Ministries

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The Richland County Foundation is recognized for having organizational and financial practices that are in compliance with National Standards for U.S. Community Foundations.



[RichlandCountyFoundation.org](http://RichlandCountyFoundation.org)

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## What if we all gave on the same day?

Richland Gives, an online day of giving, is set for November 28 through 7 p.m. Richland Gives donors will be able to make their online donations early and they will still count toward the giving day totals for each nonprofit.

The day is designed to encourage everyone to contribute to local nonprofits they care about through a single giving platform/website. The Richland County Foundation is hosting the day to build capacity, grow philanthropy and make the community stronger.

Thanks to the generosity of donors at the Richland County Foundation, incentives will be awarded as grants to nonprofit organizations participating in Richland Gives, beyond what they raise from online donations.

Two events co-hosted by the Foundation will be held on November 28: a Food Truck Rally and Nonprofit Showcase from 12- 1:30 p.m. at the Recreation Center at the Ohio State University at Mansfield Campus and a Leader Board Watch Party from 5-7 p.m. at the Phoenix Brewery in Mansfield. Nonprofit organizations will have the chance to earn additional prizes by attending each event.

Individuals can set up a fundraising page for a nonprofit organization by following these steps:

1. Go to [richlandgives.org](http://richlandgives.org)
2. Click the search icon to find a nonprofit organization
3. Click the fundraiser button
4. Set up a page
5. Share the information with friends and family members