

COMMUNITY IN FOCUS



2011 Annual Report



Community Foundation
of the Mahoning Valley
Your legacy. Our future.

Letter to the Community

This year's *Annual Report* marks a very important milestone. In October we began our 11th year in operation – our second decade! The milestone did not pass by without notice. We took the opportunity to look internally and reassess our strategy for the next decade and beyond. Our first decade was formative, enhanced by the achievement of our National Standards Certification. That certification assured us that we have the processes and procedures in place to deliver a strong and responsive community foundation to the Mahoning Valley. But that wasn't quite enough. It also provided the jumping-off point for an expanded strategic approach. With the convening of a group of community leaders, strategy meetings were held that produced a new blueprint which will begin to shape our second decade. New objectives were agreed upon, including an enhanced leadership role with a keen focus on community needs, strategic collaborations and impact beyond traditional grant making. And so, our second decade has begun with the same excitement we felt as we launched our first. There is much good work to do.

The pages of this report will detail the work we do as a collaborator, convener and leader in philanthropy, and will recognize the donors, funds and organizations that have made our work possible and necessary.

The success of all community foundations is dependent on the support of the communities they serve and we are ever mindful that our progress would not be possible without your support. Whether you are a loyal donor or a non-profit colleague, we are grateful for the opportunities we have to work with you and for the confidence you have in us. We are proud to be stewards of our community's foundation – your foundation – and it is with our sincere thanks that we submit our *Annual Report* to you.



Tom Fleming
Board Chairperson



Patricia Brozik
President

“THE PAGES OF THIS REPORT WILL DETAIL THE WORK WE DO AS A COLLABORATOR, CONVENER AND LEADER IN PHILANTHROPY, AND WILL RECOGNIZE THE DONORS, FUNDS AND ORGANIZATIONS THAT HAVE MADE OUR WORK POSSIBLE AND NECESSARY.”

ON THE COVER

Neighborhood Ministries programming. Neighborhood Ministries provides high impact after-school programs, family assistance services, and job training for residents living in low income neighborhoods in Mahoning County, Ohio.



Confirmed in compliance with National Standards for U.S. Community Foundations. This designation places us in the top philanthropic tier nationally.

About Us

The Community Foundation is a leader in philanthropy across the Mahoning Valley, working to match donors who care with causes that matter, while continually encouraging collaborative community efforts. The Community Foundation has provided grants of nearly \$14 million to over 300 charitable and educational institutions. Currently, the Foundation administers \$20 million in assets. The Foundation also provides investment management, grantmaking and other services to over 90 donors and agencies. The Foundation has also received public support from over 800 individual donors.

Our History

The Community Foundation of the Mahoning Valley, a public charity, was incorporated in 1999 by five area trust companies and community partners, to address charitable and philanthropic needs across Mahoning and Trumbull Counties.

Our Mission

The Mission of the Foundation is to attract and invest permanent resources, with the purpose of enhancing the quality of life for the residents of the Mahoning Valley and future generations, in accordance with the charitable intentions of its donors.

To fulfill this mission, the Foundation will:

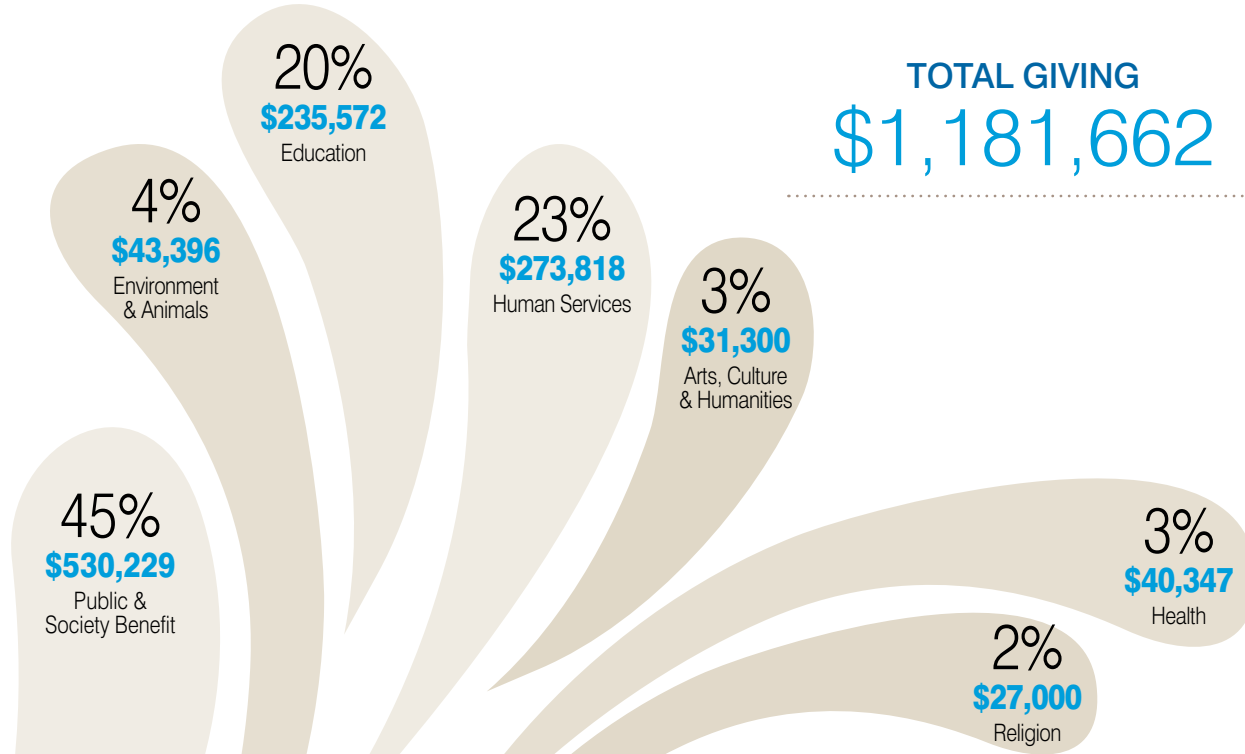
- Identify and support community based charitable purposes in the areas of health, education, economic development, human services, historical, cultural and environmental activities.
- Respond to community needs through philanthropic leadership, commitment, and compassion.
- Demonstrate accountability and integrity in the management of resources.

TOC

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By the Numbers

TOTAL GIVING
\$1,181,662



Nonprofit Category Definitions

1. ARTS, CULTURE, AND HUMANITIES | Encompasses museums, opera companies, symphony orchestra, theaters, libraries, etc. Primarily consist of community-based organizations.

2. EDUCATION | Consists of private nonprofit elementary, secondary, and post-secondary educational institutions, as well as organizations that provide educational services. Primarily local groups with affiliated national and international groups.

3. ENVIRONMENT AND ANIMALS | Focuses on programs that strive to improve local and national environments, cities, landscapes, etc. Also includes programs that provide humane services to animals.

4. HEALTH | Includes hospitals, clinics, nursing homes, and allied health care organizations. Primarily local groups controlled by local boards of notables.

5. HUMAN SERVICES | Encompasses a wide range of assistance to different population groups including elderly, homeless, etc. Primarily local, but many are affiliated with national and international parent organizations.

6. PUBLIC AND SOCIETY BENEFIT | Focuses on ways of strengthening communities in the areas of employment, economic development, housing, education, and healthcare. Primarily local grassroots organizations.

7. OTHER | Any organization that does not fit into one of the above categories.



“Community Solutions Association Board and Staff wish to thank, and commend The Community Foundation of the Mahoning Valley for their decision to impact the future of the Valley by investing in CSA’s Project KIND. Project KIND is a universal kindergarten classroom-based curriculum designed to increase students’ school success by building social and emotional competence and self regulation skills. This collaborative effort and the Foundation’s generous contribution has enabled us to expand Project KIND into Girard City Schools, as well as, support our existing Project KIND efforts in Youngstown City Schools.”

— Ken Lloyd,
President and CEO,
Community Solutions Association

Grantees

July 01, 2010 – June 30, 2011

Akron Children's Hospital, Mahoning Valley
ALS Care Project
Angels for Animals
Ballet Western Reserve
Beatitude House
Big Brothers and Big Sisters
Blessed Sacrament Parish
The Butler Institute of American Art
Catholic Charities
Catholic Diocese of Youngstown
Children's International Summer Villages
Children's Rehab Center
Community Legal Aid
Community Solutions Association
Crisis Pregnancy Center of Mahoning Valley
The Difference Makers
Eastern Gateway Community College
Easter Seals of Mahoning, Trumbull,
and Columbiana
The English Center of Youngstown
Family Service Agency
Fellowship of Christian Athletes
Fund For Our Economic Future
Girl Scouts Lake to River Council
Goodwill Industries of TN
Greater Western Reserve Boy Scouts
Help Hotline Crisis Center
Humility of Mary Health Partners
Development Foundation
John F. Kennedy High School
Jubilee Gardens
Junior Achievement
Junior League of Youngstown
Kent State University Foundation
Leadership Mahoning Valley
Mahoning Valley College Access Program
Mahoning Valley Dispute Resolution Services
Mahoning Valley Historical Society

Mahoning Valley Organizing Collaborative
Mahoning Valley Sojourn to the Past
Men's Garden Club of Youngstown
Meridian Services
Mesopotamia Kids Playground
Millcreek Children's Center
Mollie Kessler School
Nature Conservancy in Indiana
Neighborhood Ministries
Neil Kennedy Recovery Clinic
Northeast Ohio Council on Higher Education
Oblate Sisters
The Ohio Foundation of Independent Colleges
Ohio Grantmakers Forum
Ohio Presbyterian Retirement Services
One Step to Life, Inc.
Operation Learning Community Program, Inc.
Penn State Milton S. Hershey Medical Center
Poland Village Gardeners
Potential Development
Public Library of Youngstown & Mahoning County
The Rich Center
Safehouse Ministries
Salem Community Theatre
Salineville Southern Alumni Community
Scholarship Foundation
The Sebring West Branch Community Foundation
Second Harvest Food Bank
Sisters of Humility of Mary
SMARTS
Southside Ministries
St. Edward Church
St. Joseph's Healthcare Fund
St. Mary's
Summer Festival of the Arts
Susan G. Komen for the Cure
Trumbull Art Gallery
University of Akron

Ursuline High School
Ursuline Sisters/HIV/AIDS Ministry
Walsh University
West Boulevard Elementary School
Westminster College
Wick Neighbors
YMCA-New Castle
YMCA of Trumbull-Warren Branch
YWCA of Warren
YWCA of Youngstown
Youngstown Area Goodwill
Youngstown CityScape
Youngstown City Schools
The Youngstown Connection
Youngstown Early College
Youngstown Hearing & Speech
Yng/Mah Valley United Way
Youngstown Neighborhood Development Corp
Youngstown State University
YSU Center for Urban Studies
Youngstown Symphony Society
Youngstown Warren Regional Chamber

How to Apply for a Grant

Geographic Scope:

The Foundation welcomes grant applications from eligible tax-exempt organizations under Internal Revenue Service 501(c)(3). Eligible organizations must be located within the Mahoning Valley Community (Mahoning and Trumbull Counties) as well as surrounding areas, or provide services contributing to the well being of the residents of the area.

Types of Grants:

Program Support • Project Support • Capital Needs • General Operating Support, *under limited circumstances*.

Application Process:

Grant applications are considered quarterly. Applications are available on our website at www.cfmv.org, or by calling the Foundation office at 330-743-5555. For more information on the Foundation's grant process please visit our website.

ROW'S NEEDS

Community Engagement

Community foundations act as conveners and work to foster collaborative efforts. The Community Foundation of the Mahoning Valley's Board of Directors recognizes the need to showcase, encourage and strengthen philanthropy. We have implemented a new strategic plan to reassess priorities and expand non grantmaking leadership opportunities. The goal is to involve more for the benefit of all.

Convener

FUND FOR OUR ECONOMIC FUTURE

Begun in 2004, the mission of the Fund is to encourage and advance a regional competitiveness agenda which will lead to long-term economic revitalization that strengthens our region's core cities, encourages inclusion and enhances the region's quality of life. As a member of the Fund, the Community Foundation is proud to be the convener for the Mahoning Valley Roundtable discussions.

MAHONING VALLEY GRANTMAKERS ASSOCIATION

The Mahoning Valley Grantmakers Association is an association of our area's most active grantmakers, convened by the Community Foundation as its founding member. The Association meets regularly to discuss and evaluate the current needs of our community as well as the challenges we will face in the future. The Association has created a network among grantmakers and has helped to raise awareness and expertise among its participants.



Leadership

LEVERAGE

Foundation grants often help bring additional resources to the table. In some cases, the multiplier effect is huge – far more resources are brought to bear on an issue than the CFMV could ever invest on its own.

BUILDING ON OUR BEST

Many people and organizations work hard across this community to make it better – we believe in building on those strengths wherever they are, and making sure that citizens have a way to participate in changes that affect their community.

“The Trumbull 100 has been an active participant in the regional meetings for the Fund for Our Economic Future. The Community Foundation has cultivated a collaborative environment for these Roundtable discussions, which are essential to advancing a common economic development agenda.” — Michael P. Craig, Partner, HBK and Past-President, Trumbull 100



“Making connections throughout the Mahoning Valley, the Fund for our Economic Future builds bridges of opportunities including preparing for new energy industries and job creation. Eastern Gateway Community College's work with the Community Foundation provides continuing opportunities to develop excellent connections and to work together for the improvement of the region's future.”

— Dr. Laura Meeks,
President, Eastern
Gateway Community
College

THE WILLIAM SWANSTON

The William Swanston Charitable Fund became a supporting organization of the Community Foundation of the Mahoning Valley in October 2010. Supporting organizations, by definition, are designated by the IRS as organizations that support the grantmaking activities of community foundations. Most notably The William Swanston Charitable Fund, previously limited to Mahoning County, was granted permission by the court to include Trumbull County organizations in their grantmaking. This better reflects the footprint of the Community Foundation of the Mahoning Valley and The Raymond John Wean Foundation.



“What happened with The William Swanston Charitable Fund, the Community Foundation of the Mahoning Valley and The Raymond John Wean Foundation is an example of collaboration and merger at their finest. The organizations and individuals involved abandoned their own self interests, modified their cultures to allow group decision-making and vigorously pursued an agenda designed to bring positive change for children and youth in the Mahoning Valley. Specifically, we are targeting children with lagging academic performance. We understand that there are often root causes for this poor academic performance and our efforts will focus on an attempt to address some of the underlying causes.”

— Paul Dutton,
Chairman of the Board,
William Swanston Charitable Fund



CHARITABLE FUND

History

William Swanston, a farmer who lived in Canfield Township, was concerned about neglected and abandoned children. Swanston, who died in 1921, left his assets and his large farm to be used to build an orphanage. However, society's ideas and laws about orphanages had changed since his death and trustees of Mr. Swanston's estate were not able to follow his exact wishes. Instead, trustees and the Mahoning County Probate Court worked to meet Mr. Swanston's intent by awarding funding to programs dedicated to the care of abused, neglected and dependent children.

Focused on the Future

In Fall 2010, its current board of trustees approached the Mahoning County Probate Court seeking to implement a change in structure and direction to allow the Fund to have a greater impact in the Mahoning Valley. The William Swanston Charitable Fund turned to The Raymond John Wean Foundation and the Community Foundation of The Mahoning Valley for assistance. The Trustees wanted to use its assets of nearly \$7 million to develop model programs that would inspire and teach others.

The WSCF Board Members

Paul M. Dutton, *chairman of the board*
Frank C. Watson
C. Gilbert James Jr.
Patricia M. Sweeney
Delores Crawford

Proactive Grantmaking

Through its Swanston Innovations Grants Program, the Fund received many requests for funding from various organizations and social service agencies in the Mahoning Valley. After studying best practices of programs dedicated to addressing these lagging educational performance issues, trustees decided to take an unusual step. They contacted several of the potential grantees and asked them if they would take part in a collaborative effort targeting children within the City of Campbell who are not performing well in school.

The response from the potential grantees was strong and immediate, and today this proactive collaborative approach – aptly named Campbell Works for Children - is showing great promise in changing the lives of Campbell elementary school students, as well as strengthening collaboration among the participating nonprofit organizations.

The Community Foundation is proud to align with The William Swanston Charitable Fund and The Raymond John Wean Foundation in this unique approach to grantmaking – and we look forward to updating you on the Fund's future endeavors.

COMMUNITY SOLUTIONS ASSOCIATION
D&E COUNSELING CENTER
FAMILY SERVICES AGENCY
EASTERN OHIO P-16
HELP HOTLINE CRISIS CENTER
MAHONING COUNTY HIGH SCHOOL
NEIGHBORHOOD MINISTRIES
VALLEY COUNSELING SERVICES

TOTAL GIVING IN 2011: \$302,000

The Fund Supports Projects that:

- Improve the academic success of children by providing early intervention for physical, mental and/or behavioral health issues that reduce or inhibit the child's potential to excel.
- Result in greater opportunities for children to achieve academic excellence by overcoming specific barriers in their development.
- Identify or create strategies for abused, neglected, dependent children to connect to stable and permanent families.
- Implement the least confining alternative when involved with the juvenile justice system.

Foundation Contributors

The success of all community foundations is dependent on the support of many types of contributions, both large and small. Every contribution made to our Community Foundation is both valuable and valued.

The following have made contributions between 07/01/10 and 06/30/11 to one or more of the Foundation's Funds.

Access Health Mahoning Valley

Akron Children's Hospital
Mahoning Valley
Dr. Thomas E. Albani Jr.
Ms. Linda M. Arens
Mr. and Mrs. Michael J. D'Amore
Ms. Linda Day
Ms. Sharon A. Hrina
Humility of Mary Health Partners
Ms. Debbie Jurusz
Mr. Richard Keyse
Lake to River Health Care Coalition
Atty. and Mrs. Elliot P. Legow
Rev. and Mrs. Lewis W. Macklin II
MillCreek Oral & Maxillofacial
Surgery Associates
Sr. Jean Orsuto
Seven Seventeen Credit Union
Mr. Matthew A. Stefanak and Mrs.
Cynthia F. Bearer
Mr. and Rev. Robert Thornton Jr.
Warren Ohio Hospital Co., LLC
Youngstown Area Jewish
Federation
The Youngstown Foundation

Athena Scholarship Fund

Mr. and Mrs. Dale Anderson
Mr. and Mrs. James Brozik
Mr. and Ms. Bradley K. Eppinger
Dr. Betty Jo Licata

Better Business Bureau Charitable Fund

AllM Leasing Drivers, Inc.
Axis Enterprises, Inc.
B.J. Alan Company
Mr. Daniel Becker
Better Business Bureau
Mr. Charles L. Booth
Mr. Donald Brooks
Cohen & Company
Mr. and Mrs. Keith E. Downard

Duncan's Bath and Kitchen Center
Edward J. Lewis Inc.
Envelope 1, Inc.
Farris Marketing
Henderson Covington, Messenger,
Newman & Thomas Co., LPA
Hynes Industries
LM Engineering, Inc. DBA LM Cases
Masonry Materials Plus
Mr. John Moliterno
Mr. Mark E. Munroe
The Muransky Companies
Mr. and Mrs. John Potter
The Prodigal Media Company, Inc.
Rhial Supply Co.
Ms. Patricia Rose
Mr. Vincent R. Roth
Mr. Theodore Schmidt
Ms. Diane Seilt-Vasko
Sheely's Furniture & Appliance Inc.
Ms. Teri M. Storey
Mr. Doug Sweeney
Time Warner Cable
WKBN / WYTV-TV
Mr. David C. Yerian
Youngstown State University

Boardman Schools Fund for Educational Excellence

Mr. and Mrs. George M. Albertini
Mr. and Mrs. Anthony Alvino
The Bank of America Foundation
Bliss Foundation
Mr. and Mrs. Keith Brooks
Mr. and Mrs. Loran Brooks
Mr. and Mrs. James Brozik
Mr. and Mrs. Brad A. Calhoun
Ms. Janet M. Calpin
Dr. James T. Chengelis
Mr. and Mrs. Thomas P. Costello
Mr. John Darnell and Mrs. Gwenn
Smith-Darnell
Dr. and Mrs. Robert DeMarco

Mr. Richard L. Eller
Mr. Bruce Friedrich
Henderson Covington, Messenger,
Newman & Thomas Co., LPA
Atty. and Mrs. Mark A. Huberman
Mr. and Mrs. Sidney G. Jones
Mr. William D. Leicht
Mr. Edward Lucivjansky and Mrs.
Barbara Lucivjansky
Mr. and Mrs. Ronald J. Mistovich
Mr. and Mrs. Lawrence Moliterno
Ms. Kimberly S. Poma
Mr. and Mrs. James M. Rosa
Roth Bros., Inc.
Mrs. Mary Alice Schaff
Atty. Louis Schiavoni

Beatitude House

Nancy W. and Bruce R. Beeghly
Family Fund
Kennedy Family Fund

The Boardman Fund

Mr. James Baker
Boardman Community Foundation,
Inc.
Hill, Barth & King, LLC
Key Foundation
Mr. and Mrs. Gregory Krieger
Mr. and Mrs. Stephen C. Liptak
Mr. and Mrs. James M. Rosa
Mr. and Mrs. Jack R. Russell

C. M. Jerry Collins Memorial Scholarship Fund

Ms. Sally Collins
Ms. Betty Davis
JMD Resources, Inc. O. A.
Mr. and Mrs. William D. Mason
Mr. and Mrs. William Talbott
Ms. Sue Mae Tang
Ms. Wendy P. Tang

The Al and Helen Davis Memorial Scholarship Fund

Alliance Credit, LLC
Mr. and Mrs. Anthony Alvino
Mr. and Mrs. Ken Beraduce
Boardman Booster Club
Ms. Laura Burke
Mr. and Mrs. Todd Burkey
Mr. and Mrs. Alan Burns
Mr. Alfred H. Davis Jr.
Mr. Fred Davis
Mr. and Mrs. Richard Delisio
Dr. and Mrs. Robert DeMarco
Ms. Sandra DeVicchio
Mr. David Eliser
Mr. and Mrs. James D. Fox
Mr. and Mrs. Mark J. Fulks
Mr. and Mrs. James Geller
Mr. and Mrs. Robert Gordon
Mr. and Mrs. Daniel Gorski
Judge and Mrs. Joseph M. Houser
Ms. Mary Elizabeth Huesken
Mr. and Mrs. Gregory Krieger
Mr. John P. Landers
Mr. Michael Anthony Larocca
Mr. Charles H. Lehwald
Mahoning, Trumbull, and
Columbiana Counties Funeral
Directors Association
Ms. Margaret Micco
Mr. and Mrs. David Najdusak
Mr. and Mrs. Daniel O'Bruba
Ms. Kimberly S. Poma
Mr. and Mrs. Lee Radler
Ms. Jill Ridinger
Mr. and Mrs. Gerald Roach
Mr. and Mrs. John Schick
Mr. and Mrs. Clarence Smith
Mr. Ed Strauss
Mr. and Mrs. William Terlesky
Mr. and Mrs. Joseph Thomas
Ms. Ashley Warne
Mr. and Mrs. R. Lee Zabel

Fund for our Economic Future

Community Foundation of the
Mahoning Valley
Community Foundation of Western
Pennsylvania & Eastern Ohio
Trumbull 100

JL Francis Fund for ALS Research Scholarship Fund

ALS Care Project
Angott Search Group
Mr. and Mrs. Timothy B. Atkinson
Ms. Debra A. Bish
Mr. Gary Bitonte
Mr. and Mrs. Albert P. Blank
Mr. and Mrs. Douglas A. Brady
Mr. Richard S. Bunyoff
Burgan Real Estate LTD

Mr. and Mrs. Donald Cagigas
Mr. and Mrs. Craig Carr
Mr. and Mrs. Patrick F. Casey
Cohen & Company
Mr. and Mrs. Mark J. D'Andrea
Mr. John DiVitto
First Place Bank
First Place Community Foundation
First Place Insurance Agency, Ltd.
Mr. and Mrs. David W. Gifford
Mr. and Mrs. Robert P. Grace
Greenheart Companies
Mr. and Mrs. William D. Harrell
Ms. Joanne Harrold
Mr. and Mrs. William F. Hickey
Mr. and Mrs. David S. Hinkle
Mr. and Mrs. Brian E. Hoopes
Mr. Jack C. Hutchinson
Insurance Claim Adjusters Inc.
Katie's Korner
Mr. Sean M. Keane
Mr. Robert H. Kempe
Mr. Donald J. Kniska
Mr. and Mrs. Robert J. Kowalski
Mr. and Mrs. Darrin L. Kresevic
L.E. Roberts Consulting
Mr. and Mrs. Robert R. Lewis
Mr. and Mrs. Steven Lewis
Mr. and Mrs. Richard R. Lytle
Mr. and Mrs. Mark S. Makoski
Mr. Nicholas M. Manos
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Mr. and Mrs. John Nittoli
Ohio Secure Shred LLC
Packer Thomas
Mr. Scott L. Parker
Atty. Terry Patrick
Mr. and Mrs. Richard M. Pavlock
Payroll Pros, LLC
Power Cleaning and Maintenance, Inc.
Professional Real Estate
Appraisers
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Mr. and Mrs. Larry E. Roberts
Mr. and Mrs. E. Jeffrey Rossi
Mr. and Mrs. Samuel A. Roth
Rukh Boardman Properties, LLC
Mr. and Mrs. William A. Russell
Congressman Tim Ryan
Sales Consultants of Broadview
Heights
Sandy's Tire Sales, Inc.
Mr. and Mrs. Todd R. Sardich
Mr. Christopher Sause
Mr. and Mrs. Anthony R. Schiavone
Ms. Kathy A. Shaw
Dr. and Mrs. Thomas A. Shipka
Silver, Freedman & Taft, L.L.P.
Mr. John P. Soukenik
Mrs. Danielle Stanley

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Mr. and Mrs. Kenton Thompson
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Mr. and Mrs. Ronald P. Volpe
Mr. and Ms. Mark E. Wadman
Mr. D. Craig Warden
Mr. and Mrs. J. Patrick Was
Youngstown State University
ZID Realty and Associates

The William and Arden Farragher Endowment Fund for Help Hotline Crisis Center, Inc.

Mr. William E. Farragher
Help Hotline Crisis Center, Inc.
Mr. Kenneth M. Tkatch

Junior League of Mahoning Valley Endowment Fund

Robert W. Baird & Company, Inc.
Mr. and Mrs. William A. Russell

Meridian Services Endowment Fund

Ms. Eleanor Katz

Poland Village Gardeners Fund

Mr. Paul Williams

Potential Development Program Endowment Fund

Potential Development Program Staff

Youngstown CityScape Fund

1301 Saw Mill Run Properties LLC
John & Doris Andrews Estate
Atway & Cochran, LLC
Ms. Suzanne Barbati
Ms. Nancy M. Brett
Brix Tech Services, Inc.
Ms. Holly Burnett-Hanley
Mr. Jeff Byce
Mr. and Mrs. Joseph Calabria III
Mr. and Mrs. Thomas J. Carney
Carney-McNicholas, Inc.
Mr. and Mrs. Joseph F. Caruso
Committee to Elect Gillam
Committee to Elect Rimeido Rigetti
Community Corrections
Association, Inc.
DiRusso's Sausage, Inc.
First National Bank of Pennsylvania
Atty. and Mrs. Al Fleming
Friends of Joe Schiavoni for
State Senate
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Humility of Mary Health Partners
Development Foundation
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Ms. Rochelle Landy
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Mr. and Mrs. John A. McNally

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Mr. and Mrs. Leonard N. Pinkard
R Scott Krichbaum Campaign
Account for Judge
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Lodge LPA
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Sammarone for President of Council
Mr. Scott Schulick
Mr. John B. Slanina
St. Patrick Church
Strollo Architects
Turning Technologies, LLC
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Mr. and Mrs. Jason T. Whitehead
Mr. Daniel R. Yemma
The Youngstown Foundation
Youngstown State University

Jeffrey M. Stevens Memorial Fund

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Mr. Theodore J. Alexander
All Ohio Title & Escrow LLC
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Mr. Frank Ambrosia
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Mr. and Mrs. James Beil
Mr. and Mrs. Fred T. Bentfeld
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Bochert Bros. Painting &
Decorating Company
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Mr. and Mrs. Keith Brandt
Mr. and Mrs. Joseph A. Briganti Jr.
Mr. and Mrs. Raymond J. Briya
Mr. and Mrs. James Brozik
Ms. Sheryl L. Bueno
The Cafaro Foundation
Caffe Capri
Mr. and Mrs. Gregory Carney
Mr. and Mrs. Thomas J. Carney
Mr. and Mrs. Thomas J. Case
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Mr. Dennis L. Chaberd
Chase Agency, Inc.
Mr. Ron Cianciola
Mr. and Mrs. Sam J. Ciminero
Comp One LTD

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Mr. and Mrs. Donald C. Cramb
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Mr. and Mrs. Leonard S. DePinto
Ms. Barbara DePizzo
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Mr. and Mrs. Robert DeVicchio
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Mr. and Mrs. William G. Dornan Jr.
Mr. and Mrs. Keith E. Downard
Dr. Dominic and Helen Bitonte
Family Foundation
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Atty. Charles E. Dunlap
Ms. Rosemary Durkin
Mr. and Mrs. Gary R. Ferrando
Mr. and Mrs. Louis T. Ferrara
Ms. Susan Filipovich
Mr. and Mrs. James R. Fisher Jr.
FMB & Associates, LLC II
Mr. and Mrs. Angelo J. Ford
Mr. Jeffrey J. Forman
Mr. and Mrs. James P. Fox
Mr. and Mrs. Frederick H. Frank
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State Senate
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Mr. and Mrs. Anthony M. Galose
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Mr. and Mrs. James Gerlach
Mr. and Mrs. Antonio Gestosani
Mr. and Mrs. Michael Giuliani
Mr. Martin S. Goldberg
Mr. John F. Gordon
Mr. and Mrs. James R. Grace
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Mr. and Mrs. Melvin R. Haught
Mr. Remon Hayer
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Mr. and Mrs. Robert L. Heller
Mr. and Mrs. Lawrence M. Herock
Mr. William P. Hewitt Jr.
Judge and Mrs. Joseph M. Houser
Mr. and Mrs. Max L. Howells
Mr. Joseph A. Ignazio Sr
Suzanne and Al Fleming Family Fund
Ms. Iris N. Irwin
J.C. Enterprise Center Inc.
Mr. and Mrs. Dennis J. Johnson
Ms. Monica L. Kalansky
Mr. James M. Keating
Mr. and Mrs. David Kemble
Mr. David M. Kennedy
Kiefer Financial Services
Mr. and Mrs. Roger A. King
Mr. and Mrs. James A. Kiracofe

Mr. and Mrs. Ronald S. Kreps
Mr. Edward Kresovsky
Mr. John Kresovsky
Atty. and Mrs. Alan R. Kretzer
Mr. and Mrs. John Krompegel
Mr. and Mrs. Robert G. Kroner
Mr. and Mrs. Richard L. Kubiak
Atty. and Mrs. Richard J. Lacivita
Mr. James E. Lang
Mr. and Mrs. Robert Latona
Mr. and Mrs. James P. LaVorini
Mr. and Mrs. Donald F. Lepore
Lewis Development Corp.
Mr. and Mrs. Ralph Logozzo
Mr. Richard R. Lucarell
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Mr. and Mrs. John J. Maluso
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The Cafaro Foundation
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West Warren Industrial Partnership Fund

The Marvin Group, Inc.
The Raymond John Wean Foundation
RMS

CFMV Woman's Fund

Ms. Barbara Arnstutz
Ms. Lark Dickstein

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Foundation
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Youngstown Business Incubator
The Youngstown Foundation
Youngstown State University

In Kind Support

Ohio One Corporation
TechnaGroup
Valley Electrical Consolidated, Inc.
Youngstown Warren Regional
Chamber

Boardman Schools

The Boardman Schools Fund for Educational Excellence — Our Students. Our Future.

In 2009, with the cost of education soaring and state funding being dramatically reduced, a group of dedicated people began looking at creative ways to provide their local teachers with the tools to enrich the learning experience for students. Out of these meetings the Boardman Schools Fund for Educational Excellence (BSFEE) was born. The Fund, which was newly created in 2009, has experienced tremendous growth this past year thanks to the hard work and dedication of the Fund's Board of Trustees and donors who decided to be proactive in helping their students succeed.

The Boardman Schools Fund provides support for projects that further student educational experiences. Specifically the Fund has an interest in funding projects which help students develop their talents and interests through the creation of an environment which nurtures high achievement and educational excellence. For more information about the fund or to make a contribution, please visit our website at www.cfmv.org or the Boardman Schools Fund for Educational Excellence site at www.boardmanschoolsfund.org.



“Our one and only goal: to help grant our students every possible advantage, to become all they can be, for they are our future.”

— Gwen Smith-Darnell



The BSFEE Board of Trustees and the five inaugural recipients of the Teacher Mini-Grants program.

2010 -2011 Board of Trustees:

Judge Mark Belinky
Dr. Robert DeMarco
Sidney Jones
Connie Knecht
Frank Lazzeri
Joyce Mistovich
Rick Schafer
Gwen Smith-Darnell

*Mahoning County Probate Court
Boardman Board of Education
1st VP, Merrill Lynch
Community Volunteer
Boardman Schools Superintendent
Boardman Schools Educator
Principal, Packer Thomas
Boardman News*

Focusing on the 3 A's of Excellence:

ACADEMICS
ARTS
ATHLETICS

Types of Funds

The Foundation houses the following permanent donor funds and is proud to represent our donors.

DONOR ADVISED FUNDS

enable donors to recommend specific organizations to receive grants.

- John S. and Doris M. Andrews Memorial Fund
- Nancy W. and Bruce R. Beeghly Family Fund
- DA Fund (Anonymous Donor)
- Albin P. and Jean L. Dearing Fund
- Suzanne and Al Fleming Family Fund
- David A. and Janet L. Flynn Family Fund
- Huntington Bank Fund
- JL Francis Fund for ALS Research and Support
- Jeffrey M. Stevens Memorial Fund
- Kennedy Family Fund
- Knecht Family Fund
- Mayor's Community Fund
- McAuley Family Fund
- Paul and Barbara Powers Charitable Remainder Trust
- Ricchiuti Family Fund
- E. Jeffrey and Carol A. Rossi Family Fund
- J. David and Madelon Sabine Family Fund
- SJK Charitable Fund
- Stephen Moore Memorial Fund
- John and Denise York Fund

DESIGNATED AND PASS-THROUGH FUNDS

support specific organizations. The Foundation's Board of Directors insures that grants to these groups remain relevant over time and responsive to changing circumstances.

- Abe and Leona M. Adler Literary Fund
- Access Health Mahoning Valley*
- A.L. Brooks and W.E. Bliss Funds*
- Boardman Township Park 60th Anniversary Capital Campaign Fund
- Poland Village Gardeners Centennial Gardens Fund
- Tech Belt Energy Innovation Center Fund*
- Robert Tornello Endowment Fund
- Lt. J. G. Douglas M. Webster Memorial Fund
- West Warren Industrial Partnership Fund*
- Youngstown Early College

SCHOLARSHIP FUNDS

help students pursue academic goals.

- Athena Scholarship Fund
- C.M. (Jerry) Collins Memorial Scholarship Fund
- The Al and Helen Davis Memorial Scholarship Fund*

- Gail T. Dennison Mahoning County Saddle Horse Committee Scholarship Fund
- George L. Madigan Scholarship Fund
- Meridian Community Care Scholarship Fund*

UNRESTRICTED FUNDS AND FIELD OF INTEREST FUNDS

allow grants to be made to wherever our Board of Directors determines our community's needs to be the greatest. Board of Directors assumes the oversight responsibility for ensuring that the Field of Interest funds are distributed in accordance with the statement of purpose, and has full discretion in grantmaking.

- Community Foundation of the Mahoning Valley Grantmaking Fund
- Community Foundation of the Mahoning Valley Women's Fund
- The Delfin Gibert Fund for Disadvantaged Children and Youth*
- Young Philanthropist Fund

ORGANIZATIONALLY ADVISED FUNDS

allow organizations to make recommendations on which charitable causes should be supported each year and can

Establishing a New Fund

By setting up a fund with the Community Foundation of the Mahoning Valley you receive the flexibility and involvement of your own private foundation with the tax advantages and simplicity of a community foundation. Contact us at 330.743.5555 to create your fund today.

provide a way to communicate the organization's charitable values.

- Better Business Bureau Charitable Fund*
- Boardman Schools Fund for Educational Excellence
- Boardman Fund
- The International Institute Fund*
- Fund for Youngstown City Schools Foundation

* Denotes funds established during the fiscal year ending June 30, 2011. Fund balances are not reflected in the June 30, 2010 Financial Statement.

Agency Partners & History

AGENCY PARTNERS

The Community Foundation of the Mahoning Valley works closely with the nonprofit community on many levels. We act as a liaison between the agencies and our donors and provide grants for the agencies to maintain their critical services. We further our knowledge of current and evolving needs of the community through our interaction with agency directors, and work to raise awareness across the community and with other charitable foundations.

Agency Endowment Funds are established by nonprofits to provide an additional source of income to them. The Foundation handles all administrative and investment responsibilities for the organizations, allowing them to pursue their charitable missions.



CREDIT: iStockphoto

» “Meridian Community Care’s endowment funds with the Community Foundation of the Mahoning Valley are an integral part of our future in this area. The funding for treatment of addiction is always changing, and we cannot simply rely on government funding for the future of this important need in our community. CFMV has worked with us at Meridian to build our endowment funds, which will allow us the stability to serve more people in the future, while also supporting prevention programs that seek to reduce the number of individuals needing addiction treatment. By helping us build our endowments, they have simultaneously taken on our core mission — which is to save lives and serve communities.”

— *Larry Moliterno, President and CEO, Meridian Community Care*



OUR AGENCY ENDOWMENT PARTNERS ARE:

Angels for Animals Endowment Fund

Association of Fundraising Professionals
Mahoning/Shenango Chapter Fund

Beatitude House Fund

Big Reach Center for Hope Fund

Doris Burdman Fund for Mental Health

Community Living Fund

D & E Counseling Center Fund

Easter Seals Building Tomorrows Fund

Eastern Ohio Area Health Education Center Fund

The William and Arden Farragher Fund for
Help Hotline Crisis Center, Inc.

Interfaith Home Maintenance Service Fund

Junior Achievement of Mahoning Valley Fund

Junior League of Youngstown Fund

Kiwanis Club of Youngstown Fund

Leadership Mahoning Valley Fund

Mahoning County Saddle Horse 4H
Committee Fund

W. Fenton Meredith Memorial Fund,
FBO St. James Meeting House

Meridian Community Care Fund

Millcreek Children's Center Fund

Ohio North East Health Systems Fund

Potential Development Fund

Second Harvest Food Bank of the
Mahoning Valley Fund

Sojourner House Domestic Violence
Program Fund

Someplace Safe Fund

Youngstown Area Goodwill Industries Fund

Youngstown CityScape Fund

Youngstown Hearing and Speech Center Fund

Youngstown/Warren Regional Chamber Fund

Charitable organizations are discovering the need to establish stable, predictable sources of income. Just when a charitable organization is needed most by the community, funds are become difficult to obtain. Establishing a permanent endowment fund for a charitable organization can provide a reliable source of additional income each year. Some additional benefits are:

- **Relief from the administrative burden of managing an endowment – all accounting, reporting and gift acknowledgements are handled by the Foundation;**
- **Reduced risk thanks to the Community Foundation's diversification of assets and oversight responsibility;**
- **The confidence that comes from our professional administration and financial management; and**
- **The ability to structure, accept and manage complicated charitable gifts.**



Legacy: Connie Knecht

MENTION THE NAME CONNIE KNECHT, and you will get a heartfelt response from the listener - "An absolute powerhouse of energy; A truly amazing individual; A rare community gem" just to mention a few. With her ever present smile, Connie's energy is contagious - and effective - in garnering support for her favorite causes. "It is both a privilege and a responsibility to contribute back the community you live in." states Connie. Connie and her late husband Bill felt strongly about teaching their children to give back knowing the best way to learn is by example. Looking back, Connie said neither of their parents ever formally taught them about philanthropy. "We learned by observing our parents, and our children learned by watching us, that it is accepted and expected that people give back to their communities - it became part of our heritage." A self-described professional community volunteer, Connie has been actively involved in advocating for various organizations that she feels passionate about.

On the Youngstown State University campus you will see many reminders of the Knecht family legacy, from the Bill Knecht Amphitheatre, to the wall of Past Trustees where Bill's name is inscribed, to the statue of a beautiful penguin that shines in the afternoon sun. The penguin, YSU's mascot, was the result of a collaborative effort between

the Community Foundation and YSU a few years back. Local artists used a wide variety of mediums to turn 31, 7-foot tall fiberglass penguins into works of art. They were then auctioned off with the proceeds going to various community organizations. "The Penguin Parade was so exciting - it tied two of my passions together, YSU and The Community Foundation of the Mahoning Valley."

Connie lights up when she talks about her experience with the Community Foundation. "The Foundation is so important because they gather the information for their donors who aren't as knowledgeable. We know we can trust their advice - that the organizations are authentic, valid, and ethical." Something she finds very important in today's society where donors can feel overwhelmed by the number of charitable options that are available.

"The work the CFMV does in the community is exceptional - the absolute highest quality. From the outreach the Foundation has done with educating our local youth about the importance of philanthropy, to the total concept of what the Foundations needs to be - beyond the getting and giving of money - the Community Foundation is the standard."

And coming from Mrs. F.W. Knecht who is one of the Mahoning Valley's gems, that is high praise indeed.

CREDIT: Bruce W. Palmer, Photographer, Youngstown State University Marketing/Communications



Legacy Giving

WE WOULD LIKE TO THANK ALL OF THE DONORS WHO HAVE REMEMBERED THE FOUNDATION IN THEIR ESTATE PLANNING.

LEGACY SOCIETY

The Community Foundation of the Mahoning Valley created our Legacy Society to acknowledge and thank special donors who have chosen to provide for the future of our community through planned gifts made to us from their estate. If you decide to leave us a planned gift, please let us know. We want to make sure we have your wishes on record to ensure that your intentions are followed in perpetuity.

TYPES OF PLANNED GIVING

Including The Community Foundation of the Mahoning Valley in your will helps you create a legacy for future generations. Planning today can help those in the future have the quality of life we would all treasure. Please contact the Foundation at 330.743.5555 or your Professional Advisor to hear the different options for planned gifts.



LEAVE A LEGACY®

The Community Foundation of the Mahoning Valley is a proud partner of the LEAVE A LEGACY® program, through the Mahoning/Shenango Planned Giving Council. This program is a public awareness campaign designed to inspire people just like you to make a charitable bequest. Bequests are just one type of “planned gift” (a gift that will be distributed sometime in the future) that can be made to the organization(s) you value. The LEAVE A LEGACY® program activities are conducted locally by volunteers who are committed to promoting the importance of charitable bequests.

All types of nonprofit groups, including social service and arts organizations, churches, hospitals and educational institutions participate in the LEAVE A LEGACY® program. These partners help promote the message that people from all walks of life can “make a difference in the lives that follow” through a charitable bequest. The program does NOT solicit gifts for any particular organization. You are encouraged to make a charitable bequest to the organization(s) that you deem deserving of your support.



CREDIT: iStockphoto

Professional Advisors

Professional advisors have played a key role in increasing the Mahoning Valley's philanthropic resources by working with clients to achieve their charitable goals. Encouraging philanthropy benefits advisors by **fostering goodwill and adding value to client relationships**. Clients who become donors realize a variety of benefits which may include tax savings, peace of mind and the satisfaction of supporting their favorite charitable cause. The community benefits as a whole through the strength of the advisor/client/philanthropist relationship.

Client Benefit

The Community Foundation provides numerous advantages to your clients, including real ways for them to stay engaged in giving while avoiding many of the hassles of private foundation management. Because The Community Foundation is a 501(c) 3 public charity, donors receive the most valuable tax benefits available under law for their charitable contributions—for both income and estate tax purposes.

We welcome the opportunity to consult with you and any clients who would like to discuss their charitable planning options. Our desire is to help you find the solution that works best for your client.

To learn more about the valuable benefits available to your clients,
PLEASE CONTACT
THE FOUNDATION
AT 330.743.5555.

» “I have had the pleasure of working with the Community Foundation in assisting clients establish funds to meet needed philanthropic objectives and in the creation of a community fund for the benefit of Boardman Township. In every experience, the Community Foundation through its dedicated community minded staff and Board have been extremely helpful and provided needed guidance. The Community Foundation works to create and grow endowments to not only benefit our community in the future, but to also make a positive difference today. It is truly a community jewel!”

— James M. Rosa, CPA, PFS, Principal, Hill, Barth & King LLC



Benefits & How to Contribute

A contribution to the Foundation provides a variety of benefits to donors, whatever the philanthropic objective. By giving through the Foundation your generosity will allow us to target specific needs within the community.

The Foundation's stewardship ensures that your charitable intentions are met and administered according to your wishes, for generations to come, even when community needs and organizations change. Our professional staff will help define your preferences. Grant administration is provided and grant applicants are identified, investigated and monitored ensuring compliance with donor intent.

The Foundation will work with your investment advisor, tax advisor and attorney to ensure that investments are managed well, complying with all applicable law. You also receive favorable treatment of cash gifts, favorable treatment of closely held stock or real estate with no excise tax.



Confirmed in compliance with National Standards for U.S. Community Foundations. This designation places us in the top philanthropic tier nationally.

There are three easy ways to give through the Community Foundation:

1. Donate online
(credit card)
www.cfmv.org

2. Donate by phone
(wire transfers, gifts of stock)
330.743.5555

3. Donate by mail
(check or money order)
Simply fill out the envelope included in this report and return with your check now, or ask to be invoiced.

Please contact the Foundation office with any questions, and as always, please consult your Professional Advisor.

FOCUS ON YOUTH P



Young Philanthropist Fund Board of Directors 2011 – 2012 from left to right: Nayef Zarrou, Dave Pavlich, Megan Kerrigan, JD Kubacki, Trinette Simon, Michael Masucci, Laura McCaskey, Alyssa Schor, Lily Aey, Lilly Hetson

Young Philanthropist Fund

The Young Philanthropist Fund: Involving the future leaders of the community in philanthropic endeavors through education, mentoring and decision making.

The goal is to introduce our younger generation to the role of philanthropy and the fine efforts of our nonprofit community, while preparing them for their future role as our Valley's philanthropists.

The Young Philanthropist Fund will award grants to our area nonprofits on the recommendations of board members in partnership with the Foundation. The YPF board goes through the entire grantmaking process: setting distribution goals, calling for applications, reviewing requests, site-visits and recommendation of grants to be awarded. Now in its fifth year of operating, the YPF has distributed nearly \$10,000 in grants to youth focused projects in Mahoning and Trumbull counties.

PHILANTHROPY

» “It is truly an honor to be a part of the Young Philanthropist Fund. I have made connections with professionals from the area, gained hope for children living in the valley, and learned the process and difficulties of a non-profit organization. Through the Young Philanthropist Fund, I have met local professionals from numerous backgrounds and owners of businesses whom I plan to keep in contact with for years to come. The feeling of accomplishment knowing we are making a difference in the lives of the people in our community is incomparable to any other volunteerism. The board members of this foundation serve as mentors and have been immensely supportive and helpful to anyone who crosses their paths.”



— *Jascelynn Romeo,*
YPF Board Member

“GIVE ME A
PLACE TO
STAND AND
I WILL MOVE
THE EARTH.”

— ARCHIMEDES

2010 – 2011 Young Philanthropist Advisory Board

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Youngstown State University

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Mahoning Valley
Young Professionals

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Financial Statement

ASSETS	2011	2010
Operating cash	\$52,060	\$48,507
Investments at fair value:		
Cash and short-term investments	751,724	965,595
Mutual funds	3,782,223	5,521,561
Common stock	3,689,098	1,304,865
Bonds	2,662,243	1,514,459
TOTAL INVESTMENTS	11,235,288	9,306,480
Property and Equipment:		
Office furniture and equipment	20,409	11,526
Leasehold improvements	0	5,500
	20,409	17,026
Less accumulated depreciation	1,071	8,491
NET PROPERTY AND EQUIPMENT	19,338	8,535
TOTAL ASSETS	11,306,686	9,363,522
LIABILITIES		
Agency funds	2,767,290	2,239,695
Payroll taxes withheld	389	651
TOTAL LIABILITIES	2,767,679	2,240,346
NET ASSETS		
Unrestricted	7,635,220	6,225,100
Temporarily restricted	738,615	732,904
Permanently restricted	165,172	165,172
TOTAL NET ASSETS	8,539,007	7,123,176
TOTAL LIABILITIES AND NET ASSETS	11,306,686	9,363,522
CHANGES IN UNRESTRICTED NET ASSETS		
Revenues and gains (losses):		
Public support	1,363,025	212,931
Fundraising event revenue, net of expenses of \$4,287 for 2011 and \$4,896 for 2010	14,688	12,848
Interest and dividend income collected	127,720	172,716
Net unrealized and realized gains (losses) on investments	804,825	513,089
Administrative fees	22,116	13,456
	2,332,374	925,040
Net assets released from restrictions	643,852	109,469
TOTAL UNRESTRICTED REVENUES AND GAINS (LOSSES)	2,976,226	1,034,509
Expenses paid:		
Charitable grants	1,291,526	810,357
Operating expenses	247,345	181,565
TOTAL EXPENSES PAID	1,538,871	991,922
Loss on Disposal of Assets	(6,485)	0
Transfers to temporarily restricted asset	(20,750)	(43,262)
INCREASE (DECREASE) IN UNRESTRICTED NET ASSETS	1,410,120	(675)
CHANGES IN TEMPORARILY RESTRICTED NET ASSETS		
Revenues and gains:		
Public support	558,070	172,702
Fundraising event revenue, net of expenses of \$24,778 for 2011 \$23,618 for 2010	4,604	5,095
Interest and dividend income collected	8,553	11,082
Net unrealized and realized gains (losses) on investments	57,586	51,250
TOTAL TEMPORARILY RESTRICTED REVENUES AND GAINS	628,813	240,129
Net assets released from restrictions	(643,852)	(109,469)
	(15,039)	130,660
Transfers from unrestricted assets	20,750	43,262
INCREASE IN TEMPORARILY RESTRICTED NET ASSETS	5,711	173,922
INCREASE (DECREASE) IN NET ASSETS	1,415,831	173,247
NET ASSETS		
BEGINNING OF YEAR	7,123,176	6,949,929
END OF YEAR	8,539,007	7,123,176

The financial statements of the Foundation are audited annually by Hill, Barth, and King LLC. The full audit and most recently filed IRS form 990 are available for public inspection at the Foundation office during regular business hours. If a 990T is filed, it will also be available.

Supporting Organizations are designated by the IRS as organizations that support the grantmaking activities of community foundations.

CFMV Supporting Organization Assets: **\$6,824,747** *unaudited