



UPPER ARLINGTON  
COMMUNITY  
FOUNDATION

*Inspire • Engage • Create*

UPPER  
ARLINGTON  
FOUNDED 1918

# SPECIAL IMPACT REPORT

May 2022

# LETTER FROM THE CHAIR

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It is a pleasure to serve our community as chair of the Upper Arlington Community Foundation (UACF) Board of Trustees. Together with you, the Foundation continues to make an impact in our community through philanthropy.

The Upper Arlington Community Foundation enhances life in UA through collaborative relationships that support a range of worthy programs and initiatives. It is our role to connect community members to community needs through philanthropy. Thank you for ensuring this important work continues. Your support for the Foundation enables us to address our community's greatest needs. With your help, we are grantor and partner to important initiatives including enhancements to our libraries, beautification of our parks and facilities, celebrations of time-honored traditions, and providing assistance and access to residents struggling with life's newest challenges.

It is with great pride that we embark on one of our greatest legacies to date, partnering with the City of UA to bring residents a long-awaited Community Center. **Together...community starts here.**

In this impact report, we share with you our latest news and impact in the UA community.

Wishing you and yours health, happiness, and community.

Sincerely,

A handwritten signature in black ink, appearing to read 'Mike Fitzpatrick'.

**Mike Fitzpatrick**  
Chair, Board of Trustees

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## UPPER ARLINGTON COMMUNITY FOUNDATION BOARD OF TRUSTEES

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Mike Fitzpatrick, Chair | Michael Martz, 1st Vice Chair | Ann Gabriel, Treasurer | Catherine Strauss, Secretary |  
Margie Pizzuti, Immediate Past Chair | Jeffrey Backes, M.D. | Yanitza Brongers-Marrero | Robert Dunn\* |  
Wendy Gomez | Jennifer Griffith\* | W. Gregory Guy | Brian Hall | Clayton Hall | Jodi Patton\* | Mark Ricketts |  
Laure Schoedinger\* | Catherine Strauss | Lori Wengerd | \*in leadership transition as of May 10, 2022

# WELCOME: JESSICA GRISEZ, EXECUTIVE DIRECTOR



The Upper Arlington Community Foundation has a new leader. Jessica Grisez joined the UACF as Executive Director in April. She is tasked with advancing the Foundation in partnership with the Board of Directors, community partners, and Upper Arlington residents.

She is experienced with large and small nonprofit organizations in the fields of higher education, healthcare, and social services. She joins UACF from JewishColumbus, a local community foundation, where she led gift planning and served as philanthropic advisor to fund holders and community members.

Prior to this, she was with The Ohio State University College of Medicine Advancement office from 2013 through 2019. Before relocating to Columbus in 2013, Jessica began her nonprofit career in Washington, DC, where she worked for the Epilepsy Foundation, Children's Law Center, and Rape, Abuse, and Incest National Network (RAINN). She is a Certified Fund Raising Executive and Chartered Advisor in Philanthropy. Jessica is a graduate of the University of South Carolina with a BA in journalism and mass communications.

"It is a pleasure to join the Foundation and help enhance our community through philanthropy. As a community foundation, we have a unique opportunity to convene UA residents, inspire charitable initiatives, and make a lasting impact in our own backyard, today and for future generations," shares Jessica.

Jessica and her husband, Casey, reside in Upper Arlington and are parents to twin toddlers, Fitz and Lou. She looks forward to hearing from you! Contact Jessica at [Jessica@uacommunityfoundation.com](mailto:Jessica@uacommunityfoundation.com), 614-451-0700.

## BOARD TRANSITIONS

The Upper Arlington Community Foundation proudly serves the community with volunteer leaders who contribute time, talent, and treasure to the mission of UACF.

In gratitude for their service, outgoing Board of Trustees members: **Robert Dunn**, Bailey Cavalieri, 2016-2022, and **Jodi Patton**, Yoga Instructor & Reiki Master, 2016-2022.

The Foundation celebrates the leadership of Bob and Jodi and the passion, commitment, and leadership they shared with the community during their board terms.

### Welcome, new Board of Trustees members:

**Jennifer Griffith**,  
First Merchants Bank

**Laure Schoedinger**,  
LBME Consulting



# OUR IMPACT

As a local community foundation, UACF utilizes general operating support to make philanthropic grants to important community projects, programs, and initiatives. The Foundation is proud to have supported the following projects in 2022:



## UA PUBLIC LIBRARY, LANE ROAD BRANCH, EARLY LEARNING PLAY AREA

**IMPACT GRANT: \$20,000**

This lead grant enables the UA Public Library to welcome a second Early Learning Play Area in UA. This is an enhancement to an existing library space on Lane Road and expands its mission of play-based learning. The Lane Road branch is the second-busiest UA Library. This space will engage children in their social and emotional development through peer interactions as well as create opportunities for children and families to establish new connections within their community.

## UPPER ARLINGTON SAFETY TOWN

**IMPACT GRANT: \$12,000**

Safety Town is a one-week summer preschool where children learn about all aspects of child safety, sponsored by the Upper Arlington Police Division. Children attend each year to learn to make wise decisions in potentially dangerous situations and emergencies. Students learn pedestrian and traffic safety by tricycling about a miniature village complete with streets, sidewalks, buildings, stop signs, and a working traffic signal. This grant enables the City of Upper Arlington to expand sidewalks at Safety Town to better teach participants about crosswalk safety.



# OUR IMPACT

## CONGRATS TO KNELL FAMILY BASKETBALL SCHOLARSHIP RECIPIENT ALYSSA GEST

The Upper Arlington Community Foundation is proud to award the 2022 Knell Family Basketball Scholarship to UAHS senior Alyssa Gest, Golden Bear Girls Basketball #21. The Foundation wishes her well at Kenyon College.

Sue Knell was a lifelong UA resident. An UAHS graduate, she later played collegiate basketball at Colorado Women's College, an all-women's college now associated with Denver University. Her legacy is remembered in celebration of one annual UAHS Girls Basketball Senior.



DO YOU KNOW AN ORGANIZATION SEEKING PHILANTHROPIC FUNDS?  
ENCOURAGE THEM TO APPLY FOR A UACF GRANT AT:

[www.uacommunityfoundation.com](http://www.uacommunityfoundation.com)

“ I am extremely honored to be awarded this scholarship. I hope I continue to represent Sue Knell and her family well at Kenyon. ”

ALYSSA GEST

# UA COMMUNITY CENTER CAMPAIGN PROGRESS

The UACF is proud to partner with the City of UA to bring residents a long-awaited community center. The Foundation, led by the UA Community Center Capital Campaign, is tasked with securing \$8M in private funds to support this exciting project. Thanks to the generosity of a few early funders, the Campaign Committee has made great progress.

“For years, Upper Arlington has needed a space for residents of all ages to gather,” shared Bill Hosket, Campaign Committee honorary co-chair. “We’ve waited so long for this moment in our UA history. We owe it to our residents to have the best Community Center for everyone. My son, Brad, and I are delighted to serve as honorary co-chairs, and we are confident our community can help us reach our goal.”



VISIT [WWW.TOGETHERUA.ORG](http://WWW.TOGETHERUA.ORG) TO FOLLOW PROGRESS.

**And what a gathering space it will be!** Amenities for this intergenerational gathering place will include an indoor pool, multipurpose event space, locker rooms, fitness/exercise spaces, three gymnasiums (one multipurpose), children’s play area, teen space, childcare, walking/running track, senior programming, shared classrooms, event hall/meeting space, and an outdoor multipurpose terrace.

**Together...community starts here!** Save the date and double your impact! Gifts up to \$1,000 will be matched up to \$250,000 between June 1, 2022, and December 31, 2022.

**QUESTIONS? CONTACT JESSICA GRISEZ.**

**UPPER ARLINGTON  
COMMUNITY CENTER  
CAPITAL CAMPAIGN  
COMMITTEE**

Wendy and Kate Gomez, Honorary Co-Chairs | Bill and Brad Hosket, Honorary Co-Chairs | Marissa and Jeff Backes, M.D. | Greg Comfort | Jamie Crane and Tim Miller | Lisa Ingram and Greg Guy | Mary Ann Krauss | Michael Martz | Emily and John Ness | Carolyn and Andrew Weeks | Steve Schoeny, UA City Manager, Ex Officio | Brendan King, UA City Council President, Ex Officio | Margie Pizzuti, Co-Chair | Mike Fitzpatrick, Co-Chair



UPPER ARLINGTON  
COMMUNITY FOUNDATION  
GOOD NEIGHBOR FUND

## **GOOD NEIGHBOR FUND WELCOMES NEW ADVOCATE PARTNER**

The Good Neighbor Fund was established in 2017 to help Upper Arlington residents who have a unique, unforeseen event happen in their lives that threatens their stability. The fund provides one-time-only emergency grants in times of need.

Referrals to the fund are made by the fund's official Advocate Partners, who identify community members with great need in an emergency. The Foundation is proud to welcome a new partner, UA City Schools. This collaboration further builds a safety net around UA families, supporting them in their hardest times.

"The UACF mission and purpose is unbelievable, and our community is fortunate to have the

Good Neighbor Fund. This will be a wonderful partnership," says Sam Belk, assistant principal, Upper Arlington High School.

Additional Advocate Partners include UA Commission on Aging, UA Fire, and UA Police.

Since its start, the GNF has granted nearly \$80,000 to help residents with living expenses, medical bills, transportation assistance, and home safety repairs. In 2020, the fund included small business grants to support local UA businesses impacted by the COVID-19 pandemic.

The GNF committee is chaired by board member Jodi Patton.

**CONSIDER SUPPORTING THE GNF ONLINE AT:**

**[www.uacommunityfoundation.com](http://www.uacommunityfoundation.com)**

## REMEMBERING JANE DAVIS FERGER

The Upper Arlington Community Foundation celebrates the life of Jane Davis Ferger, 1931-2022. Jane was an early advocate of the Upper Arlington Community Center, and her initial contribution to fund the initiative in 2003 ultimately established the Upper Arlington Community Foundation. Though she left the UA community for sunny Key Largo, Florida, she is remembered fondly by many friends and family left behind in Upper Arlington.

“Jane’s life was a personal commitment to philanthropy. The Upper Arlington Community Foundation owes its existence to her belief that ‘something good’ would be created with her initial gift. That generous first gift continues to give by enhancing our city and serving its residents through the work of the Foundation,” says Mary Ann Krauss, UACF emeritus board member.

## ANN GABRIEL: LEGACY SOCIETY MEMBER

Ann Gabriel is an exceptional UA volunteer leader with a passion to support community today and through her legacy. A lifelong UA resident, Ann is a proud graduate of Tremont Elementary and is a Golden Bear Basketball alumna of UAHS. She sits on countless boards and is involved in endless service activities for her community. Though she spent a career at Ohio University, Upper Arlington has remained home. She has enjoyed watching it evolve, grow, and welcome the next generation. Ann is currently the UACF Board Treasurer and a member of the UA Legacy Society, ensuring the future of the Foundation with a gift in her will.

“The Foundation has always been a consistent organization in our community, supporting the greatest projects and initiatives in UA. When considering what good work organizations are doing in my community, the Foundation was a perfect addition to my estate plans,” says Ann. “I support this work today and always.”

The Foundation is committed to enhancing the UA community through philanthropy. As it helps build a future community gathering space in a new community center, it is grateful to those who are also committed to building the future of the Foundation long after they are gone.

**Have you already included the Foundation in your estate plans? Are you considering how you can plan your legacy in UA with a gift in your will, trust, retirement account, or permanent endowment? Contact Jessica Grisez, Executive Director, at [jessica@uacommunityfoundation.com](mailto:jessica@uacommunityfoundation.com), 614-451-0700, and learn how you can join the UACF Legacy Society.**







# JOIN THE UACF LEGACY SOCIETY

Each life stage offers unique philanthropic opportunities to create a lasting impact. Create your UA legacy with a gift in your will, trust, retirement account, or permanent endowment. Discuss with your professional advisor which vehicle is best for your goals.

## 40s and 50s

*How do I give when I have both kids' college tuition to worry about?*

- Appreciated securities
- Life insurance
- Retirement account beneficiary
- Bequest

## 60s and 70s

*How do I give when I'm not sure if my fixed assets and income are enough?*

- Appreciated securities
- Charitable remainder trust (CRT)
- Gifts of real estate
- Retirement account beneficiary
- Charitable gift annuity (CGA)
- Excess life insurance

## 80s and 90s

*How can I give and be remembered?*

- Bequest
- Securities
- Charitable gift annuity (CGA)
- Real estate
- Retirement assets
- Charitable remainder trust (CRT)
- Paid-up life insurance policy

## WAYS TO GIVE EXPLAINED

TYPE OF GIFT	HOW IT WORKS	BENEFITS
<b>Appreciated Securities</b>	Use appreciated stocks, bonds, or mutual funds held for more than one year to endow a fund.	<ul style="list-style-type: none"> <li>• Receive tax deduction for fair market value</li> <li>• Pay no capital gains tax</li> </ul>
<b>Gift in Will or Trust</b>	Designate an amount or percentage in your will or trust for the benefit of the organizations you love.	<ul style="list-style-type: none"> <li>• Maintain control of your assets while you are still living</li> <li>• Minimal cost</li> <li>• Estate tax deduction</li> </ul>
<b>Cash Endowment</b>	Write a check or make your gift with a credit card or appreciated securities.	<ul style="list-style-type: none"> <li>• Immediate tax deduction for full value of gift</li> </ul>
<b>Life Insurance</b>	Transfer ownership or add a beneficiary of an existing policy.	<ul style="list-style-type: none"> <li>• Charitable deduction for gifts for payment of premiums (if ownership transfer)</li> <li>• Make a larger gift than you thought possible</li> </ul>
<b>IRA Charitable Rollover</b>	Make a qualified charitable distribution, up to \$100,000.	<ul style="list-style-type: none"> <li>• Lifetime use of asset</li> <li>• Reduces taxes passed to heirs</li> </ul>
<b>Retirement Fund Beneficiary</b>	Complete a change of beneficiary form and direct future funds to the Foundation.	<ul style="list-style-type: none"> <li>• No cost involved</li> </ul>

**SAVE THE DATE: SEPTEMBER 18, 2022, HEART OF UA**

**An Upper Arlington Community Foundation Annual Gala  
(formerly Raise the Roof)  
Scioto Country Club**



**Mary Ann Krauss,  
Recipient, 2021**



**The Huffman Family,  
Recipients, 2020**

We raised the roof at Amelito Mirolo Barn, and we are raising the next at the future UA Community Center. Let's raise up one another with a community celebration!

Join us this fall for our new annual event, celebrating community, philanthropy, and the Heart of UA.

Know someone who is making an impact in our community? The Foundation is now accepting nominations for the Heart of UA Award.

This annual award recognizes the cumulative philanthropic and volunteer efforts of an individual, family, or family foundation who, over a period of five or more years, demonstrates outstanding civic and charitable responsibility and whose generosity encourages others to take philanthropic leadership roles in the community. Our inaugural recipient was the Huffman family.

Visit [www.uacommunityfoundation.com](http://www.uacommunityfoundation.com) to complete a nomination form for consideration. Questions? Contact Mikey Widner with questions at 614-451-0700, [mikey@uacommunityfoundation.com](mailto:mikey@uacommunityfoundation.com)

# **THANKS TO UACF FUND HOLDERS**

As your local Foundation, it is the UACF's role to connect community needs with community member interests. Special thanks to individual funds at the Foundation supporting philanthropic initiatives in UA.

Establish a fund today with gifts of cash, appreciated securities, or retirement assets. Contact Jessica Grisez for additional information.

**BARNEY FAMILY FUND**

**DON AND SHARON COOK FUND**

**FITZPATRICK FAMILY FUND**

**CLAYTON AND GINNY HALL FAMILY FUND**

**KNELL FAMILY MEMORIAL FUND**

**KRAUSS FAMILY FUND**

**ANN ROYCE MOORE FUND**

**LYNN AND BOB NESS FUND**

**OVERMYER HALL ASSOCIATES FUND**

**GEORGE F. RENKERT FUND**

## **THANK YOU FOR YOUR ANNUAL SUPPORT**

Thanks to the annual support of loyal and generous community members, the Upper Arlington Community Foundation enhances life in the city of Upper Arlington through collaborative relationships that support a range of worthy programs and initiatives. Consider a gift today and celebrate community!

**GIVE TODAY:**

[www.uacommunityfoundation.com/donate](http://www.uacommunityfoundation.com/donate)

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