



960 West State Street, Suite 130
Alliance, OH 44601

GreaterAllianceFoundation.org
info@GreaterAllianceFoundation.org • 330.823.8560

Greater Alliance Foundation FOR FOOD, FOR ALLIANCE, FOR EVERYONE

Together

Quarterly

Alliance for Children and Families New Agency Fund Celebrates Unique Partnership



*Shirene Starn -Tapyrik, ACF Executive Director
Gerard Mastroianni, ACF Board President*

The Alliance for Children & Families (ACF) is one of the four supporting organizations of the Alliance Community Health Foundation (ACHF). Recently, the ACHF made a \$755,000 gift to the Alliance for Children & Families to create a permanent endowment for the organization. The gift will provide additional support for ACF as they carry out their mission to empower children, individuals, and families to restore their lives to greater stability, self-sufficiency, and enhancement.

Upon receiving the funds from the Alliance Community Health Foundation, ACF partnered with the Greater Alliance Foundation and established an Agency Fund to

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Alliance for Children and Families

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manage the endowment. As a community foundation, GAF has the ability to support all our local non-profit organizations by creating an Agency Fund. Currently, a dozen local non-profits use the GAF to invest in a larger pool of assets which can lead to greater growth, greater income, and lower investment fees for the non-profit.

“The Alliance Community Health Foundation (ACHF) and GAF view homelessness as a multifaceted problem that has an impact on the overall health of many impoverished families in the Alliance community. Of particular concern are educational underachievement, unemployment, physical health, anxiety and depression, hunger and poor nutrition, and in some cases, developmental delays and behavioral issues. Other factors include inadequate shelter conditions, instability in residences and shelters, and barriers to accessing services that are available. Initiatives such as those funded by ACHF are valuable to meet the needs of homeless children and adults in Alliance. An additional benefit of their generous gift will be to invest the principal and use annual investment income for operating, maintenance and if needed, emergency expenses. Use of these funds will enhance and maintain ACF properties and programs.” – Shirene Starn-Tapyrik

“We are very thankful to the Alliance Community Health Foundation Board for their commitment and foresight in supporting the people of our community through the great work and services provided by the Alliance for Children & Families. We will do our best to invest and manage the funds entrusted to us to maximize the ability of ACF to serve our residents.”

- GAF Executive Director Doug Schwarz

Special Acknowledgement: David Rodman, Board Leader



David Rodman

The Greater Alliance Foundation recognizes retiring trustee David Rodman for his devoted leadership to the mission of GAF since 2008. Executive Director Doug Schwarz commented, “Having served as an exemplary member of the Board of Trustees, Dave has the financial expertise that was invaluable to our organization. He was the chair of our Investment Committee and also served our Foundation as president for nine years. Dave guided our organization with wisdom, integrity and vision.”

“Our donors deserve the greatest accolades and thanks. Without them, our mission would not be possible. They are our partners in service who have built ladders of opportunity for our community - and through philanthropic giving - those who climbed those ladders forever changed the quality of life in our community.

The Foundation board of trustees is comprised of an extremely capable and dedicated team of highly regarded community leaders. We also stand on the shoulders of our founders - Jack Peters and Chuck Grove.

Appreciation also goes to the selfless volunteers who serve on our committees, and to our director Doug Schwarz and his administrative team Heidi McClung, Marcie Curry and Linda Ferguson. What I observed over the course of my association with the Foundation is the expansion and blossoming of crucial relationships. This is essential to our work and gives me the greatest confidence and conviction that the best is yet to come for our Foundation and our community. Serving and leading GAF was really never about me. It takes all the aforementioned to make a successful community foundation, and our great success is due to many deserving people. It has been my pleasure and honor to serve.”

– David Rodman

Thank You, Dave!

New Donor Advised Fund Expands Keller Family Legacy

After Damon's father Jay passed away, his mother Lynn created the first Keller Family Donor Advised Fund at GAF in 2011. In creating the fund, she wanted to continue the legacy that had been shared with her late husband Jay, by providing ongoing charitable gifts to a variety of organizations that address community need.

Damon Keller has served on the Greater Alliance Foundation Board of Trustees since 2010 and is the GAF Marketing Committee Chair. In December of 2020, another Keller fund was created at the GAF – the **Damon and Amanda Keller Donor Advised Fund**. Damon and Amanda intend to involve the next generation in decisions about grants to area non-profits.



Damon and Amanda Keller

"We will be teaching our children about how to be good community stewards, how to start on the path of charitable giving and be strategic about it, and how to participate as a family. The new DAF we have established at the Greater Alliance Foundation serves so many purposes and honors my parents and family members in the process."

- Damon Keller

Simple Facts about a Donor Advised Fund (DAF)

- The most popular vehicle for charitable giving is a DAF because it is simple and flexible.
- You can name the fund for your family, business or a loved one.
- A DAF works like a combined charitable savings and checking account. DAFs allow you to support the causes that are important to you now, while also growing your charitable dollars for the future.
- You make the decisions about your charitable giving, and we handle all the rest!

Scholarship Donor:

Andrea Lee

Entrepreneur, Change Agent, and Mom

The **Above Average Women's Scholarship** was established at the Greater Alliance Foundation in April 2021, by Andrea Lee, an Alliance resident to motivate and inspire females to overcome obstacles in their lives, pursue their educational goals and reach their full potential. Last year Andrea started an entrepreneurial effort by creating the "Above Average" brand and digital magazine and this new scholarship will certainly compliment her effort.



Andrea Lee

When asked why she started the scholarship fund, Lee replied, *"I truly want to be a trailblazer and am at the point in my life where I can give time and money to the community. I want to do this in a purposeful way, and I am driven to be at the front of the line to lead the charge."*

Andrea added, "Part of my story is that I played football in middle school. My stepdad and coaches supported me, and I was strong and determined. I believe it is essential to be visible and recognized for who you are no matter what your skills, talents or experiences. I want to provide encouragement to other females who want to overcome obstacles, achieve their dreams and truly be themselves!"

If you would like to contribute to the **Above Average Women's Scholarship**
 Donate at www.GreaterAllianceFoundation.org.

Alliance Pregnancy Center Creates Two Funds



Larry Wilson, Gerry Richeson
Emily Trevino - Executive Director, Christy Ballor, Martha Palmer

The mission of the Alliance Pregnancy Center is to give support to Alliance area families before, during and after pregnancy. This faith-based organization offers free pregnancy testing, ultrasounds, testing and treatment, education on various topics, and distribute maternity products to clients in need. Referrals are given as needed, and many programs and groups are conducted for women in the greater Alliance area.

To support the mission of their organization both now and into the future, the Alliance Pregnancy Center created two new funds with the Greater Alliance Foundation earlier this year. One fund will be used as a way for the center to have a reserve fund for ongoing needs as determined by the Alliance Pregnancy Center's Board of Trustees. The second fund was established as an Agency Endowment Fund for the long-term financial stability of the

organization. Income from the endowment fund will provide a revenue source while maintaining the principal amount invested.

"We created these two new funds to demonstrate our goal for sustainability and to develop a partnership with our strong, local community foundation. The Greater Alliance Foundation already assisted us with two additional gifts for the new Endowment Fund and we know by working together, continued growth will occur."

– Emily Trevino - Executive Director, Alliance Pregnancy Center



Coming Soon Alliance Give 365

Later this year, the launch of GAF's new initiative **Alliance Give 365** will begin to make a difference in the community. The idea is simple: Give a dollar a day, \$365 per year, to make our Alliance community better. Pool those dollars with others and become a part of the grant-making process to assist area nonprofits.

"This unique opportunity to establish Alliance Give 365 among young professionals will help more people see themselves as emerging philanthropists in Alliance, and I am excited to be a part of it from the very beginning. My hope for 365 is that it turns into something really big for our community and that the next generation of philanthropists emerges strong."

– Chas Mitchell

**GAF is planning exciting things.
Join us and learn more!
info@GreaterAllianceFoundation.org**



Robertson Family Charitable Fund

Robertson Community Youth Center Alliance Parks and Recreation Fund

The **Robertson Family Charitable Fund** was established at GAF in 2000 by Virginia Robertson. This Donor Advised Fund allows the family to support various charities of their choice. A few years later, a second fund was established at the Greater Alliance Foundation. As explained by Sue Neil, "We were always involved in Y programs and have helped fund youth recreation activities. Years ago, the Alliance Youth Center was deteriorating, and we helped prevent it from closing. When it was transferred to the city, the **Alliance Parks and Recreation Fund** was created with GAF to support the pool and parks in memory of our grandfather, John Robertson. Today both funds continue to support the community, including the **Robertson Community Youth Center**, which is now a popular spot for Alliance area kids and families."

An Interview with Scott Robertson and Sue Neil

If you have ever visited Robertson Heating Supply in Alliance, what you may not know is that several generations of the Robertson family have been involved in the company. Creating a strong, family-oriented culture is top priority for the Robertson family. So is charitable giving and support of the Alliance community through the Greater Alliance Foundation.



Scott Robertson

Sue Neil

The company's founder, John Robertson, started the business in 1934 from a garage in Alliance. From the back of a coal truck, he sold coal stoker furnaces to heating contractors. The company is still family-owned and operates a wholesale chain in five states. Robertson siblings Scott, Sue, Lori and Linda are the next generation leading the family business.

In a recent interview with Scott Robertson and Sue Neil, it was clear that they give credit and thanks to grandparents, John and Virginia Robertson. They echoed, "Grandpa and Nana provided the foundation and foresight. They created a successful business, brought their family into the fold, and continuously supported the Alliance area through their charitable giving for many decades. We have and will continue to do the same."

Legacy and Giving Back



Sue Neil, Linda Robertson, Ed Robertson (father), Lori Keller, Scott Robertson

"The Robertsons are truly dedicated to improving Alliance, and it's fun working together and for each of us to use our special talents to help the business and to help the community. The values were shown to us by our grandparents and have been carried down from generation to generation. We make it a point to thank our community for their support by giving back and we are extremely proud to be a part of the Alliance area. Our community means everything to us."

*– Sue Neil, Human Resources Director
Robertson Heating Supply*

"When Keith Veres, a founding Trustee of GAF, moved away due to a work transfer, I was appointed to the Greater Alliance Foundation Board of Trustees and served from 2002 to 2016. During that period of time, I learned first-hand about the pressing needs of our community. Presentations given to the board by different organizations were very powerful, and the stewardship and oversight provided by the Foundation was exceptional. GAF is a trusted and respected partner for philanthropy, and my family knows first-hand."

*– Scott Robertson, President
Robertson Heating Supply*

New Raptor Hallow Sanctuary receives GAF Grant

Now located at the beautiful Beech Creek Botanical Gardens, the mission of Raptor Hallow Sanctuary is to protect the earth's biodiversity, and to secure the future of all bird of prey species in their natural habitats. Raptor Hallow focuses on community engagement, education, and conservation.

The Greater Alliance Foundation provided funding in the amount of \$16,000 for two multi-purpose buildings.



Other Recent Grants

- \$50K Alliance Area Domestic Violence Shelter**
In partnership with ACHF for immediate needs
- \$25K Alliance Area Habitat for Humanity**
Emergency funding for lumber, plumbing and electrical for current family build
- \$15K Alliance Area Senior Center**
Replace spouting and repair of exterior masonry walls
- \$5K Alliance Friends of the Parks**
Capital improvements to Coastal Pet-Burnell Dog Park
- \$15K Alliance Historical Society**
Structural repairs to porch pillars and facia, brick repointing
- \$6.4K Alliance Police Department**
In partnership with ACHF for workout equipment
- \$1K Alliance Pregnancy Center**
Diapers, formula, supplies
- \$3.25K Alliance Shade Tree Commission**
Tree planting at Silver Park, YWCA, Glamorgan Castle, Alliance City Cemetery, Habitat House, Beech Creek, Beech Creek Botanical Garden and Nature Preserve
- \$2.5K Canton Symphony Orchestra**
Music/nature themed educational performances at Beech Creek Botanical Gardens
- \$3K Michael's World**
Children's clothing and shoes
- \$1K YWCA of Alliance**
Meals on Wheels
- \$58.5K YWCA Summer Explorers**
Free eight-week summer enrichment program to maintain and grow math, literacy, and leadership skills

Start A Fund

The Greater Alliance Foundation enjoys working with donors as they find ways to achieve their charitable goals. Each situation is unique, and we work closely with the donor and their financial advisor, attorney and/or CPA when a new fund is created. There are several charitable fund types, and GAF welcomes having a conversation with you and your team of professional advisors.

- You do not have to choose between leaving a gift to your family or charity. You can do both.
- Gifts of all sizes make a difference.
- You have many options.
- It's easy.



Your New Fund at GAF

As you consider starting a fund at the Greater Alliance Foundation, there are many ways to give. Let us help you find what's best for you!

- Outright Gift
- Bequest by Will or Living Trust
- Qualified Charitable Distributions IRA
- Life Insurance Policies
- Gifts of Property
- Charitable Gift Bunching

Please visit www.GreaterAllianceFoundation.org to learn more about our funds, donors, and grants.

Linda S. Ferguson
Director of Donor and Community Relations

330.823.8560 – office
330.206.4899 – cell

lfergason@GreaterAllianceFoundation.org