



## Despite COVID shutdowns, Foundation grants more than \$1 million to deserving community causes during 2020



Board Chair **Roger Nicol**, *left* and Executive Director **David Vollrath**

“It’s good to see you again.” This summer, that simple greeting took on new meaning - certainly for the leadership team of The Union County Foundation - as we reconnected face-to-face without COVID masks.

As we update

you through this summer newsletter, we have realistic hopes of seeing you “live and in person” at UCF events that are back on the calendar for 2021.

While the last 18 months have been anything but normal, we are pleased to report that the work of the Foundation continued in earnest. In 2020 we distributed a near-record \$1,127,883 to Union County and Central Ohio charitable projects and causes. Of that amount, \$199,668 of academic scholarships were awarded to graduating Union County high school seniors and special needs youth for camp scholarships. More than \$57,700 was allocated through our quarterly competitive grant process. We were determined not to let COVID disrupt the impact of the Foundation on our community ... and it didn’t!

Another bright spot in the difficult year was stronger-than-ever response to UCF’s annual operating campaign called “Friends of the Foundation.” Perhaps it was because the pandemic forced us to cancel activities through which many of you contribute to the Foundation. Perhaps it was growing awareness that, as the number of designated donor gifts increase (we currently house 115 named funds), so does the cost to manage UCF operations. The bottom line: more of you gave more than ever! Individual “Friends” expanded from 58 in 2019 to 90 last year, with contributions doubling from \$10,000 to \$21,000.

We appreciate your generosity and hope you’ll consider stepping up again as a 2021 “Friend.” You can use the donation envelope enclosed with this newsletter or visit the UCF website, [unioncountyfoundation.org](http://unioncountyfoundation.org).

Mark your calendars and check our website for details as we revive UCF’S slate of autumn programming: the Union County Covered Bridges Cycling Tour on September 4, the Annual Celebration Dinner on September 30 and the Estate Planning Seminar on October 14. Thank you in advance for your ongoing support and for helping the Foundation make 2021 another wonderfully impactful year for Union County!

## Four “founding trustees” pass away in past year

The Union County Foundation lost four of its early leaders during the past 12 months with the deaths of Judge Robert Evans, Jr. (10/13/32 – 3/17/21), Myron Gallogly (4/25/40 – 4/6/21), Robert Lewis, Jr. (5/15/50 – 1/28/21) and Dorothy Mudgett (7/4/34 – 7/24/20)

“These ‘founding trustees’ were among two groups we honored during our 20th anniversary in 2013,” said Executive Director David Vollrath, noting that Mudgett and Lewis were on the original UCF board when the organization was chartered by the Ohio Secretary of State in 1993.

“And Robert Evans and Myron Gallogly were serving on the board in 1998 when it decided to significantly advance the Foundation by hiring its first executive director.

“These boards – and their individual members – forever impacted our community by moving the Foundation forward. Many of us have wonderful memories of these friends now passed,” Vollrath added.

“We owe them a debt of gratitude and will recognize them for their dedication and commitment at our annual celebration on September 30.”

Members of the 2021 Union County Foundation board of trustees are, *from left*, Chair **Roger Nicol**, **Jim Vandre**, **Meg Michel**, Vice Chair **Cathy Blackford**, **Ryan Mickelson**, **Judi Green**, Secretary-Treasurer **Christina Horan**, Past Chair **Chris Schmenk**, Executive Director **David Vollrath**, **Andrea Weaver**, **Chip Hubbs**, **Jennifer Morrison**, **Mark Stover** and **Holly Underwood**. Trustees not pictured are **Gary Lee** and **Ron Zimmerly**.



## UCF Named Funds can help donor as well as beneficiaries

While COVID delayed many activities last year, The Union County Foundation continued to receive contributions – including the establishment of several special-focus funds by generous donors.

There are 115 “Named Funds” being managed by the Foundation, supporting local causes as diverse as college scholarships, special needs camps, veterans’ memorials, church programs and wellness campaigns. Named Funds often reflect the passion of their founders, such as the one featured here.

### The Stephenson Family Fund

*Created by:* Melissa Stephenson and her daughter, Christina Horan

*Focus of support:* Programs making a direct impact serving communities in need

Melissa spent 30 years of her four-decade career working as an engineer for Boeing and McDonnell Douglas, raising three children in several cities for much of that time as a single parent. Her daughter, Christina Horan, is president of Richwood Financial, a division of Richwood Bank, and a board member of the Union County Foundation.

When Melissa decided to retire from Boeing at the end of 2020, Christina suggested setting up a donor-advised fund through the Foundation. As a Certified Financial Planner, Christina noted that establishing this type of fund could provide several advantages for her mother.

“For individuals with an unprecedented income in one year, creating a donor-advised fund can significantly reduce their tax obligation,” she said.

Not only could the fund be tax-beneficial for Melissa as she received a lump-sum retirement payment, it enables her to maintain a practice she has long embraced: tithing. Christina said many retirees intend to always make an annual gift to their churches or beloved charities. “If you know you are going to continue giving, you can create a fund now and use it for the rest of your life for causes you believe in.”

Melissa said she is most interested in programs that directly serve communities in need, especially women and children.

“I believe in meeting people where you can make a difference – whether it’s hospice, service organizations like Rotary, even my church” she said. “Creating this fund, right here where my daughter and her family live, is especially meaningful because it will have a positive impact in her community.”



Melissa Stephenson had a four-decade engineering career and raised three children, from left, Adam, Tyler and Christina Mattmuller (seen in the late 1990s).



When she retired from Boeing last year, Melissa and her daughter, Christina, created a donor-advised fund through the Union County Foundation.



The Foundation’s “Covered Bridges Cycling Tour” is back on the calendar: set for Saturday, September 4. The event will again begin at Edgewood Elementary School and offers routes of 19, 31, 61 and 74 miles. The longer routes through Union, Champaign and Logan counties will feature four covered bridges. Advance registration is \$20 per person (\$25 day of ride) and can be completed through the Foundation or on site.



UCF’s Annual Celebration – a dinner which attracts more than 150 guests – was canceled in 2020 due to COVID shut downs, but is scheduled for Thursday, September 30 at the new Catholic Parish Life Center, 1033 W. Fifth Street. Tickets for this year’s fundraising event, whose theme is “Home is Where the Heart Is,” are \$75 each and may be purchased by contacting the Foundation at 937-642-9618 or online at [unioncountyfoundation.org](http://unioncountyfoundation.org).

To learn how you can develop a charitable fund through the Foundation, contact Executive Director David Vollrath at 937-642-9618 or [info@unioncountyfoundation.org](mailto:info@unioncountyfoundation.org).