



Practice of Appalachian Community Foundations

Foundation for Appalachian Ohio

March 13, 2012

Foundation for Appalachian Ohio (FAO)



- Created in 1998 with a \$1 million state challenge grant
- 13 board members
- 8 staff members
- Headquarters are in Nelsonville, Ohio

Assets

Approximately

- \$10 million in assets
 - Include \$856,000 received at year-end, at \$11 million
 - 60/40 split of Endowed/ Non-Endowed
 - \$2,383,000 is associated with geographic affiliate “family of funds” arrangements
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- Gifts range from \$1 - \$1 million
 - 1,245 donors historically; 240 donors in 2011

Fund type	Number	Assets
FAO Endowment	2	\$ 640,000
Field-of-Interest	13	\$ 1,260,000
Scholarship	19	\$ 2,840,000
Agency/Designated*	31	\$ 1,980,000
Donor-advised	14	\$ 1,260,000
FAO Program Investments	-	\$ 2,000,000
TOTAL	79	\$ 9,980,000

Current as of May 31, 2011.
 Does not include significant year-end giving
 * Includes geographic affiliates’ core unrestricted fund

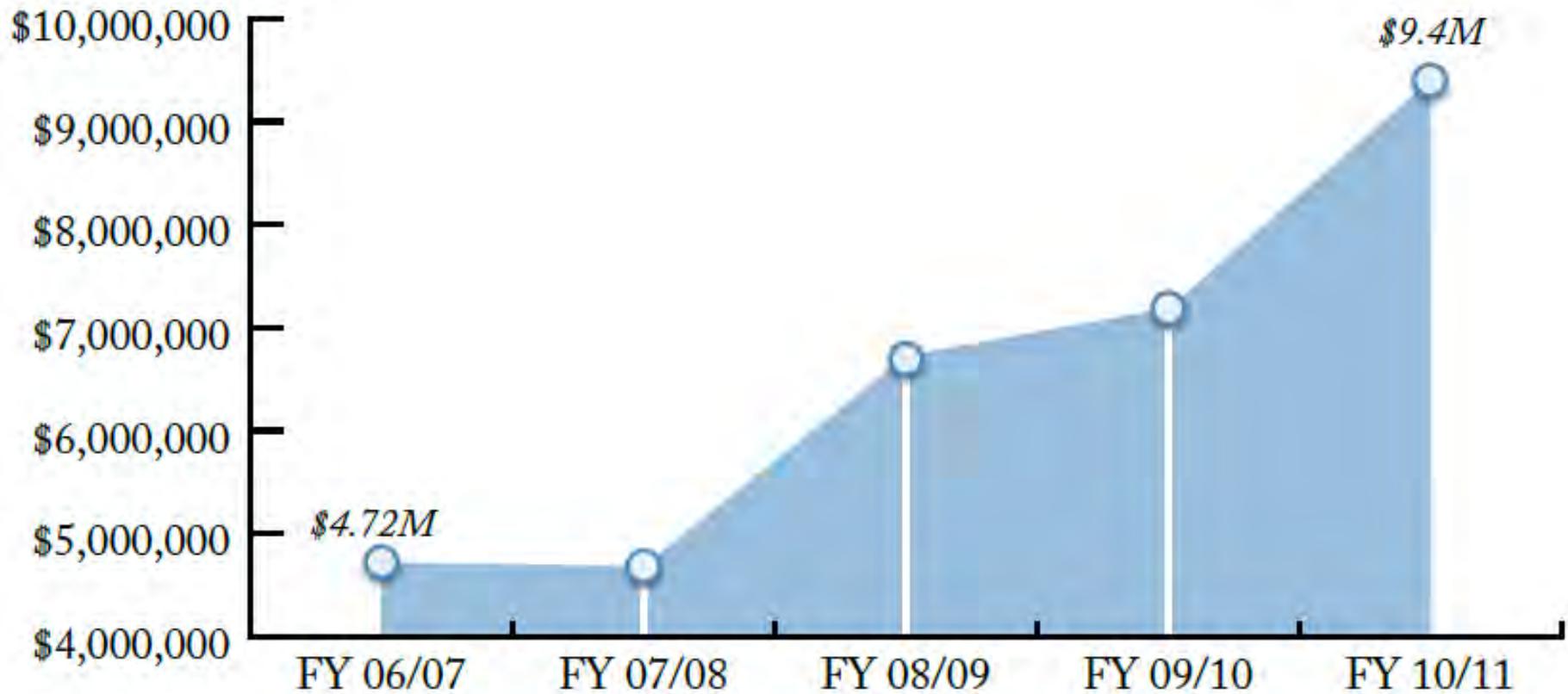
FAO Geographic Affiliate “Families of Funds”



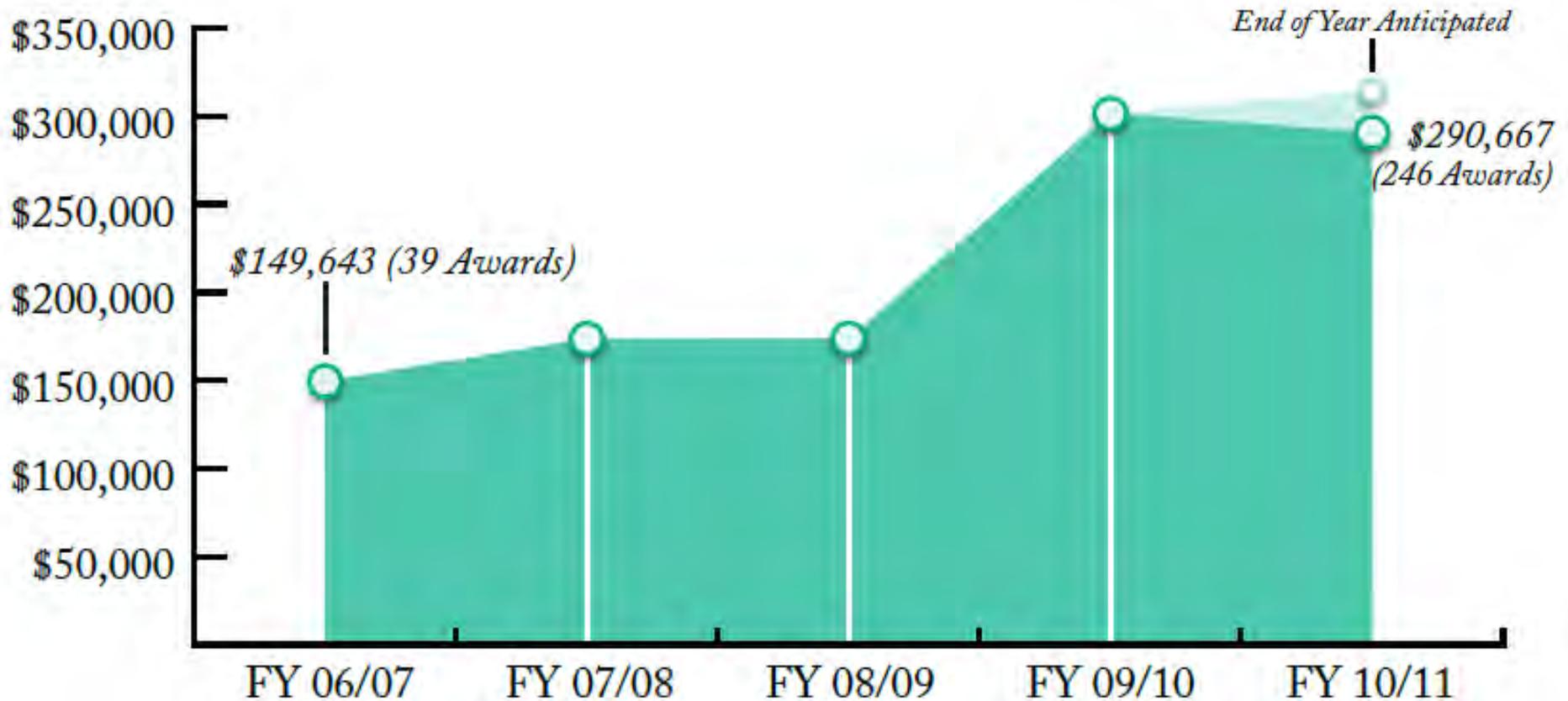
- ❑ **Nine counties** are now served by a geographic affiliate “Family of Funds”
- ❑ First family of funds (Guernsey County) has grown to over **\$2 million**, in county assets, with 21 component funds!



Asset Development



Grants Awarded



Program Investment

- ❑ *Directly* Invested over \$2.8 million – attracted much more
- ❑ Adopted focus on creating educational opportunities in 2008
- ❑ Non-grant investment:
 - ❑ Convening and connecting
 - ❑ Incubation of collaborations
 - ❑ Championing region/encouraging citizens
 - ❑ Research



FAO Convening at what became start of virtual STEMM Learning Platform



“I’m a Child of Appalachia” Network



ICAN! Components

1. Donor membership network
2. Citizens award
3. Advertising campaign
4. Writing contest
5. Soon to come – ICAN! Menu



One Illustrative Story...

ICAN! Corporate Partnerships

Investing together to create educational opportunities...



Incubation...

And more Incubation

Ohio Appalachian Business Council (OABC)

- 32-county business membership vehicle to serve as voice to champion region's economic competitiveness
- Subsidiary – Appalachian Partnership for Economic Growth.
 - ▣ Create new jobs and net new payroll
 - ▣ Increase number of business projects and investments in region
 - ▣ Generate value/ROI in region

Appalachian Partnership for Economic Growth (APEG)

JobsOhio Partnership for Jobs and Investment

1

Retain, Grow, Attract

2

New / Emerging Opportunities

3

Civic Infrastructure

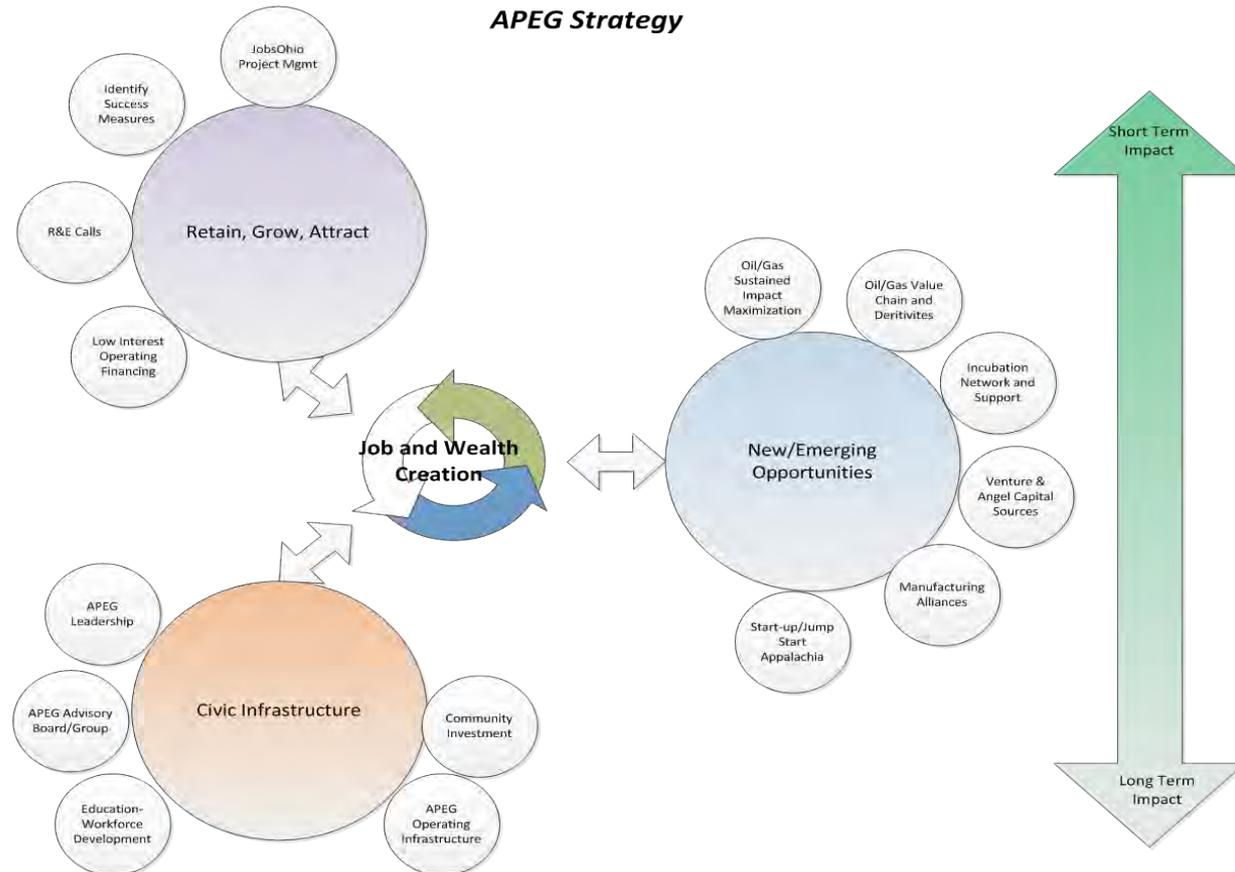
- Strengthen existing regional networks
- Quicken process of matching resources
- Identify core competitive regional strengths
- Become aggressive and entrepreneurial

Alignment of regional platforms to create local value

Making Appalachian Ohio best place in America to start and operate an entrepreneurial business

Leveraging the connection between philanthropic and economic development to grow both resource sets

Version 31-dec-11



Factors in FAO success

- 1. Flexible, organizational capacity-building funding**
 - Allows agility to respond to dynamic opportunities to meet mission and develop organization
- 2. Value proposition of *regional* community foundation to...**
 - Local philanthropic efforts
 - Corporate partners with multi-county footprint
 - Governmental partners struggling to have impact in distressed/rural areas

Challenges to Sustainability

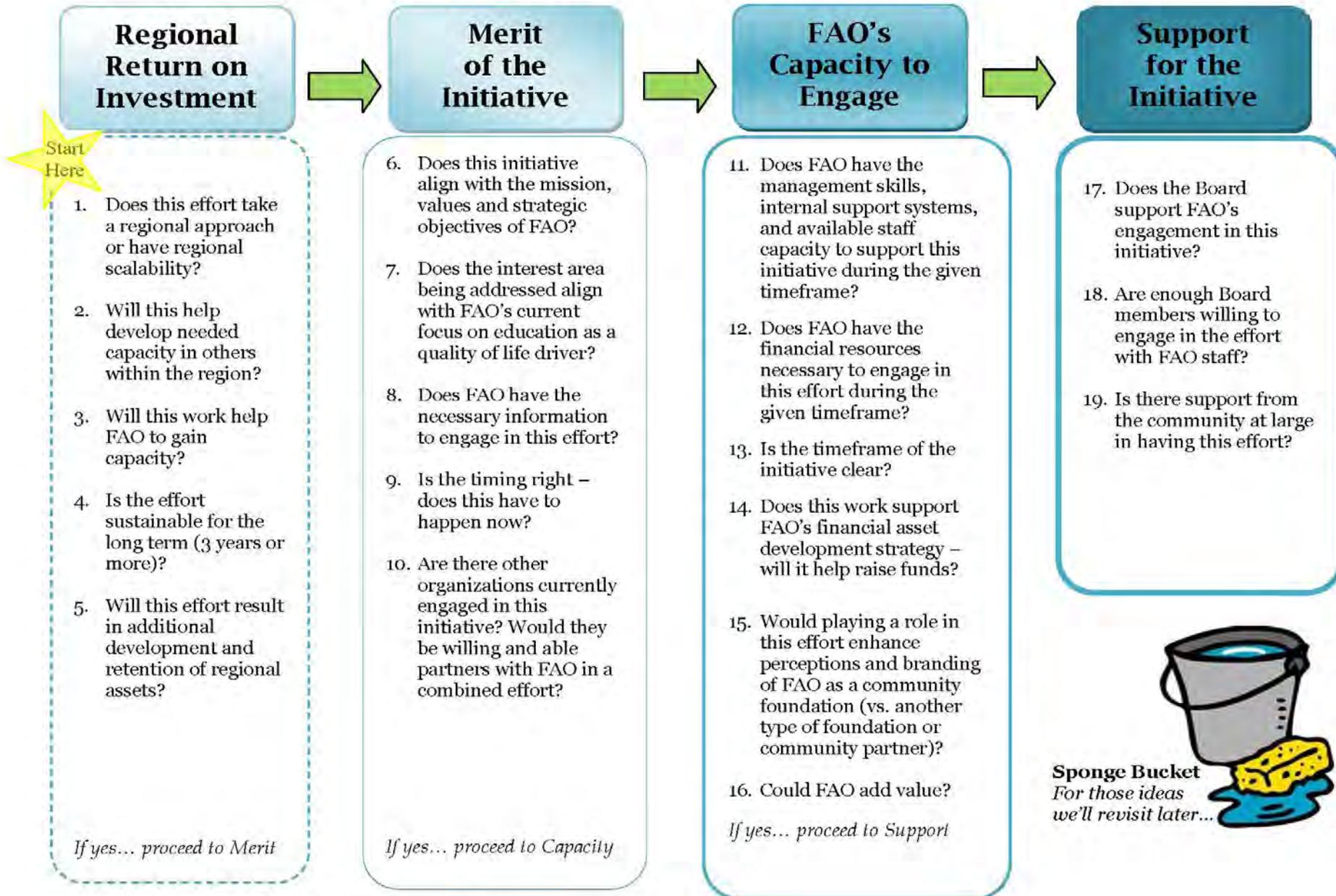
1. Finding operational underwriting

- So you strike the right balance of self-incubation while incubating and giving to others
- Continue to control your own destiny and responsibility of stewarding vision of the region's best interest (17-step litmus test)
- Meet the intense set of time resources required to align independent, multi-sector action in an under-resourced environment

Could produce more results

- 1. Flexible funding that is an investment in FAO's capacity to meet its mission**
- 2. Clear organizational metrics tied to this funding**
 - FAO's scorecard & Litmus Test**

WHEN TO ENGAGE IN COMMUNITY LEADERSHIP *DRAFT*





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