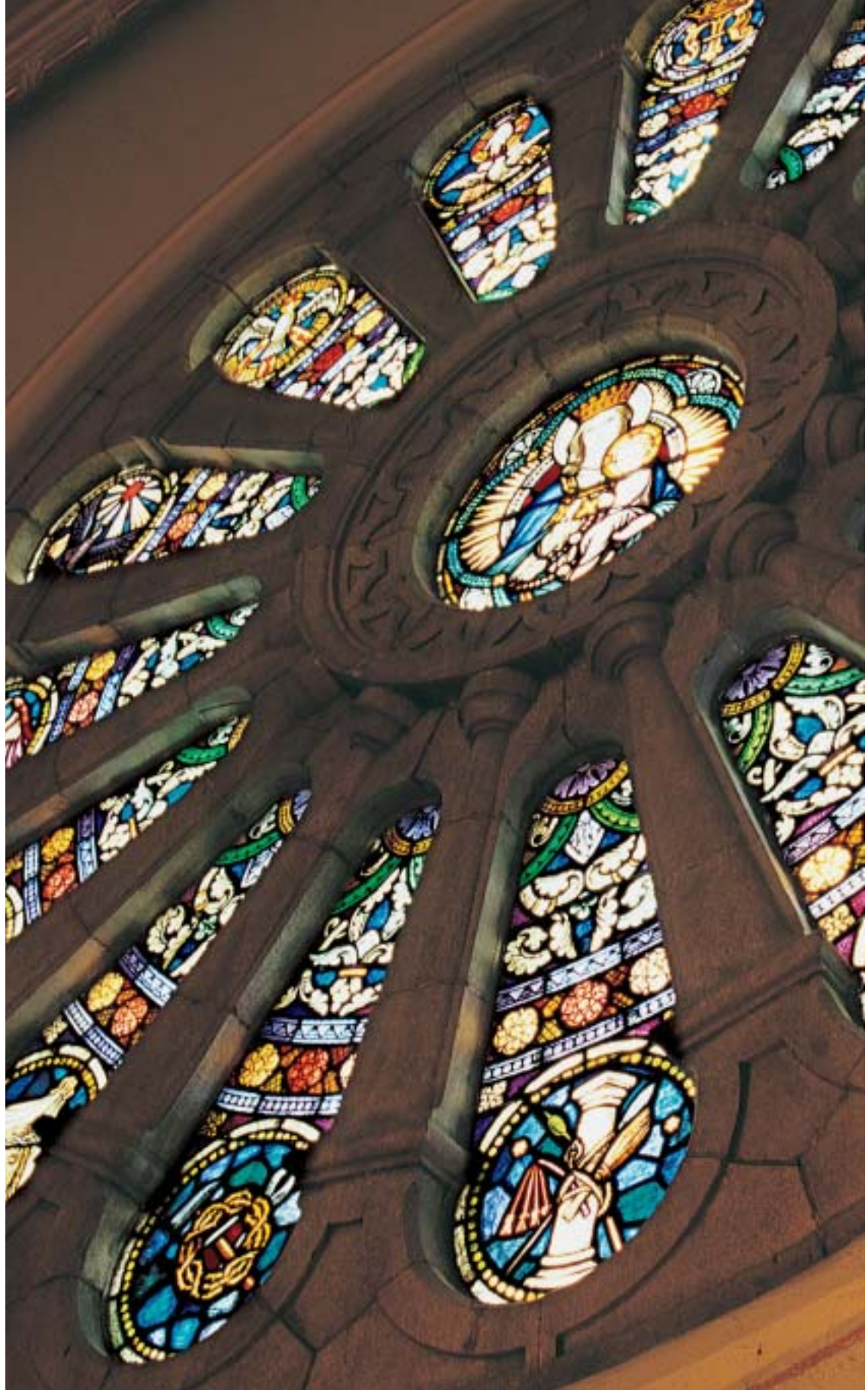




## M i s s i o n

To provide resources to organizations  
that demonstrate best practices  
in helping men, women and children  
reach their full potential.



*Dear Friends,*

*We are pleased to share with you the Mathile Family Foundation 2000 Annual Report, marking our 12th year of supporting worthwhile programs within our communities.*

*The new millennium ushered in the beginning of the Mathile Community Fund. The Fund's mission is:*

To support large-scale projects in Montgomery County that promote  
the long-range future of the community.

*This exciting fund, established in 1999 following the sale of The Iams Company to Procter & Gamble, allows the Foundation to explore new opportunities to serve our neighbors.*

*During the past year, we partnered with 153 nonprofit organizations dedicated to responding to people in need. Within these pages, you will meet some remarkable people who dared to dream big, who embraced, with passion, bright ideas designed to improve our communities for years to come.*

*Working with our partners, the Mathile Family Foundation continues to enhance the grantmaking process. While the Foundation will continue our practice of responsive grantmaking, we also seek to improve our strategic approach to achieve our mission:*

To provide resources to organizations that demonstrate best practices  
in helping men, women and children reach their full potential.

*With so many blessings already bestowed upon us, it is with great joy and optimism that we enter a new era of giving.*

*In His Service,*



MaryAnn Mathile



Clayton L. Mathile

*Dear Friends,*

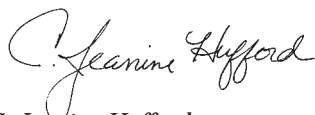
*It is a great pleasure to support the depth and range of worthwhile projects shared with the Mathile Family Foundation. In addition to grantmaking in the year 2000, the staff and leadership of the Foundation focused on transitioning the organization for the future.*

*The need for transition came as a result of the generous contribution from Clayton and MaryAnn Mathile to the Mathile Family Foundation in December of 1999. The Foundation's asset base increased nearly tenfold and is reflected in the financial sections of this report. This contribution includes the \$100 million earmarked for the Mathile Community Fund.*

*In an effort to maintain high-quality service to our partners, the Foundation spent time planning for the future. The review of the Foundation mission inspired us to refine the statement we have embraced for 12 years. We anticipate that our most successful partner organizations will use strategies to expand their effectiveness beyond the scope of individual projects.*

*The transition is not complete. Our staff has expanded and our processes are being refined in order to support responsive and strategic grantmaking. We expect to introduce new and exciting advancements over the next several years. None of this, of course, would be possible without the incredible generosity of Clayton and MaryAnn Mathile. On behalf of our communities, I thank them.*

*Sincerely,*

A handwritten signature in black ink that reads "C. Jeanine Hufford". The signature is written in a cursive style with a large, looped initial "C".

*C. Jeanine Hufford*

*Executive Director*

# Table of Contents

<b>Mathile Community Fund</b> .....	7
Financial Statements.....	9
Application Guidelines .....	10
<b>Mathile Family Foundation</b>	
Children .....	11
Grants Awarded .....	13
Education .....	15
Grants Awarded .....	17
Meeting Basic Human Needs .....	19
Grants Awarded .....	21
Free Enterprise Education and Other .....	23
Grants Awarded .....	24
TEAMPLAN!™ .....	25
Grants Awarded .....	27
Application Guidelines.....	28
Financial Statements.....	29
2000 Grantmaking Summary .....	30
Application Guidelines .....	31
Trustees and Staff .....	33



# Mathile Community Fund

*Featured Grant*

## Downtown Dayton Renaissance Fund



Image © 2000 Andy Snow

*“The Benjamin and Marian Schuster Performing Arts Center will offer Greater Dayton–area audiences and artists a truly world-class facility.”*

Mark Light, President  
Arts Center Foundation

Created to revitalize downtown Dayton, the Renaissance Fund is supporting construction of the Benjamin and Marian Schuster Performing Arts Center.

Visitors to the Schuster Center will enjoy a diverse selection of cultural experiences, from

classical music and ballet to contemporary and folk dance. This world-class facility will embrace all facets of the performing arts.

When it opens at the close of 2002, the Schuster Center will house a concert hall, Wintergarden and an office and residential tower.

A six-story glass atrium will reveal a spectacular southern exposure. The gift from the Mathile Community Fund will support the rehearsal hall, also known as the black box theatre. This theatre will serve as a flexible space for rehearsals, children's plays, educational presentations, smaller concerts for high school choirs or bands and community events. The Benjamin and Marian Schuster Performing Arts Center will provide a permanent home to the Dayton Philharmonic, as well as bring the arts to thousands of people each season.

The Mathile Family Foundation provides resources dedicated to helping men, women and children reach their full potential. The purpose of the Mathile Community Fund is to expand the Foundation's efforts from helping individuals achieve their potential to helping communities within Montgomery County realize their potential.

The \$100 million Mathile Community Fund is the family's gift to the Montgomery County community. A total of \$5 million in grants will be awarded twice in 2001 and annually thereafter. Proposals will be accepted by invitation only.



# Financial Statements

## Mathile Community Fund (a Fund within Mathile Family Foundation)

### Statements of Assets and Fund Balance as of November 30, 2000, and 1999

---

	<u>2000</u>	<u>1999</u>
<b>Assets:</b>		
Cash and cash equivalents	\$ 1,211,730	\$ 0
Investments, at fair market value	<u>91,624,716</u>	<u>0</u>
Total assets	\$ <u>92,836,446</u>	\$ <u>0</u>
<b>Fund balance</b>	<b>\$ <u>92,836,446</u></b>	<b>\$ <u>0</u></b>

### Statement of Receipts, Expenditures and Changes in Fund Balance for the Year Ended November 30, 2000

---

	<u>2000</u>
<b>Receipts:</b>	
Contributions	\$100,000,000
Investment income (loss)	<u>(1,730,717)</u>
Total receipts	<u>98,269,283</u>
<b>Expenditures:</b>	
Grants	5,000,000
Operating expenses	<u>432,837</u>
Total expenditures	<u>5,432,837</u>
Receipts over expenditures	92,836,446
Fund balance, beginning of year	<u>0</u>
<b>Fund balance, end of year</b>	<b>\$ <u>92,836,446</u></b>

*The above financial statements represent an excerpt of the financial statements that were reviewed by Arthur Andersen LLP.*

# Guidelines

## Mathile Community Fund

### Mission

To support large-scale projects in Montgomery County that promote the long-range future of the community.

### Areas of Concentration

- Arts and recreation
- Economic revitalization
- Education
- Institutional capacity building
- Special initiatives

### Grantmaking Process

The Mathile Family Foundation interviews advisors from a cross-section of community leaders to draw up a prioritized list of programs, projects and initiatives for funding. Requests for proposal are extended based on the priority list and interests of the Foundation. The Mathile Community Fund grant review committee determines grant recipients and amounts.

### Grant Awards

- Geographic priority: Montgomery County, Ohio
- Duration of grants: One year
- Grant request amount: \$500,000 minimum
- Grants will be announced annually

### Types of Projects Supported

The Mathile Community Fund supports programs, projects and initiatives that enhance the long-range future of Montgomery County and that meet the Fund's mission and focus areas.

### Proposals

1. The Foundation extends invitations for proposals annually
2. Proposals must include the following:
  - Show 50% support for the program in the form of signed pledges or written commitments
  - Business plan
  - Budget and cash flow projections
3. Eligible organizations must be tax exempt and maintain valid status under Internal Revenue Code Section 501(c)(3)
4. Not accepted are:
  - Unsolicited proposals
  - Multi-year pledges
  - Endowment requests
  - Mass mailings

# Children

*Featured Grant*  
Volunteers of America



*“The kids come away with not just knowledge about how a bike works, but how the process works. They learn patience, wisdom and self-discipline to get the work done.”*

Matthew Hawley, Youth Coordinator  
Dayton Volunteers of America Community Center

Volunteers of America provides families with housing, emergency food assistance, job placement and career training, literacy and education programs, and life-skills training. Along with these programs, the Dayton Volunteers of America Community Center provides residents of the east Dayton neighborhood with community

information forums, adult learning, support groups, chapel services and youth clubs.

In 2000, with funding from the Mathile Family Foundation, the Center began a bicycle repair program for youth ages 13 to 17. The bike repair program was Matt Hawley’s dream. He came to

the Center six years ago as a college student who believed his passion for cycling could teach job skills, as well as values, to neighborhood youth.

“The bike shop provides a good framework for teaching young men and women self-discipline, the value of teamwork and how to care for tools. These things aren’t easy to teach, but the teens’ involvement gives them an opportunity to begin to develop these skills,” says Hawley. Bicycles are provided through a partnership with a local commercial bike shop as donations or are brought in from the community for repair.

With the teens’ enthusiasm, parents are taking notice of other community services offered by the Center. “To make an impact on the community, we need to get entire families involved,” explains Richard Cagno, director of educational projects for the Dayton Volunteers of America Community Center.

Hawley adds, “And we’ve already seen some wonderful results. Commercial bike shops are offering jobs to some of the program graduates, while others are taking their skills into the community and putting them to good use.”



# Children Grants Awarded

\$ 1 , 1 4 8 , 0 7 5

With emphasis on helping underprivileged and at-risk children, the organizations in this focus area provided programs that develop children's emotional and physical needs, as well as building self-confidence. Grants were awarded to support project needs, general operating needs and capital improvements. The 49 grants awarded in this area averaged \$23,430, representing 16.4 percent of total dollars awarded.

## **Big Brothers/Big Sisters of Greater Dayton, Inc.**

Dayton, OH  
Youth Mentoring Initiatives

## **Boonshoft Museum of Discovery**

Dayton, OH  
Capital Campaign

## **Boy Scouts of America Tecumseh Council**

Springfield, OH  
Career Awareness and Exploring

## **Boys Hope/Girls Hope**

Bridgeton, MO  
Success for College Program (*North America*)  
Esperanza Juvenil Boys Home  
Guatemala City, Guatemala

## **Buckeye Trails Girl Scout Council**

Dayton, OH  
Buckeye Trails University

## **Building Bridges**

Dayton, OH  
Work Therapy at Humane Society

## **The Camp Fire Council of the Greater Dayton Area**

Dayton, OH  
Kids Kab Market Research  
Safety of Kids Program

## **Catholic Social Services of the Miami Valley**

Dayton, OH  
Beginnings The Adoption Center

## **The Children's Hospital Medical Center**

Cincinnati, OH  
International Adoption Center

## **The Children's Medical Center**

Dayton, OH  
Operating Support

## **Christ Child Society**

Dayton, OH  
Clothe-A-Child Campaign

## **Cincinnati Art Museum**

Cincinnati, OH  
After-School Art Adventures

## **Cystic Fibrosis Foundation**

Washington, DC  
Operating Support

## **Darke County Juvenile Court**

Greenville, OH  
Family Visitation Center

## **Daybreak**

Dayton, Ohio  
Youth Summer Program  
Operating Support

## **Dayton Boys and Girls Club**

Dayton, OH  
Operating Support

## **The Dayton Urban League**

Dayton, OH  
Male Responsibility Program (MRP)  
Girls Self-Expression Program  
Annual Youth Program

## **Elizabeth's New Life Center**

Dayton, OH  
Capital Campaign  
Operating Support

**Family Connection of Miami County, Inc.**  
Troy, OH  
Family Visitation Center

**Franciscan Foundation**  
Dayton, OH  
Baby & Me Program

**Give Kids the World Village**  
Kissimmee, FL  
Operating Support

**Golden Acres Migrant Ministrant Center**  
Tipp City, OH  
Children's Christmas Party

**Goodwill/Easter Seals of the Miami Valley**  
Dayton, OH  
Parent and At-Risk Infant Transition Program

**Greater Dayton Pro-Life Education Foundation**  
Dayton, OH  
Parent-Infant and Toddlers of Teens Programs

**K12 Gallery for Young People**  
Dayton, OH  
After School Studio Youth Training Program

**The Learning Tree Farm, Inc.**  
Dayton, OH  
Operating Support

**Martin Bayless Foundation**  
San Diego, CA  
Dayton Pro-Stars Football Camp

**The Muse Machine**  
Dayton, OH  
"My Fair Lady" Student Musical

**Ohio Hunger Task Force**  
Columbus, OH  
Family Child Care Homes in Montgomery and  
Greene Counties (*with Child Care Clearinghouse*)

**Ronald McDonald House Charities of  
Greater Cincinnati**  
Cincinnati, OH  
Capital Campaign

**Ronald McDonald House Charities of the  
Miami Valley Region**  
Dayton, OH  
Share-A-Night Program  
Capital Campaign

**South Community, Inc.**  
Dayton, OH  
Youth Summer Programs

**St. Joseph Children's Treatment Center**  
Dayton, OH  
Operating Support

**St. Joseph Orphanage**  
Cincinnati, OH  
Capital Support

**St. Mary Development Corporation**  
Dayton, OH  
Youth Development Project

**Tri-County Women's Network**  
Fairborn, OH  
Operating Support

**Urban Concern, Inc.**  
Columbus, OH  
Operating Support

**Victoria Theatre Association**  
Dayton, OH  
Children's Festival  
Children's DISCOVERY! Series

**Volunteers of America**  
Dayton, OH  
Bicycle Repair Shop for Youth

**Warren County Fraternal Order of Police,  
Lodge 103**  
Lebanon, OH  
Shop-With-A-Cop Children's Christmas Project

**Womanline**  
Dayton, OH  
Operating Support

**YMCA of Metropolitan Dayton**  
Dayton, OH  
Black Achievers Program

# E d u c a t i o n

*Featured Grant*

## Dayton Catholic Urban Elementary Schools



*“We strive to produce youngsters who are caring individuals  
and contributors to society.”*

Genevieve Ritzel, Principal

Our Lady of the Rosary Catholic Elementary School

In the past several years, six urban Catholic schools have found themselves facing significant challenges, including affordability for families, facility upkeep and new community schools that offer alternative education to families. The elementary schools — Corpus Christi, Dayton Catholic Accelerated Elementary, Holy Family,

Our Lady of Mercy, Our Lady of the Rosary and Resurrection Catholic — realized that together they could accomplish what alone they could not: maintaining a Catholic presence in the city and contributing to the revitalization of their neighborhoods.

The schools formed the Dayton Alliance for Catholic Urban Education to collaborate and strategize about how to fulfill their mission to serve urban families who seek a Catholic education for their children.

In addition, strategic planning helped to shape decisions by allowing the schools to view their situations realistically and search for ways to improve. “We all agreed that good teachers are an important component of a good school,” says Genevieve Ritzel, principal of Our Lady of the Rosary. “And we cannot keep good teachers if we do not adequately compensate them.” Out of that discussion grew a joint proposal funded by Mathile Family Foundation. The schools also received Foundation support for facility improvements and technology upgrades.

As a result, enrollments improved, a successful community campaign now supports the operating needs of the schools, facility needs are being addressed, and principals can reach out to families with confidence, regardless of their financial situation. Most importantly, all involved are buoyed by the commitment of many in the community who wish to invest in the continued vital presence of these urban Catholic schools.



# Education Grants Awarded

\$ 3 , 7 6 1 , 9 5 0

Organizations supported in this focus area sought to strengthen our communities' educational systems and help families gain access to education best suited to their needs. Forty grants for operating and capital support were awarded, averaging \$83,600. Dollars awarded totaled \$3,342,445, or 47.6 percent of the year 2000 awards. Nineteen scholarships totalling \$419,505, or 6 percent of total dollars were awarded.

## **Alliance Community Schools, Inc.**

Dayton, OH  
Dayton View Academy Community School

## **Alliance for Education**

Dayton, OH  
Operating Support

## **Carillon Historical Park**

Dayton, OH  
Capital Campaign

## **Catholic Campaign Office**

Dayton, OH  
Capital Campaign

## **The Center for Education Reform**

Washington, DC  
Operating Support

## **Central American Ministries**

Toledo, OH  
Francisco Koll School  
Guatemala City, Guatemala

## **Chaminade-Julienne Catholic High School**

Dayton, OH  
Retreat Programs for High School Seniors  
Operating Support  
Capital Campaign

## **The Cincinnati Zoo and Botanical Garden**

Cincinnati, OH  
School Services Program

## **Congregation of Divine Providence**

Melbourne, KY  
St. Camillus Academy in Corbin, KY

## **Cooperative for Educational Development**

Cincinnati, OH  
Textbook Project in Guatemala

## **Corpus Christi Church**

Dayton, OH  
Capital Improvements

## **Cox Arboretum & Gardens**

Dayton, OH  
Capital Campaign

## **Dare To Dream Foundation**

Dayton, OH  
Operating Support

## **Dayton Catholic Urban Elementary Schools**

Dayton, OH  
Capital Improvements

## **Holy Angels School**

Dayton, OH  
Operating Support

## **Holy Family School**

Dayton, OH  
Capital Improvements

## **Kids Voting USA-Ohio/Founders Region**

Dayton, OH  
Operating Support

## **Law Enforcement Foundation**

Dublin, OH  
Dayton-area schools D.A.R.E. Program

## **Marianist Provincialate**

Dayton, OH  
Our Lady of the Nazareth Primary School Project  
Nairobi, Kenya  
M.I.R.A.C.L.E. Vocational Training Center  
Karonga, Africa

## **Miami Valley Literacy Council**

Dayton, OH  
Operating Support

## **The National Conference for Community and Justice**

Dayton, OH  
Operating Support

**Our Lady of Mercy Church**

Dayton, OH  
Capital Improvements

**Our Lady of the Rosary**

Dayton, OH  
Capital Improvements

**Project READ Coalition**

Dayton, OH  
Miami Valley Reads Program

**Resurrection Catholic School**

Dayton, OH  
Capital Improvements

**Saint Helen Elementary School**

Dayton, OH  
Technology Upgrade

**Saint Mary's College**

Notre Dame, IN  
Center for Spirituality  
Jefferson Township Schools Book Project  
in Dayton

**Sisters of Notre Dame de Namur, Ohio Province**

Cincinnati, OH  
Capital Campaign

**St. Albert the Great School**

Dayton, OH  
Capital Support

**St. Bonaventure Indian Mission and School**

Thoreau, NM  
Operating Support

**St. Christopher School**

Vandalia, OH  
Operating Support

**St. Joseph Mission School**

Operating Support

**St. Rita School for the Deaf**

Cincinnati, OH  
Operating Support

**The Summit Country Day School**

Cincinnati, OH  
Technology Initiative  
Capital Campaign

**University of Dayton**

Dayton, OH  
Center for Catholic Education — Lalanne Program

**Scholarships**

**College of Mount St. Joseph**

Cincinnati, OH

**The Dayton Foundation**

Dayton, OH  
Parents Advancing Choice in Education (PACE)

**Elmira College**

Elmira, NY

**Executive Women International**

Dayton, OH

**Franciscan University of Steubenville**

Steubenville, OH

**Indiana State University**

Terre Haute, IN

**Kansas State University**

Manhattan, KS

**Miami University**

Oxford, OH

**North Central University**

Minneapolis, MN

**Ohio Foundation of Independent Colleges**

Columbus, OH

**Ohio Northern University**

Ada, OH

**Sinclair Community College Foundation**

Dayton, OH

**St. Christopher School**

Vandalia, OH

**University of Dayton**

Dayton, OH

**University of Michigan**

Ann Arbor, MI

**University of Notre Dame**

Notre Dame, IN

**Vanderbilt University**

Nashville, TN

**Wilberforce University**

Wilberforce, OH

**Wright State University**

Dayton, OH

# Meeting Basic Human Needs

*Featured Grant*  
Womanline of Dayton, Inc.



*“Reading helps build self-confidence. When mothers see their babies respond positively, they learn reading is a fun way to interact and connect with their children.”*

Linda Mercuri-Fischbach, Executive Director  
Womanline of Dayton, Inc.

Womanline began as a counseling center in 1971, offering pregnancy support services to single women. Thirty years later, services have expanded to include emergency assistance, positive parenting and abuse prevention educational programs, and support groups. In addition, professionals on staff offer counseling with a

special focus on sexual abuse and trauma issues for women.

This continuum of services offered by Womanline is structured to provide a lifetime of support to women. “We believe stable families are a direct result of healthy relationships and

a nurturing, safe environment,” says Linda Mercuri-Fischbach, executive director. “Parents who have not experienced such relationships and environments still can learn to parent healthfully and successfully if they receive education, counseling and support to parent well.” General operating support for Womanline was provided by the Mathile Family Foundation in 2000.

Womanline’s ABCs for Babies parenting program helps build stable families by teaching life skills to low-income, pregnant teens or young single mothers. Focusing on literacy and parenting, the program curriculum strives to create a bond between mother and child. Strengthening this bond helps prevent abuse and neglect and improves the literacy skills of parents and children. The program coordinator is assisted by a core group of volunteers, including members of the Christ Child Society of Dayton.

Out of ABCs for Babies grew a program called Gatherings. Womanline’s goal is to work with women individually and — when they are ready — bring them into support groups. Gatherings uses family traditions and craft making to get the women involved so they can support each other and continue the parenting learning process.

“Helping just one woman can bring about very dramatic changes in her life and the lives of her children and family,” says Mercuri-Fischbach.



# Meeting Basic Human Needs Grants Awarded

\$ 1 , 5 1 5 , 9 0 0

The organizations supported in this focus area offer hunger relief, counseling, outreach and spiritual guidance. Forty-nine grants were awarded for operating or capital support, representing 21.6 percent of total giving, and averaging \$30,900.

## **Alzheimer's Association Inc.**

Dayton, OH  
Operating Support

## **American Cancer Society–Dayton Area**

Dublin, OH  
Operating Support

## **American Diabetes Association–Dayton Area**

Washington, DC  
Operating Support

## **American Heart Association–Dayton Area**

Columbus, OH  
Operating Support

## **American Lung Association**

Dayton, OH  
Operating Support

## **Artemis**

Dayton, OH  
Domestic Violence Hotline with Dayton YWCA

## **The Center for Nonprofit Resources**

Dayton, OH  
Operating Support

## **The Children's Hospital Medical Center**

Cincinnati, OH  
Chaplain, Hematology/Oncology Department

## **CIMMYT**

Mexico City, Mexico  
Triticale Production  
Global Training Program

## **Clayton Fire and Rescue Association**

Clayton, OH  
Heat and Night Vision Camera

## **Community Design and Development Center**

Cincinnati, OH  
Dayton Community Development Needs Assessment

## **Dayton Fund for Home Rehabilitation**

Dayton, OH  
Operating Support

## **Dayton Urban Ministry Center**

Dayton, OH  
Operating Support

## **Dayton View CDC**

Dayton, OH  
Riverview Renaissance Project

## **Easter Seal Society**

Dayton, OH  
Operating Support

## **Epilepsy Foundation of Western Ohio**

Dayton, OH  
Prescription Assistance Program

## **Family Service Association**

Dayton, OH  
Resource Center Without Walls

## **First Step Home**

Cincinnati, OH  
Operating Support

## **Founders Family Center**

Dayton, OH  
Operating Support

## **The Gathering Place**

Thoreau, NM  
Operating Support

## **Global Village Communications, Inc.**

Bellbrook, OH  
Domestic Violence Video Training Series

## **Golden Acres Migrant Ministrant Center**

Tipp City, OH  
Operating Support

**Greene County Domestic Violence Project, Inc.**

Xenia, OH  
Capital Campaign

**Habitat for Humanity**

Dayton, OH  
Operating Support

**Holt Street Miracle Center**

Dayton, OH  
Operating Support

**Hospice of Dayton, Inc.**

Dayton, OH  
Positive Passages Program

**House of Bread**

Dayton, OH  
Operating Support

**Inclusion Network**

Cincinnati, OH  
Operating Support

**The Jeremiah Program**

Minneapolis, MN  
Operating Support

**Life Essentials**

Dayton, OH  
Operating Support

**March of Dimes – Dayton Area**

Akron, OH  
Operating Support

**Mercy Manor**

Dayton, OH  
Capital Support

**National Multiple Sclerosis Society**

Dayton, OH  
Operating Support

**Ohio Association of Second Harvest Foodbanks**

Columbus, OH  
Agricultural Surplus Production Alliance

**Ohio Hunger Task Force**

Columbus, OH  
Multicultural Initiative Food Program in  
Montgomery and Greene Counties

**Omega Community Development Corporation**

Dayton, OH  
Operating Support  
Property Acquisition

**The Other Place**

Dayton, OH  
Operating Support  
Bridge Fund of Dayton

**Parish Resource Center of Southwestern Ohio**

Dayton, OH  
Operating Support

**The Salvation Army**

Dayton, OH  
Operating Support

**Senior Resource Connection**

Dayton, OH  
Meal Delivery Vehicle

**Special Olympics Ohio**

Columbus, OH  
Operating Support

**SWEAT, Dayton's AmeriCorps Program**

Dayton, OH  
Operating Support

**United Way of Greater Dayton Area**

Dayton, OH  
Operating Support

**We Care Arts**

Dayton, OH  
Operating Support

**Wesley Community Center**

Dayton, OH  
Nutrition Services Program

**Womanline**

Dayton, OH  
Community Service Needs Assessment

**YWCA of Dayton**

Dayton, OH  
Domestic Violence Hotline in Collaboration  
with Artemis

## Free Enterprise Education and Other



*“Once individuals become stable in the workplace, it is only through additional skills training that they are able to achieve self-sufficiency.”*

Dave and Liane Phillips, Founders  
Cincinnati WORKS

Recipients of Free Enterprise Education awards educate the people they serve on the fundamentals of private and public enterprise, develop or sustain economic viability for their communities, or guide youth and adults in business practices. In addition to teaching the importance of solid business practices, these organizations seek to instill in their students an understanding of the free market and a desire to seek economic independence — both personally

and professionally. Beginning in 2001, Free Enterprise Education will transition as a focus area and grant awards will fall under our other three focus areas of Children, Education and Meeting Basic Human Needs.

Each year, a few grants are awarded within the Other category. Though these programs fell outside the Foundation’s focus areas, the work completed by the recipient organizations was consistent with our mission.

# Free Enterprise Education and Other Grants Awarded

\$ 5 8 8 , 0 0 0

Twelve grants totaling \$568,000 were awarded in Free Enterprise Education, representing 8.1 percent of total dollars awarded. The average grant size was \$47,300. Within the Other category, two grants totaling \$20,000 were awarded, making up less than 1 percent of total giving.

**Appalachian Peoples Action Coalition**

The Plains, OH  
Individual Development Account (IDA)  
Program

**Bergamo Center for Lifelong Learning**

Dayton, OH  
Faith in the Marketplace Symposium

**Cincinnati WORKS**

Cincinnati, OH  
Operating Support

**Dayton Business Committee**

Dayton, OH  
Community Assessment Project

**Dayton Regional Development Alliance**

Dayton, OH  
Marketing Campaign for Dayton Region

**The Dayton Urban League**

Dayton, OH  
Small Business Conference

**Ohio Business Week Foundation**

Columbus, OH  
Operating Support

**Old North Dayton Development Corporation**

Dayton, OH  
Best Practice Research for “Tool Up for Jobs in  
Your Neighborhood” Program

**The Partnership for Youth, Inc.**

Dayton, OH  
Operating Support

**Project IMPACT-Dayton, Inc.**

Dayton, OH  
Family Retaining Knowledge and Skills  
Program

**TechnoServe**

Sandomierz, Poland  
Center for Promotion and Support of  
Agricultural Enterprise

**TeenWorks**

Dayton, OH  
Operating Support

# TEAMPLAN!™

*Featured Grant*

## YMCA of Metropolitan Dayton



*“Through TEAMPLAN!™ and financial resources, the Mathile Family Foundation is truly supportive of an organization’s efforts to improve its infrastructure and capacity.”*

Mike Parks, President/CEO  
YMCA of Metropolitan Dayton

When Mike Parks took his position at the YMCA of Metropolitan Dayton, a board member recommended enrolling in the *Effective Planning* strategic planning course, a predecessor to TEAMPLAN! Based on the planning model, the YMCA developed a rolling five-year planning process. Each year, the board reevaluates those

goals and the organization’s ability to meet them. The planning process has allowed the YMCA to focus on the programs it does best and that have the most impact on the community.

Key to the strategic plan for the YMCA is collaboration and forging partnerships with other

organizations. One flourishing partnership is with the Dayton Academy community school. The West Dayton YMCA was heavily used on evenings and weekends, but virtually empty at other times.

“We created a 20-year collaborative agreement allowing the school to use the YMCA during the daytime and leveraging the YMCA before- and after-school programs to supplement the school’s curriculum,” says Parks. “This strategy has been very powerful. The facility is now fully utilized by the community.”

With the support of the Mathile Family Foundation from 1997 through 1999, the YMCA initiated an incentive program to encourage staff performance above and beyond the strategic plan. Today, there is solid proof that planning and incentives deliver results. “Our services to kids have doubled, and we’ve seen a 300 percent increase in membership,” says Parks. “The Foundation’s grants sparked our efforts and propelled us forward to grow and increase effectiveness.”



# TEAMPLAN!™

## A Product of Mathile Family Foundation

**Mission: To help nonprofit organizations create a plan.**

The Foundation offers this strategic planning product to provide expert templates for working through the planning process. During the past three years, 40 nonprofit organizations have received TEAMPLAN! The materials consist of a Leader's and Facilitator's Guide and workbooks for a planning team of up to ten members.

Through our partnership with The Center for Nonprofit Resources and Iams University, nonprofits are encouraged to attend the *Effective Planning* two-day workshop and half-day *Progress Review* workshop prior to requesting TEAMPLAN!

The courses help participants understand:

- Where your organization is today
- Where you want to go
- How you are going to get there

Recipients are evaluated on their S.W.O.T. (strengths, weaknesses, opportunities, threats) analyses and their commitment to the planning process. Upon approval of a request for TEAMPLAN!, a two-hour introductory session is provided for the nonprofit organization's planning team. Once the commitment is made to proceed, it will take the team five to seven months to develop a plan.

Planning is hard work and takes time. We value our partners' efforts to work through this process and strengthen their organizations.

## TEAMPLAN!™ Awarded

**Advisors Helping Agencies of Cincinnati, Inc.**  
Cincinnati, OH

**The Castle**  
Dayton, OH

**Marquette University**  
Milwaukee, WI

**Mercy Manor**  
Dayton, OH

**SC Ministry Foundation**  
Cincinnati, OH

**TeenWorks**  
Dayton, OH

# Guidelines

## TEAMPLAN!™

### Mission

To help nonprofit organizations create a plan.

### Grant Awards

- Organizations requesting TEAMPLAN! must be tax exempt under Internal Revenue Code Section 501(c)(3)
- TEAMPLAN! is awarded as an in-kind grant
- One Facilitator's Guide
- Ten Participant Kits
- Additional participant kits may be purchased for a nominal cost
- Notification is 60 days after the deadline
- Grant proposals to fund the position of facilitator are not accepted

### Proposals

Initial inquiries may be made by phone or letter. The formal proposal should include a letter requesting TEAMPLAN! signed by the chief executive officer and board chairman. The letter should include a brief history and the purpose of the organization.

Please include one copy of the following supporting documentation:

- S.W.O.T. analysis (include in the letter a statement on how this was conducted)
- *Effective Planning* workshop completion certificate

- IRS letter verifying tax exempt status, including federal tax identification number
- List of planning team members and their constituencies
- Prior business plan, if available

### Proposal Deadlines

February 1	April 1	June 1
August 1	October 1	December 1

### Selection Process

- The Foundation will provide written notification upon receipt of an application
- Applicants will be contacted if additional information is required to become qualified
- Applicants selected as candidates for TEAMPLAN! will receive written notification
- The chief executive officer of the selected nonprofit organization will be asked to contact the Foundation to schedule a two-hour TEAMPLAN! Qualifying Session
- A private, two-hour Qualifying Session will be held to review the TEAMPLAN! process

### Award Notification

- Award recipients will receive a letter from the Foundation and the in-kind grant award of TEAMPLAN!
- The nonprofit organization will be asked to sign a contract of commitment to TEAMPLAN!

# Financial Statements

## Mathile Family Foundation

(Excluding Mathile Community Fund)

### Statements of Assets and Fund Balance as of November 30, 2000, and 1999

	<u>2000</u>	<u>1999</u>
<b>Assets:</b>		
Cash and cash equivalents	\$ 2,832,889	\$ 82,828
Investments, at fair market value	214,208,379	37,750,064
Other assets	<u>0</u>	<u>241,411</u>
Total assets	<u>\$ 217,041,268</u>	<u>\$ 38,074,303</u>
<b>Fund balance</b>	<b><u>\$ 217,041,268</u></b>	<b><u>\$ 38,074,303</u></b>

### Statement of Receipts, Expenditures and Changes in Fund Balance for the Year Ended November 30, 2000

	<u>2000</u>
<b>Receipts:</b>	
Contributions	\$ 183,815,000
Investment income (loss)	<u>3,912,399</u>
Total receipts	<u>187,727,399</u>
<b>Expenditures:</b>	
Grants	7,017,766
Operating expenses	<u>1,742,668</u>
Total expenditures	<u>8,760,434</u>
Receipts over expenditures	178,966,965
Fund balance, beginning of year	<u>38,074,303</u>
<b>Fund balance, end of year</b>	<b><u>\$ 217,041,268</u></b>

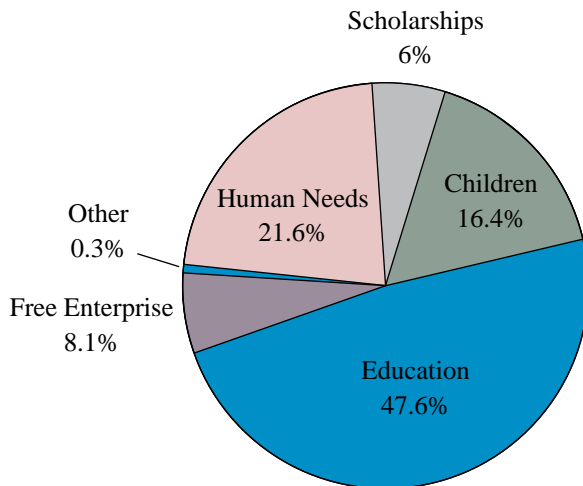
*The above financial statements represent an excerpt of the financial statements that were reviewed by Arthur Andersen LLP.*

# 2000 Grantmaking Summary

## Mathile Family Foundation

Focus Area	Number of Grants Awarded	Dollars Awarded
Children	49	\$1,148,075
Education	40	3,342,445
Free Enterprise Education	12	568,000
Meeting Basic Human Needs	49	1,515,900
Scholarships	19	419,505
Other	2	20,000
<b>Total 2000 Grants Awarded</b>	<b>171</b>	<b>\$7,013,925</b>

### 2000 Percentage of Dollars Awarded by Focus Area



# Guidelines

## Mathile Family Foundation

### Mission

To provide resources to organizations that demonstrate best practices in helping men, women and children reach their full potential.

### Areas of Concentration

The Mathile Family Foundation has decided the best way to meet its mission is to concentrate its resources in three main areas:

- Children
- Education
- Meeting Basic Human Needs

### Grant Awards

- Geographic priority:
  - 1) Dayton area
  - 2) All others
- Multi-year requests: up to three years
- Size of grant: Min. \$1,000; Max. \$250,000  
*Size as percentage of grantee's budget: 10 percent (exceptions granted for special circumstances).*
- Organizations requesting funds must be tax exempt under Internal Revenue Code Section 501(c)(3)
- Notification is 70 days after deadline
- No mass mailings or endowment requests

### Types of Projects Supported

The Mathile Family Foundation will support projects of medium to high risk and purchases that meet the Foundation mission and areas of interest.

The Foundation will also fund, on occasion, scholarships, building funds and operating expenses that meet the Foundation mission and areas of interest. However, they will be granted under special circumstances and on a case-by-case basis.

### Proposals

1. Initial inquiry can be by phone or letter describing the scope of the project
2. Only one copy is needed; please do not provide a plastic bound or expensively produced copy
3. Proposal content should be a maximum of three pages and include the following:
  - A summary of the organization, including:
    - History and purpose
    - Services provided, service area and statistics
    - Profile of the clients served
  - A description of the proposed project, including:
    - Background information on the project and the need that will be addressed
    - Brief description of how you will measure the success of the project
    - Total dollar amount requested and project budget
    - Pending and committed financial contributors to the project

## Proposals (cont.)

4. Please include one copy of the following supporting documentation:

- Cover letter signed by the chief executive officer and board chair
- Board of trustees
- Copy of the IRS determination letter verifying tax-exempt status
- Most recent Form 990 or 990-PF
- List of major financial contributors
- Audited financial statements for prior year-end
- Current financial statements, including:
  - Balance sheet
  - Income statement
  - Cash flow statement
- Budgets for the preceding and current years
- Most recent annual report
- Business plan, if available

## Proposal Deadlines:

February 1, May 1, August 1, November 1

***If you have questions or wish to submit a proposal, please write or call:***

### **Mathile Family Foundation**

P.O. Box 13615 DAYTON, OHIO 45413-0615

PHONE 937 264-4600 FAX 937 264-4635