

**The Union City  
Community Foundation's  
2015 Annual Report**





“Giving is not just about making a donation.  
It is about making a difference.”

-Kathy Calvin

*President of the United Nations Foundation*

## *Letter From The Chairman*

The Union City community has a great deal of wonderful people who truly care about one another. We are always ready to help in time of need and we continually surpass the odds of success. Over the years, we continue to build to become a more focused and energized community.

I am pleasantly amazed at the generous individuals from the Union City area. These dedicated individuals are willing to give their unique gift: volunteer of time, abilities, or their financial resources. The volunteers are willing to give for cause when called upon. All of these are valuable gifts, which help build a much stronger community.

Currently we are in the process of creating the Ottaway Legacy Society so that giving individuals can designate their financial resources in their estate planning, wills, trusts, IRA/401K, annuities, or life insurance policy. This will protect and preserve the vitality of our Union City Community. By joining, members agree to be listed in the Union City Community Foundation Annual Report and other publications. Amounts are anonymous and have no minimum! It is our goal to help you learn more about this opportunity and most importantly....joining will be simple.

You can provide a permanent gift by creating your personal named fund or by donating to an existing fund...*this is truly a gift that keeps on giving!*

**Please contact: Susannah Frigon, Vice President of Investor Relations of The Erie Community Foundation [SFrigon@eriecommunityfoundation.org](mailto:SFrigon@eriecommunityfoundation.org) or by phone 814-454-0843 Ext. 105**

As a board, we strive to improve the visibility and effectiveness of the Union City Community Foundation. Your gift will be a legacy that will benefit future generations in making your dreams become a reality.

Your continued support is crucial to our community's future success!

Please contact me with any further questions you may have about your Union City Community Foundation.

Thank you,

R. Steven Jones, UCCF Chairman

[steve@ronjoneshardwood.com](mailto:steve@ronjoneshardwood.com)

814-438-7622

## ***2015 Funded Organizations***



- Camp Halo / Doorkeepers Christian Outreach – Camp Shoes
- Eligin Beaverdam Hose Co – Gas Detection Equipment
- Amanda’s Notary / Grady’s Decision – EGGStravaganza
- Lions Club – Pavilion Landscaping & Christmas Lights
- Lunch with Santa / UCASDF – Food and Gifts
- Main Street Art Center / UCASDF – Web and Internet
- St. Vincent Outpatient Center – Building Upgrades
- Union City Area School District Foundation –Security Upgrades
- Union City Area School District Foundation – Visual Arts Cameras
- Union City Family Support Center – Infrastructure Improvements
- Union City Healthy Youth Club/UCASDF – Club Marathon
- Union City Police Department / UCCHA – Tasers
- Union City Pride, Inc. – Higby Building
- Parks & Recreation / Union City Pride, Inc. – PLAY Camp
- Union City Prom to Dawn / UCASDF – 2015 Prizes
- Union City Public Library – Computer Purchase
- Union City Public Library – Pre-K Transportation
- United Way of Erie County—Erie Free Taxes



## ***Statement of Financial Position***

as of December 31, 2015

### **ASSETS**

Cash and Investments	\$3,387,517
<b>Total</b>	<b>\$3,387,517</b>

### **LIABILITIES**

Grants and Accounts Payable	\$ 27,508
<b>Total</b>	<b>\$ 27,508</b>

### **CHANGE IN NET ASSETS**

<b>Decrease in Net Assets</b>	<b>\$ (210,498)</b>
<b>Beginning Net Assets</b>	<b>\$3,570,507</b>
<b>Ending Net Assets</b>	<b>\$3,360,009</b>



## ***Statement of Revenue, Expenses and Grants Paid***

for the Year Ending December 31, 2015

### **REVENUES**

Public Support - Gifts and Bequests	\$ 14,199
Net Investment Income	\$ (57,579)
Other Income	\$ 1,405
<b>Total</b>	<b>\$ (41,975)</b>

### **EXPENDITURES**

Grants and Awards	\$ 110,621
Administrative and Development Expenses	\$ 39,243
Fees to Investment Managers	\$ 18,659
<b>Total</b>	<b>\$ 168,523</b>

## ***“I Believe” Award***

In 2009 we instituted what has become an annual “marquee” award to honor individuals, group and organizations that work to make the Union City area a better place to live. The idea of the award is to honor anybody who steps outside of the box and does what they have to do to make our community a better place to live, work and raise a family.

**2016** - Larry Obert

**2015** - Union City Downtown Development

**2014** - Dr. Rogelio Allanigue

**2013** - Union City Pride, Inc.

**2012** - Christopher Lash

**2011** - Union City Volunteer Fire Department

**2010** - Mark Webb

**2009** - Union City Little League



*Geographic*

Harold Y. & Dorothy L. Cooper  
David C. & Autumn L. Hoffman

*Agency Endowment*

LaRue Ottaway/St. Vincent Health Center  
Donald E. Barteldt Memorial

*Unrestricted*

Carl R. Brown  
Ronald and Sally Jones - Fund II  
UCCF Board of Directors  
Union City Community Foundation General Fund

*Donor Advised*

Ronald and Sally Jones - Fund I  
Stanley C. and Helen L. Bishop

*Scholarship Fund*

Jasper Drake  
Edward Margie Memorial  
Jenine Mineo Memorial

## *Create Your Legacy*

Through The Union City Community Foundation, you can create a personal philanthropic legacy tailored to your specific needs and interests. Funds may be established during your lifetime or by bequest in your will. Grants are then awarded to your favorite charities in the name of the fund, forever.

**Unrestricted Funds** are ideal funds if you have broad charitable interests and a vision for the future. If you choose this fund, you offer The Union City Community Foundation maximum flexibility to respond to the changing needs in the community.

**Donor Designated Funds** are created to perpetually benefit one or more specific charities of your choosing. Grants will be made in the name of the fund so long as the organization remains in operation and is consistent with its original charitable purpose.

**Donor Advised Funds** are an attractive alternative to the creation of a private foundation because your donor advised fund receives a 100 percent tax deduction for your original and any future gifts. In future years, you may suggest deserving charities to benefit from fund income, or, if desired, principal. Grants are then made in the name of the fund to your favorite charities.

**Geographic Funds** are designed for when your charitable interests are limited to a particular geographic area within Erie County.

**Scholarships Funds** support students who are attending or graduating from a particular school or studying a specific subject. Each scholarship is unique. You can design your scholarship fund in memory or in honor of a loved one with specific parameters.

**Field of Interest Funds** are perfect if you wish to support a particular broad charitable cause, such as education, the arts, health, environment, human services or community development.

**Pass-Through Funds** allow a gift to The Union City Community Foundation to "pass through" to your favored charity. This may be appropriate when you want anonymity, or when unique property is used to make a gift.

**Annuities and Trusts** are available, at no cost, to organizations with Agency Endowments. We also have significant experience with charitable remainder and lead trusts. These planned giving alternatives often create beneficial situations for both you and your favorite nonprofits.

**How to include the Foundation in your will** A bequest to The Union City Community Foundation is simply including us in your will or estate plans. Your legal counsel may include language similar to the following:

"I give, devise and bequeath the following:

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(Describe assets that are the subject of the bequest: for example, a stated sum, the residue of the estate, or a percentage of the residue of the estate.)

to the Union City Community Foundation, a Pennsylvania nonprofit corporation.  
This gift shall be known as the \_\_\_\_\_ Fund."

(the name you choose)

If it is desired that the bequest be applied to an area of charitable interest or to specific organizations, add "this Fund shall be devoted to the support of

\_\_\_\_\_  
(name of favorite charity)

”

## ***BOARD OF TRUSTEES—2016***

R. Steven Jones, Chairman	Kyle Blakeslee, Vice Chairman
Diane Bowes, Secretary	Larry Obert, Treasurer
Dr. Rogelio Allanigue	Abigail Biebel
Pat Burgess	Darrell Cooper
Gerald Eddy	Shawn Gross
Ronald O. Jones	Tara Lineman
Jim Shreve	Henry Ward
Mark Webb	Scott Whalen, Ph.D.
Richard Mason - Emeritus Class	
Norman Troyer - Emeritus Class	
Kaylynn Ostergard, Administrative Assistant	



The Union City  
Community  
Foundation

*Dedicated to serving the people of the Union City area.*

P.O. Box 512  
Union City, PA 16438  
(814) 438-7622  
[www.UnionCityCF.org](http://www.UnionCityCF.org)

***Affiliated with the Erie Community Foundation***

A copy of our official nonprofit registration may be obtained from the Pennsylvania Department of State by calling toll-free, within Pennsylvania, 1-800-732-0999. Registration does not imply endorsement.