

## *Mission of the UAEF*

The Upper Arlington Education Foundation was incorporated November 20, 1985 as a not-for-profit organization with independent tax exempt status. Our mission is to fund and support programs, materials, and opportunities that maintain, strengthen or enrich our students' environment and educational experiences, the expenses of which exceed the budget of the Upper Arlington City School District.

UAEF Trustees pledge:

- to give full consideration to all grant requests and fund them on an equitable basis, practicing fiscal responsibility,
- to ensure funded grants requests are consistent with the mission and strategies of the Upper Arlington Schools, and
- to be careful stewards of foundation funds.

## *Foundation Gifts*

An initial gift of \$10,000 from an Upper Arlington family along with 35 additional generous gifts launched the Education Foundation.

Gifts in any amount are welcomed and appreciated. Ways to give include direct gifts, stocks, planned giving, and living endowments. Memorials and gifts of recognition are made to the UAEF by many parents and alumni. If total donations made in memory of a person exceed \$1,000, that person's name is included in the category of "Permanent Memorials" in our publications. For persons wishing to establish a new endowment fund for a specific purpose

at the UAEF, a minimum donation of \$10,000 is required. It is the trustees' wish to keep UAEF money in the school district, so any new fund must benefit current staff and students.

Each year on the Sunday night of Labor Day weekend, the UAEF holds its annual fundraiser, *The Golden Bear Bash!* to benefit the General Unrestricted Fund from which grants are made to student and staff. Additionally, ongoing fundraising campaigns solicit alumni, parents of current students, and the community at large for donations. Informational presentations about the UAEF are made to parent-teacher organizations, service clubs, and senior citizens in our community. If you wish to have a UAEF member speak to your organization, please contact our offices.

## *Current Assets*

Assets of the Education Foundation as of December 31, 2011 are \$1,245,000. These monies are held in two accounts: Cash in the Arlington Bank, and marketable securities at Charles Schwab under the supervision of Hamilton Capital Management. In addition, the Foundation has deferred gifts of \$500,000.

## *Grants Process*

The Grants Committee is made up of UAEF trustees and ad hoc members. Grant applications are available from the UAEF office or online and are reviewed monthly. In order for a grant to be considered, applicants are asked to submit their request by Thursday at 3:00 pm one week before the regularly scheduled UAEF monthly meeting giving the grants committee enough time to review the application and then make funding recommendations to the UAEF

Board at the monthly full board meeting.

The Education Foundation's first grants were processed in April, 1987. Since then, the UAEF has disbursed more than \$2.5 million to the students, staff, and schools in the form of grants, scholarships, and capital improvement projects. Many of these grants were partnerships with PTOs, Rotary clubs, and private organizations.

## *The UAEF*

The Upper Arlington Education Foundation Board of Trustees believes that no greater legacy can be created for future generations than a permanent fund which is designated solely for the purpose of exemplary public education in our community. The Foundation offers an opportunity for alumni, parents, and friends to make gifts that continue to give.

Thank you for considering a gift to the Upper Arlington Education Foundation which will impact the lives of students in our community for generations to come.

FOR MORE INFORMATION, PLEASE VISIT  
OUR WEB SITE

[UAEducationFoundation.com](http://UAEducationFoundation.com)

*Want to help the UAEF  
fulfill our mission?*

*Then be a part of  
this year's*



*Sunday, September 2, 2012*

For general information  
about the *Bash!*  
and for tickets,  
sponsorship opportunities,  
and auction donation  
information, please visit

**GoldenBearBash.com**



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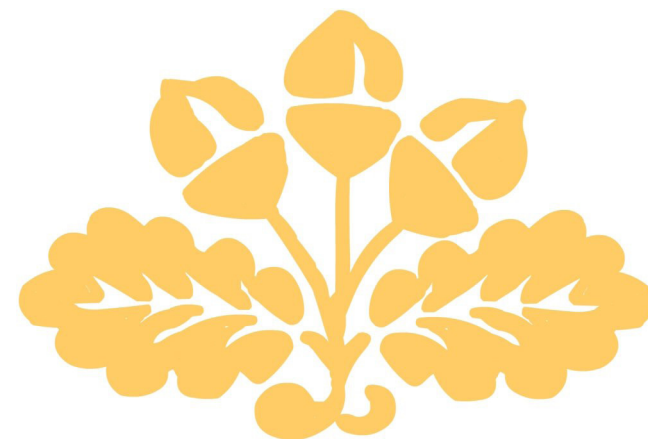
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### **Upper Arlington Education Foundation**

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**Upper Arlington  
Education Foundation**

Established 1985

