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Form **990-PF**Department of the Treasury
Internal Revenue Service**Return of Private Foundation**
or Section 4947(a)(1) Nonexempt Charitable Trust
Treated as a Private Foundation

Note. The foundation may be able to use a copy of this return to satisfy state reporting requirements

OMB No 1545-0052

2010

For calendar year 2010, or tax year beginning

, 2010, and ending

, 20

G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return
☐ Amended return ☐ Address change ☐ Name change

Name of foundation

The Westfield Insurance Foundation

A Employer identification number

20-3816760

Number and street (or P O box number if mail is not delivered to street address)

PO Box 5001

Room/suite

B Telephone number (see page 10 of the instructions)

City or town, state, and ZIP code

Westfield Center, OH 44251-5001

C If exemption application is pending, check here ☐D 1. Foreign organizations, check here ☐2. Foreign organizations meeting the 85% test, check here and attach computation ☐E If private foundation status was terminated under section 507(b)(1)(A), check here ☐F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐H Check type of organization: ☒ Section 501(c)(3) exempt private foundation☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundationI Fair market value of all assets at end of year (from Part II, col. (c), line 16) **\$ 13,428,030**J Accounting method: ☐ Cash ☒ Accrual
☐ Other (specify) _____
(Part I, column (d) must be on cash basis.)**Part I****Analysis of Revenue and Expenses** (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions))

	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue				
1 Contributions, gifts, grants, etc., received (attach schedule)	Sch #1 50,000			
2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B				
3 Interest on savings and temporary cash investments				
4 Dividends and interest from securities	330,497	330,497		
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	(69,618)			
b Gross sales price for all assets on line 6a	1,446,067			
7 Capital gain net income (from Part IV, line 2)				
8 Net short-term capital gain				
9 Income modifications				
10a Gross sales less returns and allowances				
b Less: Cost of goods sold				
c Gross profit or (loss) (attach schedule)				
11 Other income (attach schedule)				
12 Total. Add lines 1 through 11	310,879	330,497		
Operating and Administrative Expenses				
13 Compensation of officers, directors, trustees, etc.				
14 Other employee salaries and wages				
15 Pension plans, employee benefits				
16a Legal fees (attach schedule)				
b Accounting fees (attach schedule)				
c Other professional fees (attach schedule)	Sch #2 3,451			
17 Interest				
18 Taxes (attach schedule) (see page 14 of the instructions)				
19 Depreciation (attach schedule) and depletion				
20 Occupancy				
21 Travel, conferences, and meetings				
22 Printing and publications				
23 Other expenses (attach schedule)				
24 Total operating and administrative expenses. Add lines 13 through 23	3,451			
25 Contributions, gifts, grants paid	319,622			610,000
26 Total expenses and disbursements. Add lines 24 and 25	323,073			610,000
27 Subtract line 26 from line 12:				
a Excess of revenue over expenses and disbursements	(12,194)			
b Net investment income (if negative, enter -0-)		330,497		
c Adjusted net income (if negative, enter -0-)				

For Paperwork Reduction Act Notice, see page 30 of the instructions.

Cat No 11289X

Form **990-PF** (2010)

SCANNED MAY 20 2011

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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)		Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	See Schedule #3	4,833	44,882	44,882
	2	Savings and temporary cash investments	See Schedule #3	97,708	36,156	36,156
	3	Accounts receivable ▶				
		Less: allowance for doubtful accounts ▶				
	4	Pledges receivable ▶				
		Less: allowance for doubtful accounts ▶				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)				
	7	Other notes and loans receivable (attach schedule) ▶				
		Less: allowance for doubtful accounts ▶				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10a	Investments—U.S. and state government obligations (attach schedule) Sch #3	3,545,470	3,321,347	3,321,347	
	b	Investments—corporate stock (attach schedule) Schedule #3	8,555,984	10,006,894	10,006,894	
	c	Investments—corporate bonds (attach schedule)				
	11	Investments—land, buildings, and equipment: basis ▶				
	Less: accumulated depreciation (attach schedule) ▶					
12	Investments—mortgage loans					
13	Investments—other (attach schedule)					
14	Land, buildings, and equipment: basis ▶					
	Less: accumulated depreciation (attach schedule) ▶					
15	Other assets (describe ▶ <u>Accrued Investment Income</u>)	8,215	18,751	18,751		
16	Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	12,212,210	13,428,030	13,428,030		
Liabilities	17	Accounts payable and accrued expenses				
	18	Grants payable	1,641,392	1,351,014		
	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable (attach schedule)				
	22	Other liabilities (describe ▶)				
	23	Total liabilities (add lines 17 through 22)	1,641,392	1,351,014		
Net Assets or Fund Balances		Foundations that follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted	10,570,818	12,077,016		
	25	Temporarily restricted				
	26	Permanently restricted				
		Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds				
	28	Paid-in or capital surplus, or land, bldg., and equipment fund				
	29	Retained earnings, accumulated income, endowment, or other funds				
30	Total net assets or fund balances (see page 17 of the instructions)	10,570,818	12,077,016			
31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	12,212,210	13,428,030			

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	10,570,818
2	Enter amount from Part I, line 27a	2	(12,194)
3	Other increases not included in line 2 (itemize) ▶ <u>Unrealized Gain</u>	3	1,518,392
4	Add lines 1, 2, and 3	4	12,077,016
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	12,077,016

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	See Schedule #4			
b				
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			
b			
c			
d			
e			

2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	(69,618)
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions). If (loss), enter -0- in Part I, line 8	3	

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No
 If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2009	510,274	10,625,897	.04802
2008	922,095	11,782,962	.07826
2007	810,202	16,343,875	.04957
2006	298,579	5,213,925	.05727
2005	0	80,806	.00000

2	Total of line 1, column (d)	2	.23312
3	Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	.04662
4	Enter the net value of noncharitable-use assets for 2010 from Part X, line 5	4	12,176,649
5	Multiply line 4 by line 3	5	567,675
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	3,305
7	Add lines 5 and 6	7	570,980
8	Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions on page 18.	8	610,000

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary—see instructions)			
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b			
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).			
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			0
3	Add lines 1 and 2			3,305
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			0
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-			3,305
6	Credits/Payments:			
a	2010 estimated tax payments and 2009 overpayment credited to 2010	6a	3,100	
b	Exempt foreign organizations—tax withheld at source	6b		
c	Tax paid with application for extension of time to file (Form 8868)	6c		
d	Backup withholding erroneously withheld	6d		
7	Total credits and payments. Add lines 6a through 6d			3,100
8	Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached			
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed			205
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid			
11	Enter the amount of line 10 to be: Credited to 2011 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>			

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		✓
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? <i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.</i>		✓
c Did the foundation file Form 1120-POL for this year?		✓
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ▶ \$ _____ (2) On foundation managers. ▶ \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>		✓
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes.</i>		✓
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		✓
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>		✓
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	✓	
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV</i>	✓	
8a Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ▶ <u>Ohio</u>		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation</i>	✓	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2010 or the taxable year beginning in 2010 (see instructions for Part XIV on page 27)? <i>If "Yes," complete Part XIV</i>		✓
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>	✓	

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions)	11		✓
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		✓
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	✓	
Website address ▶ <u>www.guidestar.org</u>				
14	The books are in care of ▶ <u>Westfield Group</u> Telephone no. ▶ <u>330-887-6907</u>			
Located at ▶ <u>PO Box 5001, Westfield Center, OH</u> ZIP+4 ▶ <u>44251-5001</u>				
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041—Check here. ▶ <input type="checkbox"/>			
and enter the amount of tax-exempt interest received or accrued during the year ▶ <u>15</u>				
16	At any time during calendar year 2010, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16	Yes	No
See page 20 of the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ▶				✓

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required**File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.**

		Yes	No
1a	During the year did the foundation (either directly or indirectly):		
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6)	Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 22 of the instructions)?	1b	
Organizations relying on a current notice regarding disaster assistance check here ▶ <input type="checkbox"/>			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2010?	1c	✓
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a	At the end of tax year 2010, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2010? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see page 22 of the instructions.)	2b	✓
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ▶ 20____, 20____, 20____, 20____		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If "Yes," did it have excess business holdings in 2010 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2010.)	3b	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	✓
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2010?	4b	✓

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)**5a** During the year did the foundation pay or incur any amount to:(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions) ☐ Yes ☒ No(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No**b** If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)? **5b**Organizations relying on a current notice regarding disaster assistance check here ☐ **5b****c** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☒ No

If "Yes," attach the statement required by Regulations section 53.4945–5(d).

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? **6b** ☒

If "Yes" to 6b, file Form 8870.

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No**b** If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? **7b****Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors****1** List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (if not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Schedule #8				

2 Compensation of five highest-paid employees (other than those included on line 1—see page 23 of the instructions). If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
None				

Total number of other employees paid over \$50,000 ☐

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors *(continued)***3** Five highest-paid independent contractors for professional services (see page 23 of the instructions). If none, enter "NONE."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
None		

Total number of others receiving over \$50,000 for professional services ▶

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

	Expenses
1 None	
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see page 24 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2

	Amount
1 None	
2	
All other program-related investments. See page 24 of the instructions	
3	

Total. Add lines 1 through 3 ▶

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see page 24 of the instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	See Schedule #5	1a 12,337,223
b	Average of monthly cash balances	See Schedule #5	1b 24,857
c	Fair market value of all other assets (see page 25 of the instructions)		1c 0
d	Total (add lines 1a, b, and c)		1d 12,362,080
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	12,362,080
4	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see page 25 of the instructions)	4	185,431
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	12,176,649
6	Minimum investment return. Enter 5% of line 5	6	608,832

Part XI Distributable Amount (see page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6	1	608,832
2a	Tax on investment income for 2010 from Part VI, line 5	2a	3,305
b	Income tax for 2010. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	3,305
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	605,527
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	605,527
6	Deduction from distributable amount (see page 25 of the instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	605,527

Part XII Qualifying Distributions (see page 25 of the instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26	1a	610,000
b	Program-related investments—total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	610,000
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see page 26 of the instructions)	5	3,305
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	606,695

Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

Part XIII Undistributed Income (see page 26 of the instructions)

	(a) Corpus	(b) Years prior to 2009	(c) 2009	(d) 2010
1 Distributable amount for 2010 from Part XI, line 7				605,527
2 Undistributed income, if any, as of the end of 2010:				
a Enter amount for 2009 only			0	
b Total for prior years. 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2010:				
a From 2005				
b From 2006 22,116				
c From 2007 1,136				
d From 2008 341,457				
e From 2009 0				
f Total of lines 3a through e	364,709			
4 Qualifying distributions for 2010 from Part XII, line 4: ► \$ 610,000				
a Applied to 2009, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see page 26 of the instructions)		0		
c Treated as distributions out of corpus (Election required—see page 26 of the instructions)				
d Applied to 2010 distributable amount				605,527
e Remaining amount distributed out of corpus	4,473			
5 Excess distributions carryover applied to 2010 (If an amount appears in column (d), the same amount must be shown in column (a).)	0			0
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	369,182			
b Prior years' undistributed income. Subtract line 4b from line 2b		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0		
d Subtract line 6c from line 6b. Taxable amount—see page 27 of the instructions		0		
e Undistributed income for 2009. Subtract line 4a from line 2a. Taxable amount—see page 27 of the instructions			0	
f Undistributed income for 2010. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2011				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)	0			
8 Excess distributions carryover from 2005 not applied on line 5 or line 7 (see page 27 of the instructions)	0			
9 Excess distributions carryover to 2011. Subtract lines 7 and 8 from line 6a	369,182			
10 Analysis of line 9:				
a Excess from 2006 22,116				
b Excess from 2007 1,136				
c Excess from 2008 341,457				
d Excess from 2009 0				
e Excess from 2010 4,473				

Part XIV Private Operating Foundations (see page 27 of the instructions and Part VII-A, question 9)

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2010, enter the date of the ruling ▶

b Check box to indicate whether the foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

	Prior 3 years				(e) Total
	(a) 2010	(b) 2009	(c) 2008	(d) 2007	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test—enter:					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test—enter $\frac{2}{3}$ of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test—enter:					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year—see page 28 of the instructions.)

1 Information Regarding Foundation Managers:

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000). (See section 507(d)(2).)

Ohio Farmers Insurance Co through 100% owned subsidiaries, Westfield Insurance Co. & Westfield National Insurance Co.

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

None

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a The name, address, and telephone number of the person to whom applications should be addressed:

See attached Community Grant Fund Guidelines

b The form in which applications should be submitted and information and materials they should include:

See attached Community Grant Fund Guidelines

c Any submission deadlines:

See attached Community Grant Fund Guidelines

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:

See attached Community Grant Fund Guidelines

Part XV Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a <i>Paid during the year</i> See Schedule #6				610,000
Total			3a	610,000
b <i>Approved for future payment</i> See Schedule #7				1,800,000
Total			3b	1,800,000

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

Enter gross amounts unless otherwise indicated.		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See page 28 of the instructions)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1	Program service revenue:					
a						
b						
c						
d						
e						
f						
g	Fees and contracts from government agencies					
2	Membership dues and assessments					
3	Interest on savings and temporary cash investments					
4	Dividends and interest from securities			14	330,497	
5	Net rental income or (loss) from real estate:					
a	Debt-financed property					
b	Not debt-financed property					
6	Net rental income or (loss) from personal property					
7	Other investment income					
8	Gain or (loss) from sales of assets other than inventory			18	(69,618)	
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory					
11	Other revenue: a <u>Contributions</u>			42	50,000	
b	_____					
c	_____					
d	_____					
e	_____					
12	Subtotal. Add columns (b), (d), and (e)				310,879	
13	Total. Add line 12, columns (b), (d), and (e)				310,879	

(See worksheet in line 13 instructions on page 29 to verify calculations.)

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

[illegible]

Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

- | | | | |
|----------|--|--------------|-----------|
| 1 | Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations? | Yes | No |
| a | Transfers from the reporting foundation to a noncharitable exempt organization of: | | |
| | (1) Cash | 1a(1) | ✓ |
| | (2) Other assets | 1a(2) | ✓ |
| b | Other transactions: | | |
| | (1) Sales of assets to a noncharitable exempt organization | 1b(1) | ✓ |
| | (2) Purchases of assets from a noncharitable exempt organization | 1b(2) | ✓ |
| | (3) Rental of facilities, equipment, or other assets | 1b(3) | ✓ |
| | (4) Reimbursement arrangements | 1b(4) | ✓ |
| | (5) Loans or loan guarantees | 1b(5) | ✓ |
| | (6) Performance of services or membership or fundraising solicitations | 1b(6) | ✓ |
| c | Sharing of facilities, equipment, mailing lists, other assets, or paid employees | 1c | ✓ |
| d | If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received. | | |

[illegible]

- 2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No
- b** If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship

**Sign
Here**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct and complete. Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge.

Signature of officer or trustee

Date _____

Director
Title

**Paid
Preparer
Use Only**

Print/Type preparer's name

Preparer's signature

Date

Check ☐ if self-employed

PTIN

Firm's name ▶

Firm's EIN ▶

Firm's address ►

Phone no

Schedule B(Form 990, 990-EZ,
or 990-PF)Department of the Treasury
Internal Revenue Service**Schedule of Contributors**

▶ Attach to Form 990, 990-EZ, or 990-PF.

OMB No 1545-0047

2010**Name of the organization**

The Westfield Insurance Foundation

Employer identification number

20-3816760

Organization type (check one):**Filers of:****Section:**

Form 990 or 990-EZ

- ☐ 501(c)() (enter number) organization
- ☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
- ☐ 527 political organization

Form 990-PF

- ☒ 501(c)(3) exempt private foundation
- ☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
- ☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.**Note.** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.**General Rule**

- ☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II.

Special Rules

- ☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3 % support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, aggregate contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not aggregate to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year ▶ \$

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2 of its Form 990, or check the box on line H of its Form 990-EZ, or on line 2 of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization

Employer identification number

The Westfield Insurance Foundation

20-3816760

Part I Contributors (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	Westfield Group Foundation One Park Circle, P.O. Box 5001 Westfield Center, OH 44251	\$ 50,000	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)

WESTFIELD INSURANCE FOUNDATION
EIN 20-3816760
2010 990-PF
SCHEDULE 1

Part I, Line 1: Contributions Received

	<u>Donation Date</u>	<u>Cash Received</u>
Westfield Group Foundation	8/10/2010	\$ 50,000.00

WESTFIELD INSURANCE FOUNDATION
EIN 20-3816760
2010 990-PF
SCHEDULE 2

Part I, Line 16c: Other professional fees

Regulatory Fees	\$ 3,426.00
Policy Filing Fees	<u>25.00</u>
Total Other Professional Fees	<u><u>\$ 3,451.00</u></u>

WESTFIELD INSURANCE FOUNDATION
EIN 20-3816760
2010 990-PF
SCHEDULE 3

	Beginning of Year	End of Year	
	Book Value	Book Value	Fair
	(End of Year	(End of Year	Market
	Market Value)	Market Value)	Value
	12/31/2009	12/31/2010	12/31/2010
	(column a)	(column b)	(column c)
Part II, Line 2: Savings & Temporary Cash Investments:			
JP Morgan US Govt Institutional	97,708	36,156	36,156
Part II, Line 10a: Investments - US and State Government Obligations:			
Ishares - (Lehman)Barclays TIPS Bd Fd	592,230	688,128	688,128
Ishares - GS\$ Investop Corp Bd	1,171,688	1,333,812	1,333,812
Ishares - (Lehman) Barclays 7-10 Yr Treasury Bd Fd	1,134,080	1,299,407	1,299,407
Ishares - DJ US Real Estate	647,472	-	-
	<u>3,545,470</u>	<u>3,321,347</u>	<u>3,321,347</u>
Part II, Line 10b: Investments - Corporate Stock:			
Ishares - MSCI EAFE Index Fund	2,284,999	2,546,252	2,546,252
Ishares - Russell 1000 Value - Large Cap	1,816,710	1,994,753	1,994,753
Ishares - Russell 1000 Growth - Large Cap	1,370,875	1,465,856	1,465,856
Ishares - Russell 2000 Growth - Small Cap	510,525	528,891	528,891
SPDR TR - Unit Ser 1 Standard & Poors	1,551,245	1,737,865	1,737,865
SPDR SER TR - DJ Wilshire Small Cap Val	1,021,630	1,072,950	1,072,950
Ishares - DJ US Real Estate	-	660,328	660,328
	<u>8,555,984</u>	<u>10,006,894</u>	<u>10,006,894</u>

WESTFIELD INSURANCE FOUNDATION
EIN 20-3816760
2010 990-PF
SCHEDULE 4

Part IV: Capital Gains and Losses for Tax on Investment Income

# Shares	Property Description	How Acquired	Date Acquired	Date Sold	Sales Price	Cost	Gain/ (Loss)
400	Ishares Barclays TIPS BD FD	Purchase	4/7/10	6/11/2010	42,135 09	41,586 00	549 09
450	Ishares GS\$ Investop Corp Bd	Purchase	1/10/06	6/11/2010	47,553 97	48,584 25	(1,030 28)
550	Ishares GS\$ Investop Corp Bd	Purchase	12/21/2006	6/11/2010	58,121 54	59,432 67	(1,311 13)
650	Ishares Barclays 7-10 yr Treas BD FD	Purchase	9/9/2009	6/11/2010	60,515 87	59,196 15	1,319 72
800	Ishares Barclays 7-10 yr Treas BD FD	Purchase	10/22/2009	6/11/2010	74,481 06	73,342 40	1,138 66
700	Ishares MSCI EAFE Index Fund	Purchase	10/29/2008	11/8/2010	40,952 81	29,865 50	11,087 31
2,700	Ishares MSCI EAFE Index Fund	Purchase	10/31/2008	11/8/2010	157,960 82	119,324 88	38,635 94
200	Ishares MSCI EAFE Index Fund	Purchase	4/16/2007	12/28/2010	11,493 80	15,915 00	(4,421 20)
900	Ishares Russell 1000 Value-Large Cap	Purchase	6/26/2007	12/28/2010	58,175 55	78,367 95	(20,192 40)
300	Ishares Russell 1000 Growth-Large Cap	Purchase	4/16/2007	12/28/2010	17,129 71	17,287 50	(157 79)
1,600	Ishares Russell 1000 Growth-Large Cap	Purchase	6/26/2007	12/28/2010	91,358 45	94,904 00	(3,545 55)
500	Ishares Russell 2000 Growth-Small Cap	Purchase	6/26/2007	6/11/2010	34,697 66	42,617 50	(7,919 84)
100	Ishares Russell 2000 Growth-Small Cap	Purchase	4/16/2007	12/1/2010	8,333 12	8,404 50	(71 38)
500	Ishares Russell 2000 Growth-Small Cap	Purchase	6/26/2007	12/1/2010	41,665 59	42,617 50	(951 91)
350	Ishares Russell 2000 Growth-Small Cap	Purchase	4/16/2007	12/28/2010	30,767 97	29,415 75	1,352 22
200	Ishares - DJ US Real Estate	Purchase	12/21/2006	6/10/2010	10,014 89	16,559 00	(6,544 11)
1,500	Ishares - DJ US Real Estate	Purchase	4/16/2007	6/10/2010	75,111 67	128,932 50	(53,820 83)
600	Ishares - DJ US Real Estate	Purchase	10/29/2008	11/8/2010	34,299 43	23,324 40	10,975 03
600	SPDR Tr - Unit Ser 1 Standard & Poors	Purchase	6/26/2007	12/28/2010	75,286 72	90,045 00	(14,758 28)
100	SPDR Ser Tr - DJ Wilshire Small Cap	Purchase	12/21/2006	4/7/2010	6,424 33	7,036 50	(612 17)
1,500	SPDR Ser Tr - DJ Wilshire Small Cap	Purchase	6/26/2007	4/7/2010	96,364 97	111,937 50	(15,572 53)
800	SPDR Ser Tr - DJ Wilshire Small Cap	Purchase	12/21/2006	12/1/2010	52,614 87	56,292 00	(3,677 13)
100	SPDR Ser Tr - DJ Wilshire Small Cap	Purchase	12/21/2006	12/28/2010	6,946 88	7,036 50	(89 62)
51,130	JP Morgan US Govt Institutional	Purchase	8/26/2009	4/30/2010	51,129 87	51,129 87	-
29,204	JP Morgan US Govt Institutional	Purchase	9/30/2009	4/30/2010	29,203 82	29,203 82	-
17,375	JP Morgan US Govt Institutional	Purchase	11/30/2009	4/30/2010	17,374 74	17,374 74	-
7,207	JP Morgan US Govt Institutional	Purchase	1/29/2010	4/30/2010	7,206 52	7,206 52	-
9,370	JP Morgan US Govt Institutional	Purchase	1/29/2010	11/30/2010	9,370 49	9,370 49	-
10,106	JP Morgan US Govt Institutional	Purchase	2/26/2010	11/30/2010	10,106 02	10,106 02	-
27,515	JP Morgan US Govt Institutional	Purchase	3/31/2010	11/30/2010	27,514 98	27,514 98	-
10,139	JP Morgan US Govt Institutional	Purchase	5/28/2010	11/30/2010	10,138 57	10,138 57	-
60,579	JP Morgan US Govt Institutional	Purchase	6/30/2010	11/30/2010	60,579 34	60,579 34	-
59,794	JP Morgan US Govt Institutional	Purchase	6/30/2010	12/31/2010	59,794 36	59,794 36	-
31,241	JP Morgan US Govt Institutional	Purchase	7/30/2010	12/31/2010	31,241 46	31,241 46	-
					1,446,066 94	1,515,685 12	(69,618.18)

WESTFIELD INSURANCE FOUNDATION
EIN 20-3816760
2010 990-PF
SCHEDULE 5

PART X: Minimum Investment Return

Line 1a: Average FMV of Securities

Assets Held More Than One Year

	FMV 1/1/2010	FMV 12/31/2010	AVERAGE FMV 12/31/2010
5,300 shares Ishares - Barclays TIPS Bd Fd	592,230	569,856	581,043
10,250 shares Ishares - GS\$ Investop Corp Bd	1,067,538	1,111,510	1,089,524
11,350 shares Ishares - Barclays 7-10 Yr Treasury Bd Fd	886,000	1,064,857	975,429
11,800 shares Ishares - DJ US Real Estate	647,472	660,328	653,900
37,735 shares Ishares - MSCI EAFE Index Fund	2,284,999	2,196,932	2,240,965
30,750 shares Ishares - Russell 1000 Value - Large Cap	1,765,050	1,994,753	1,879,901
25,600 shares Ishares - Russell 1000 Growth - Large Cap	1,370,875	1,465,856	1,418,366
6,050 shares Ishares - Russell 2000 Growth - Small Cap	510,525	528,891	519,708
13,320 shares SPDR TR - Unit Ser 1 Standard & Poors	1,551,245	1,674,990	1,613,117
15,550 shares SPDR SER TR - DJ Wilshire Small Cap Val	857,490	1,072,950	965,220
			11,937,173

Assets Held Less Than One Year

	DAYS HELD	FMV 12/31/2010	AVERAGE FMV 12/31/2010
500 shares Ishares - Barclays TIPS Bd Fd	269	53,760	39,620
600 shares Ishares - Barclays TIPS Bd Fd	4	64,512	707
600 shares Ishares - GS\$ Investop Corp Bd	269	65,064	47,951
1,450 shares Ishares - GS\$ Investop Corp Bd	4	157,238	1,723
1,000 shares Ishares - Barclays 7-10 Yr Treasury Bd Fd	269	93,820	69,144
1,500 shares Ishares - Barclays 7-10 Yr Treasury Bd Fd	4	140,730	1,542
6,000 shares Ishares - MSCI EAFE Index Fund	204	349,320	195,236
500 shares SPDR TR - Unit Ser 1 Standard & Poors	204	62,875	35,141
2,324 shares JP Morgan US Govt Institutional	154	2,324	981
9,001 shares JP Morgan US Govt Institutional	123	9,001	3,033
7,759 shares JP Morgan US Govt Institutional	93	7,759	1,977
17,072 shares JP Morgan US Govt Institutional	64	17,072	2,993
			400,050

Total on line 1a

12,337,223

Line 1b: Cash Balance Average

	Balance 1/1/2010	Balance 12/31/2010	Average Balance
Total on line 1b	4,833	44,882	24,857

Total on 1d

12,362,080

WESTFIELD INSURANCE FOUNDATION
EIN 20-3816760
2010 990-PF
SCHEDULE 0

Organization	Address	City	ST	Zip Code	Foundation Status of Recipient	Purpose of Grant or Contribution	Amount
Brunswick City Schools	3543 Center Road	Brunswick	OH	44212	Public school	To support Brunswick Schools video program	\$1,000.00
Fair Housing Advocates Association	520 South Main Street	Akron	OH	44311	509(e)(2)	To support radio programs to educate on housing discrimination	\$3,000.00
Fair Housing Center	432 Superior Street	Toledo	OH	43604	509(e)(1)	To support program to aid low income families at risk of foreclosure	\$3,000.00
Farther Renaissance Development Corp	8111 Quincy Avenue	Cleveland	OH	44104	509(e)(1)	To support home buying for low income families	\$1,000.00
Fund for Our Economic Future of Northeast Ohio	1360 East Ninth Street	Cleveland	OH	44114	509(e)(1)	To support economic development efforts in Northeast Ohio	\$34,000.00
Governor's Highway Safety Association	750 1ST St NE	Washington	DC	20002	509(e)(1)	To support driver safety training for teens	\$15,000.00
Habitat for Humanity of Greater Columbus	3140 Westerville Rd	Westerville	OH	43224	509(e)(1)	To purchase building materials for homes for low-income families	\$2,500.00
Habitat for Humanity of Greater Indianapolis	PO Box 1252	Indianapolis	IN	46205	509(e)(1)	To purchase building materials for homes for low-income families	\$2,500.00
Habitat for Humanity of Kent County	539 Van Avenue SW	Grand Rapids	MI	49503	509(e)(1)	To purchase building materials for homes for low-income families	\$2,500.00
Habitat for Humanity of Maumee County	PO Box 2598	Toledo	OH	43606	509(e)(1)	To assist recovery efforts following fire in offices and ReStore	\$500.00
Habitat for Humanity of Medina County	4630 Chippewa Rd	Medina	OH	44256	509(e)(1)	To purchase building materials for homes for low-income families	\$4,500.00
Habitat for Humanity of Northern Fox Valley	20 S. Grove	Carpentersville	IL	60110	509(e)(1)	To purchase building materials for homes for low-income families	\$2,500.00
Habitat for Humanity of Ohio	88 E. Broad Street	Columbus	OH	43215	509(e)(1)	To support 2011 Conference	\$1,000.00
Habitat for Humanity of Summit County	2301 Romig Road	Akron	OH	44306	509(e)(1)	To purchase building materials for homes for low-income families	\$5,000.00
Habitat for Humanity of Summit County	2301 Romig Road	Akron	OH	44306	509(e)(1)	To support capital campaign	\$5,000.00
Habitat for Humanity of Summit County	1451 Spruce St. Ext.	Wooster	OH	44691	509(e)(1)	To purchase building materials for homes for low-income families	\$4,500.00
Heart of Western Michigan United Way	116 Commerce Ave. SW, Suite 100	Grand Rapids	MI	49503	509(e)(1)	To support community-wide needs	\$130.00
Highland Community Health Fair	PO Box 592	Sharon Center	OH	44274	509(e)(2)	To support general needs	\$500.00
Housing Advocates, Inc. (Cleveland)	3214 Prospect Avenue	Cleveland	OH	44115	509(e)(1)	To support 2010 programs to prevent, eliminate & resolve discrimination in housing	\$6,000.00
Housing Advocates, Inc. (Cleveland)	3214 Prospect Avenue	Cleveland	OH	44115	509(e)(1)	To support 2010 programs to prevent, eliminate & resolve discrimination in housing	\$6,000.00
INVEST	127 South Parkway Street	Alexandria	VA	22314	509(e)(2)	To support programs that educate about insurance	\$15,000.00
Junior Achievement of North Central Ohio	1200 Firestone Parkway, 2nd Fl	Akron	OH	44318	509(e)(1)	To support classes in elementary, middle and high school	\$2,500.00
Lancaster Area Habitat for Humanity	443 Fairview Ave	Lancaster	PA	17603	509(e)(1)	To purchase building materials	\$2,500.00
Lodi United Methodist Church	320 Medina St. Ext	Lodi	OH	44254	UMC group exemption	To provide meals for low-income families	\$500.00
Michelle's Leading Star Foundation	4412 Lakewood Glen Drive	Lodi	OH	44256	509(e)(1)	To provide safe driving education in high school health classes	\$5,000.00
Minds Matter	PO Box 14219	Cleveland	OH	44114	509(e)(1)	To support general needs	\$500.00
Neighborhood Housing Services of Greater Cleveland	5700 Broadway Avenue	Cleveland	OH	44127	509(e)(1)	To support home buying education for low-income individuals and families	\$3,000.00
Northwest Ohio Development Agency	432 Superior Street	Toledo	OH	43604	509(e)(1)	To support individual development accounts for low-income individuals to save for a home, education or to start a business	\$3,000.00
Organization for Responsible Care of Animals	610 N. Lurie Street	Lancaster	PA	17602	509(e)(1)	To support general needs	\$500.00
Playhouse Squares Foundation	1501 Euclid Ave Ste 200	Cleveland	OH	44115	509(e)(1)	To support building of broadcast theatre for public television and radio	\$300,000.00
Rebuilding Together Pittsburgh	110 Parkway View Drive	Pittsburgh	PA	15205	509(e)(1)	To provide home repairs to low income families	\$3,900.00
Spanish American Committee	4407 Lorain Avenue	Cleveland	OH	44113	509(e)(1)	To provide home buying support to low income families	\$1,000.00
The Surety Foundation	1101 Connecticut Avenue, NW	Washington	DC	20036	509(e)(1)	To provide scholarships to higher education students studying surety	\$1,000.00
The University of Akron	The University of Akron, Department of Development	Akron	OH	44325	509(e)(1)	To support the advancement council in 2009/2010 schoolyear	\$2,000.00
The University of Akron	The University of Akron, Department of Development	Akron	OH	44325	509 (a) (1)	To support the Center for Information Technologies and eBusiness in 2009/2010 schoolyear	\$1,500.00
The University of Akron	The University of Akron, Department of Development	Akron	OH	44325	509 (a)(1)	To support the accounting school in 2009/2010 schoolyear	\$2,000.00
The University of Akron Foundation	Department of Development	Akron	OH	44325	509(e)(1)	To support the Medina County University Center	\$100,000.00
The University of Akron Foundation	The University of Akron, Department of Development	Akron	OH	44325	509 (a)(1)	To support the advancement council in 2010/2011 schoolyear	\$2,000.00
The University of Akron Foundation	The University of Akron, Department of Development	Akron	OH	44325	509 (a) (1)	To support the Center for Information Technologies and eBusiness in 2010/2011 schoolyear	\$1,500.00
The University of Akron Foundation	The University of Akron, Department of Development	Akron	OH	44325	509 (a)(1)	To support the accounting school in 2010/2011 schoolyear	\$1,500.00
United Way of Ashland County	132 W. Main Street, Lower Level, Suite A	Ashland	OH	44806	509(e)(1)	To support community-wide needs	\$1,613.39
United Way of Central Indiana	PO Box 88409	Indianapolis	IN	46208	509(e)(1)	To support community-wide needs	\$531.62
United Way of Delaware County	40 N Sandusky St	Delaware	OH	43015	509(e)(1)	To support community-wide needs	\$216.01
United Way of Erie County	420 West 6th Street, Suite 200	Erie	PA	16507	509(a)(1)	To support community-wide needs	\$108.00
United Way of Greater Cleveland	1331 Euclid Ave	Cleveland	OH	44115	509(e)(1)	To support community-wide needs	\$842.42

WESTFIELD INSURANCE FOUNDATION
EIN 20-3816760
2010 990-PF
SCHEDULE 7

Part XVb, Approved for future payment

Donee	Purpose	Amount
Playhouse Square Foundation 1501 Euclid Avenue, Suite 200 Cleveland, OH 44115	Support the Idea Center Studio	1,500,000
University of Akron 302 Buchtel Common Akron, OH 44325	Support the University of Akron Medina County University Center	200,000
Fund for Our Economic Future 1360 East 9th Street, Suite 210 Cleveland, OH 44114	Support the Fund for Our Economic Future of Northeast Ohio	100,000

Total approved future payments	<u><u>1,800,000</u></u>
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WESTFIELD INSURANCE FOUNDATION
EIN 20-3816760
2010 990-PF
SCHEDULE 8

Part VIII, Line 1: Information About Officers, Directors, Trustees, and Foundation Managers

<u>Name and address</u>	<u>Title and average hours devoted per week</u>	<u>Compensation</u>	<u>Contributions to employee benefit plans and deferred comp</u>	<u>Expense account</u>
Robert J Joyce PO Box 5001 Westfield Center, OH 44251	Director, 50 hrs/wk	0	0	0
Robert Krisowaty PO Box 5001 Westfield Center, OH 44251	Director, 50 hrs/wk	0	0	0
Troy Gail PO Box 5001 Westfield Center, OH 44251	Director, 50 hrs/wk	0	0	0
Edward Largent PO Box 5001 Westfield Center, OH 44251	Director, 25 hrs/wk	0	0	0
James Clay PO Box 5001 Westfield Center, OH 44251	Director, 25 hrs/wk	0	0	0
Jani Davis PO Box 5001 Westfield Center, OH 44251	Director, 20 hrs/wk	0	0	0
Frank Carrino PO Box 5001 Westfield Center, OH 44251	Director, 50 hrs/wk	0	0	0
Patricia Schiesswohl PO Box 5001 Westfield Center, OH 44251	Director, 25 hrs/wk	0	0	0

Volunteer Grant Program

"We are proud of our employees' accomplishments in and out of the office. Support of our employees and our communities is an investment in Westfield's future." -Bob Joyce



Connecting to communities through employee volunteer action

Guidelines

Through the Volunteer Grant Program, Westfield supports the nonprofits most important to our employees by recognizing our colleagues who devote 50 hours or more annually to a nonprofit organization.

Employees may apply annually for one \$500 cash grant per year – those who have not previously received a grant will be given priority.

Eligibility

An employee must be classified as full- or part-time employee (as defined in the Employee Handbook) and meet volunteer requirements and have at least one year of continuous company service. Employees who have received a volunteer grant in the past are not eligible to apply for the same organization in 2010.

Volunteer requirements

The employee must have engaged in a minimum of 50 hours of active, non-compensated service to the organization in the 12 months immediately preceding the request. Service must be performed during personal time (time excused from work may not be included as part of the 50-hour requirement).

(continued on reverse)

Organization and activity eligibility

Eligible nonprofit organizations or institutions must be located within a Westfield Group operating territory and recognized by the Internal Revenue Service as tax exempt under section 501(c)(3) and as a public charity under section 509(a)(1) or 509(a)(2) of the IRS Code.

Organizations must have a valid employer identification number (EIN).

Ineligible nonprofit organizations and programs

Fraternal, labor, athletic, social, professional or veterans groups; political, legislative or lobbying groups; discriminatory groups; private foundations; religious groups (except for services available to the public, i.e. food pantries, soup kitchens, shelters); international organizations; nonacademic programs at public and private schools; organizations that directly benefit an individual or family member; or an organization that represents a conflict of interest for the employees or the company.

Grants cannot be used to fulfill personal pledge obligations or for fund-raisers

Application

Complete the employee section of the application and forward to the organization to have a representative complete its portion. Complete applications should be sent to "Volunteer Grant Program" at the Home Office between August 1 and September 30.

Grant selection

A grant review committee, comprised of a diverse group of employees, will review all submissions and make recommendations to the Westfield Insurance Foundation Board of Directors for final determination.

The grant review committee will consider the length of volunteer service, number of volunteer hours within the previous 12 months and the volunteer's impact

An organization with more than one employee volunteer is eligible to receive more than one \$500 grant annually but not more than \$1,000 annually (such a donation may be made in the name of qualifying employee volunteers).

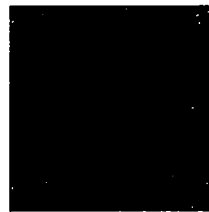
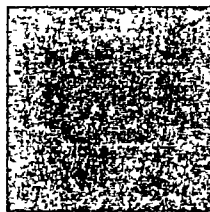
Grants will be announced in November; employees will receive checks, along with a press kit to use in promotion of the donation to the nonprofit.

Questions?

Contact Gretchen Long
Community Investment

330.887.0484

gretchenlong@westfieldgrp.com



The Volunteer Grant Program may be suspended, modified or terminated at any time by Westfield Insurance Foundation. The Westfield Insurance Foundation Board of Directors will make final determination and interpretation of all aspects of the Volunteer Grant Program. The Board will also review the Volunteer Grant Program annually and determine whether or not to continue the program.

Volunteer Grant Program Application

Employee

Name _____
Employee ID # _____ Hire Date _____
Department and Work Location _____ Manager/Supervisor _____
Work Phone _____ Name of Nonprofit _____

Approx. # of hours volunteered in the 12 months preceding the undersigned date of this application

(50-hour min.) _____ # of years involved _____

Describe volunteer activities _____

I certify that I am a non-compensated volunteer of the nonprofit organization, the information contained in this document is true and accurate to the best of my knowledge, and that my request complies fully with the provisions of the Volunteer Grant Program

Employee Signature _____

Date _____

Nonprofit

Contact Name _____
Work Phone _____
Nonprofit Name _____ EIN (Federal Tax ID #) _____
Street Address _____
City, State, Zip _____
E-mail Address _____

Is this organization a 501(c)(3), recognized under section 509(a)(1) or 509(a)(2) under the IRS code?

☐ Yes ☐ No

501(c)(3) IRS Letter of Determination enclosed? ☐ Yes ☐ No

Organizational category:

☐ Safety ☐ Education ☐ Arts/Culture ☐ Health/Human Services ☐ Civic/Community ☐ Other

Nonprofit mission _____

Describe the applicant's volunteer involvement and his/her impact on the organization.

Attach additional sheet if necessary; limit response to 250 words.

I certify that this organization is a 501(c)(3) nonprofit organization, is eligible to receive tax-deductible contributions, as defined under the Internal Revenue Code, section 509(a)(1) or 509(a)(2). I further certify that the above mentioned Westfield Group employee is a current, active volunteer for this organization and that the information contained in this application is true and accurate to the best of my knowledge

Authorized Signature _____

Date _____

Return application and documentation between August 1 and September 30, 2010.
Volunteer Grant Program, One Park Circle, Westfield Center, OH 44251-5001
gretchenlong@westfieldgrp.com