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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

**2011**

For calendar year 2011 or tax year beginning

, 2011, and ending

, 20

Name of foundation <b>The Westfield Insurance Foundation</b>		A Employer identification number <b>20-3816760</b>
Number and street (or P O box number if mail is not delivered to street address) <b>PO Box 5001</b>	Room/suite	B Telephone number (see instructions)
City or town, state, and ZIP code <b>Westfield Center, OH 44251-5001</b>		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) <b>\$ 12,665,972</b>	J Accounting method: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> 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 instructions) )		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
<b>Revenue</b>	1 Contributions, gifts, grants, etc., received (attach schedule)				
	2 Check <input checked="" 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	348,398	348,398		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	(191,026)			
	b Gross sales price for all assets on line 6a <b>8,473,245</b>				
	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 <b>Total. Add lines 1 through 11</b>	<b>157,372</b>	<b>348,398</b>			
<b>Operating and Administrative Expenses</b>	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. 1	40,251			
	17 Interest				
	18 Taxes (attach schedule) (see instructions)				
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule) Sch. 2	38			
	24 <b>Total operating and administrative expenses. Add lines 13 through 23</b>	<b>40,289</b>			
	25 Contributions, gifts, grants paid	435,307			658,000
26 <b>Total expenses and disbursements. Add lines 24 and 25</b>	<b>475,596</b>			<b>658,000</b>	
27 Subtract line 26 from line 12:					
a <b>Excess of revenue over expenses and disbursements</b>	<b>(318,224)</b>				
b <b>Net investment income</b> (if negative, enter -0-)		<b>348,398</b>			
c <b>Adjusted net income</b> (if negative, enter -0-)					

For Paperwork Reduction Act Notice, see instructions.

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Form **990-PF** (2011)MAY 30 2012  
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<b>Part II Balance Sheets</b>		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
<b>Assets</b>	<b>1</b> Cash—non-interest-bearing . . . . .		<b>44,882</b>	<b>48,593</b>	<b>48,593</b>	
	<b>2</b> Savings and temporary cash investments . . . . . Sch. 3		<b>36,156</b>	<b>162,613</b>	<b>162,613</b>	
	<b>3</b> Accounts receivable ▶					
	Less: allowance for doubtful accounts ▶					
	<b>4</b> Pledges receivable ▶					
	Less: allowance for doubtful accounts ▶					
	<b>5</b> Grants receivable . . . . .					
	<b>6</b> Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) . . . . .					
	<b>7</b> Other notes and loans receivable (attach schedule) ▶					
	Less: allowance for doubtful accounts ▶					
	<b>8</b> Inventories for sale or use . . . . .					
	<b>9</b> Prepaid expenses and deferred charges . . . . .					
	<b>10a</b> Investments—U.S. and state government obligations (attach schedule) Sch. 3		<b>3,321,347</b>	<b>2,815,830</b>	<b>2,815,830</b>	
	<b>b</b> Investments—corporate stock (attach schedule) . . . . . Sch. 3		<b>10,006,894</b>	<b>9,633,166</b>	<b>9,633,166</b>	
	<b>c</b> Investments—corporate bonds (attach schedule) . . . . .					
	<b>11</b> Investments—land, buildings, and equipment: basis ▶					
Less: accumulated depreciation (attach schedule) ▶						
<b>12</b> Investments—mortgage loans . . . . .						
<b>13</b> Investments—other (attach schedule) . . . . .						
<b>14</b> Land, buildings, and equipment: basis ▶						
Less: accumulated depreciation (attach schedule) ▶						
<b>15</b> Other assets (describe ▶ <b>Accrued Investment Income</b> )		<b>18,751</b>	<b>5,770</b>	<b>5,770</b>		
<b>16</b> <b>Total assets</b> (to be completed by all filers—see the instructions. Also, see page 1, item I) . . . . .		<b>13,428,030</b>	<b>12,665,972</b>	<b>12,665,972</b>		
<b>Liabilities</b>	<b>17</b> Accounts payable and accrued expenses . . . . .					
	<b>18</b> Grants payable . . . . .		<b>1,351,014</b>	<b>1,128,321</b>		
	<b>19</b> Deferred revenue . . . . .					
	<b>20</b> Loans from officers, directors, trustees, and other disqualified persons . . . . .					
	<b>21</b> Mortgages and other notes payable (attach schedule) . . . . .					
	<b>22</b> Other liabilities (describe ▶ )					
	<b>23</b> <b>Total liabilities</b> (add lines 17 through 22) . . . . .		<b>1,351,014</b>	<b>1,128,321</b>		
<b>Net Assets or Fund Balances</b>	<b>Foundations that follow SFAS 117, check here ▶ <input checked="" type="checkbox"/></b> <b>and complete lines 24 through 26 and lines 30 and 31.</b>					
	<b>24</b> Unrestricted . . . . .		<b>12,077,016</b>	<b>11,537,651</b>		
	<b>25</b> Temporarily restricted . . . . .					
	<b>26</b> Permanently restricted . . . . .					
	<b>Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/></b> <b>and complete lines 27 through 31.</b>					
	<b>27</b> Capital stock, trust principal, or current funds . . . . .					
	<b>28</b> Paid-in or capital surplus, or land, bldg., and equipment fund . . . . .					
	<b>29</b> Retained earnings, accumulated income, endowment, or other funds . . . . .					
	<b>30</b> <b>Total net assets or fund balances</b> (see instructions) . . . . .		<b>12,077,016</b>	<b>11,537,651</b>		
	<b>31</b> <b>Total liabilities and net assets/fund balances</b> (see instructions) . . . . .		<b>13,428,030</b>	<b>12,665,972</b>		

**Part III Analysis of Changes in Net Assets or Fund Balances**

<b>1</b> 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) . . . . .	<b>1</b>	<b>12,077,016</b>
<b>2</b> Enter amount from Part I, line 27a . . . . .	<b>2</b>	<b>(318,224)</b>
<b>3</b> Other increases not included in line 2 (itemize) ▶	<b>3</b>	
<b>4</b> Add lines 1, 2, and 3 . . . . .	<b>4</b>	<b>11,758,792</b>
<b>5</b> Decreases not included in line 2 (itemize) ▶ <b>Unrealized Investment Loss</b>	<b>5</b>	<b>221,141</b>
<b>6</b> Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 . . . . .	<b>6</b>	<b>11,537,651</b>

**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.)
<b>1a</b>				
<b>b</b>				
<b>c</b>				
<b>d</b>				
<b>e</b>				

(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)
<b>a</b>			
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b>			

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

(i) FMV 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))
<b>a</b>			
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b>			

<b>2</b> 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 }	<b>2</b>	Sch. 4 <b>(191,026)</b>
<b>3</b> 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 instructions). If (loss), enter -0- in Part I, line 8 . . . . . }	<b>3</b>	

**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))
2010	606,695	12,176,649	.04982
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

<b>2</b> Total of line 1, column (d) . . . . .	<b>2</b>	<b>.28294</b>
<b>3</b> 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 . . . . .	<b>3</b>	<b>.05659</b>
<b>4</b> Enter the net value of noncharitable-use assets for 2011 from Part X, line 5 . . . . .	<b>4</b>	<b>12,223,674</b>
<b>5</b> Multiply line 4 by line 3 . . . . .	<b>5</b>	<b>691,738</b>
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b) . . . . .	<b>6</b>	<b>3,484</b>
<b>7</b> Add lines 5 and 6 . . . . .	<b>7</b>	<b>695,222</b>
<b>8</b> 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.	<b>8</b>	<b>658,000</b>

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

<b>1a</b> 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>b</b> Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b	<b>1</b>		6,968	
<b>c</b> All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).				
<b>2</b> Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	<b>2</b>			
<b>3</b> Add lines 1 and 2	<b>3</b>		6,968	
<b>4</b> Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	<b>4</b>			
<b>5</b> Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	<b>5</b>		6,968	
<b>6</b> Credits/Payments:				
<b>a</b> 2011 estimated tax payments and 2010 overpayment credited to 2011	<b>6a</b>		3,200	
<b>b</b> Exempt foreign organizations—tax withheld at source	<b>6b</b>			
<b>c</b> Tax paid with application for extension of time to file (Form 8868)	<b>6c</b>			
<b>d</b> Backup withholding erroneously withheld	<b>6d</b>			
<b>7</b> Total credits and payments. Add lines 6a through 6d	<b>7</b>		3,200	
<b>8</b> Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached	<b>8</b>			
<b>9</b> Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	<b>9</b>		3,768	
<b>10</b> Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	<b>10</b>			
<b>11</b> Enter the amount of line 10 to be. Credited to 2012 estimated tax		Refunded	<b>11</b>	

**Part VII-A Statements Regarding Activities**

	Yes	No
<b>1a</b> 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>b</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>		✓
<b>c</b> Did the foundation file <b>Form 1120-POL</b> for this year?		✓
<b>d</b> Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ► \$ (2) On foundation managers. ► \$		
<b>e</b> Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ► \$		
<b>2</b> 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>		✓
<b>3</b> 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>		✓
<b>4a</b> Did the foundation have unrelated business gross income of \$1,000 or more during the year?		✓
<b>b</b> If "Yes," has it filed a tax return on <b>Form 990-T</b> for this year?		
<b>5</b> Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>		✓
<b>6</b> 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?	✓	
<b>7</b> 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>	✓	
<b>8a</b> Enter the states to which the foundation reports or with which it is registered (see instructions) ► Ohio		
<b>b</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>	✓	
<b>9</b> 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 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i>		✓
<b>10</b> 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)**

<b>11</b>	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 instructions)	<b>11</b>		✓
<b>12</b>	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	<b>12</b>		✓
<b>13</b>	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>www.guidestar.org</u>	<b>13</b>	✓	
<b>14</b>	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>			
<b>15</b>	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of <b>Form 1041</b> —Check here. . . . . and enter the amount of tax-exempt interest received or accrued during the year . . . . . ► <b>15</b>			
<b>16</b>	At any time during calendar year 2011, 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? . . . . . See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ►	<b>16</b>	Yes	No ✓

**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
<b>1a</b> 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? ( <b>Exception.</b> 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>b</b> If any answer is "Yes" to 1a(1)–(6), did <b>any</b> 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 instructions)? . . . . .	<b>1b</b>	
Organizations relying on a current notice regarding disaster assistance check here . . . . . ► <input type="checkbox"/>		
<b>c</b> 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 2011? . . . . .	<b>1c</b>	✓
<b>2</b> 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)).		
<b>a</b> At the end of tax year 2011, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2011? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ► 20____, 20____, 20____, 20____		
<b>b</b> Are there any years listed in 2a for which the foundation is <b>not</b> 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 instructions) . . . . .	<b>2b</b>	✓
<b>c</b> If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here. ► 20____, 20____, 20____, 20____		
<b>3a</b> 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>b</b> If "Yes," did it have excess business holdings in 2011 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? ( <i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2011.</i> ) . . . . .	<b>3b</b>	
<b>4a</b> Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	<b>4a</b>	✓
<b>b</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 2011?	<b>4b</b>	✓

**Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required** (continued)

<b>5a</b> 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))?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
(2)	Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
(3)	Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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 instructions)	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
<b>b</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 instructions)?	<b>5b</b>		
	Organizations relying on a current notice regarding disaster assistance check here	<input type="checkbox"/>		
<b>c</b>	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?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
	If "Yes," attach the statement required by Regulations section 53.4945–5(d).			
<b>6a</b>	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
<b>b</b>	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	<b>6b</b>		
	If "Yes" to 6b, file Form 8870.			
<b>7a</b>	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
<b>b</b>	If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?	<b>7b</b>		

**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 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 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 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
<b>1</b> None	
<b>2</b>	
<b>3</b>	
<b>4</b>	

**Part IX-B** Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
<b>1</b> None	
<b>2</b>	
All other program-related investments. See instructions.	
<b>3</b>	
<b>Total.</b> Add lines 1 through 3	

**Part X Minimum Investment Return** (All domestic foundations must complete this part. Foreign foundations, see instructions.)

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
<b>a</b>	Average monthly fair market value of securities . . . . .	Sch. 5	<b>1a</b> 12,363,084
<b>b</b>	Average of monthly cash balances . . . . .	Sch. 5	<b>1b</b> 46,737
<b>c</b>	Fair market value of all other assets (see instructions) . . . . .		<b>1c</b>
<b>d</b>	<b>Total</b> (add lines 1a, b, and c) . . . . .		<b>1d</b> 12,409,821
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) . . . . .	<b>1e</b>	
<b>2</b>	Acquisition indebtedness applicable to line 1 assets . . . . .		<b>2</b>
<b>3</b>	Subtract line 2 from line 1d . . . . .		<b>3</b> 12,409,821
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see instructions) . . . . .		<b>4</b> 186,147
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4 . . . . .		<b>5</b> 12,223,674
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5 . . . . .		<b>6</b> 611,184

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

<b>1</b>	Minimum investment return from Part X, line 6 . . . . .		<b>1</b> 611,184
<b>2a</b>	Tax on investment income for 2011 from Part VI, line 5 . . . . .	<b>2a</b> 6,968	
<b>b</b>	Income tax for 2011. (This does not include the tax from Part VI.) . . . . .	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b . . . . .		<b>2c</b> 6,968
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1 . . . . .		<b>3</b> 604,216
<b>4</b>	Recoveries of amounts treated as qualifying distributions . . . . .		<b>4</b>
<b>5</b>	Add lines 3 and 4 . . . . .		<b>5</b> 604,216
<b>6</b>	Deduction from distributable amount (see instructions) . . . . .		<b>6</b>
<b>7</b>	<b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 . . . . .		<b>7</b> 604,216

**Part XII Qualifying Distributions** (see instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
<b>a</b>	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26 . . . . .		<b>1a</b> 658,000
<b>b</b>	Program-related investments—total from Part IX-B . . . . .		<b>1b</b>
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes . . . . .		<b>2</b>
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the:		
<b>a</b>	Suitability test (prior IRS approval required) . . . . .		<b>3a</b>
<b>b</b>	Cash distribution test (attach the required schedule) . . . . .		<b>3b</b>
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4 . . . . .		<b>4</b> 658,000
<b>5</b>	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 instructions) . . . . .		<b>5</b>
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4 . . . . .		<b>6</b> 658,000

**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 instructions)

	(a) Corpus	(b) Years prior to 2010	(c) 2010	(d) 2011
<b>1</b> Distributable amount for 2011 from Part XI, line 7 . . . . .				<b>604,216</b>
<b>2</b> Undistributed income, if any, as of the end of 2011				
<b>a</b> Enter amount for 2010 only . . . . .			<b>0</b>	
<b>b</b> Total for prior years: 20____, 20____, 20____		<b>0</b>		
<b>3</b> Excess distributions carryover, if any, to 2011:				
<b>a</b> From 2006 . . . . . <b>22,116</b>				
<b>b</b> From 2007 . . . . . <b>1,136</b>				
<b>c</b> From 2008 . . . . . <b>341,457</b>				
<b>d</b> From 2009 . . . . . <b>0</b>				
<b>e</b> From 2010 . . . . . <b>4,473</b>				
<b>f</b> <b>Total</b> of lines 3a through e . . . . .	<b>369,182</b>			
<b>4</b> Qualifying distributions for 2011 from Part XII, line 4: ► \$ <b>658,000</b>				
<b>a</b> Applied to 2010, but not more than line 2a . . . . .			<b>0</b>	
<b>b</b> Applied to undistributed income of prior years (Election required—see instructions) . . . . .		<b>0</b>		
<b>c</b> Treated as distributions out of corpus (Election required—see instructions) . . . . .				
<b>d</b> Applied to 2011 distributable amount . . . . .				<b>604,216</b>
<b>e</b> Remaining amount distributed out of corpus . . . . .	<b>53,784</b>			
<b>5</b> Excess distributions carryover applied to 2011 (If an amount appears in column (d), the same amount must be shown in column (a).)	<b>0</b>			
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus. Add lines 3f, 4c, and 4e. Subtract line 5 . . . . .	<b>422,966</b>			
<b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b . . . . .		<b>0</b>		
<b>c</b> 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 . . . . .		<b>0</b>		
<b>d</b> Subtract line 6c from line 6b. Taxable amount—see instructions . . . . .		<b>0</b>		
<b>e</b> Undistributed income for 2010. Subtract line 4a from line 2a. Taxable amount—see instructions . . . . .			<b>0</b>	
<b>f</b> Undistributed income for 2011. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2012 . . . . .				<b>0</b>
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions) . . . . .	<b>0</b>			
<b>8</b> Excess distributions carryover from 2006 not applied on line 5 or line 7 (see instructions) . . . . .	<b>22,116</b>			
<b>9</b> <b>Excess distributions carryover to 2012.</b> Subtract lines 7 and 8 from line 6a . . . . .	<b>400,850</b>			
<b>10</b> Analysis of line 9:				
<b>a</b> Excess from 2007 . . . . . <b>1,136</b>				
<b>b</b> Excess from 2008 . . . . . <b>341,457</b>				
<b>c</b> Excess from 2009 . . . . . <b>0</b>				
<b>d</b> Excess from 2010 . . . . . <b>4,473</b>				
<b>e</b> Excess from 2011 . . . . . <b>53,784</b>				

**Part XIV Private Operating Foundations** (see 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 2011, 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)

**2a** Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

Tax year	Prior 3 years			(e) Total
(a) 2011	(b) 2010	(c) 2009	(d) 2008	
<b>b</b> 85% of line 2a				
<b>c</b> Qualifying distributions from Part XII, line 4 for each year listed				
<b>d</b> Amounts included in line 2c not used directly for active conduct of exempt activities				
<b>e</b> Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c				
<b>3</b> Complete 3a, b, or c for the alternative test relied upon:				
<b>a</b> "Assets" alternative test—enter:				
<b>(1)</b> Value of all assets				
<b>(2)</b> Value of assets qualifying under section 4942(j)(3)(B)(i)				
<b>b</b> "Endowment" alternative test—enter $\frac{2}{3}$ of minimum investment return shown in Part X, line 6 for each year listed				
<b>c</b> "Support" alternative test—enter:				
<b>(1)</b> Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)				
<b>(2)</b> Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)				
<b>(3)</b> Largest amount of support from an exempt organization				
<b>(4)</b> 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 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. &amp; 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 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
<b>a</b> <i>Paid during the year</i> See Schedule #6				658,000
<b>Total</b>			▶ <b>3a</b>	658,000
<b>b</b> <i>Approved for future payment</i> See Schedule #7				1,367,000
<b>Total</b>			▶ <b>3b</b>	1,367,000

**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 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	348,398	
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	(191,026)	
9	Net income or (loss) from special events . . . . .					
10	Gross profit or (loss) from sales of inventory . . . . .					
11	Other revenue: a					
b						
c						
d						
e						
12	Subtotal. Add columns (b), (d), and (e) . . . . .				157,372	
13	Total. Add line 12, columns (b), (d), and (e) . . . . .				13	157,372

(See worksheet in line 13 instructions 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 or support 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?		<b>Yes</b>	<b>No</b>
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.			

(a) Line no	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements

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**  
  
 Signature of officer or trustee

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) is based on all information of which preparer has any knowledge

Date 5/14/12 Title Director

May the IRS discuss this return with the preparer shown below (see instructions)? ☐ Yes ☒ No

Print/Type preparer's name	Preparer's signature	Date	Check <input type="checkbox"/> if self-employed	PTIN
Firm's name ▶	Firm's EIN ▶		Phone no	
Firm's address ▶				

WESTFIELD INSURANCE FOUNDATION  
EIN 20-3816760  
2011 990-PF  
SCHEDULE 1

**Part I, Line 16c: Other professional fees**

Consulting - General	\$ 36,646
Regulatory Fees - Other	<u>\$ 3,605</u>
Total Other Professional Fees	<u><u>\$ 40,251</u></u>

WESTFIELD INSURANCE FOUNDATION  
EIN 20-3816760  
2011 990-PF  
SCHEDULE 2

**Part I, Line 23: Other expenses**

Bank Fees	\$	38
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Total Other Expenses	\$	38
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WESTFIELD INSURANCE FOUNDATION  
EIN 20-3816760  
2011 990-PF  
SCHEDULE 3

Beginning of Year	End of Year	
Book Value (End of Year Market Value) 12/31/2010 (column a)	Book Value (End of Year Market Value) 12/31/2011 (column b)	Fair Market Value 12/31/2011 (column c)

**Part II, Line 2: Savings & Temporary Cash Investments:**

JP Morgan US Govt Institutional	36,156	162,613	162,613
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**Part II, Line 10a: Investments - US and State Government Obligations:**

Ishares - (Lehman)Barclays TIPS Bd Fd	688,128	355,905	355,905
Ishares - GS\$ Investop Corp Bd	1,333,812	1,410,624	1,410,624
Ishares - (Lehman) Barclays 7-10 Yr Treasury Bd Fd	1,299,407	453,951	453,951
Ishares - AGG Bd Fd	-	595,350	595,350
	<u>3,321,347</u>	<u>2,815,830</u>	<u>2,815,830</u>

**Part II, Line 10b: Investments - Corporate Stock:**

Ishares - MSCI EAFE Index Fund	2,546,252	1,601,553	1,601,553
Ishares - Russell Midcap Value Idx Fd	-	1,347,570	1,347,570
Ishares - Russell Midcap Growth Idx Fd	-	814,740	814,740
Ishares - Russell 1000 Value - Large Cap	1,994,753	1,101,378	1,101,378
Ishares - Russell 1000 Growth - Large Cap	1,465,856	852,403	852,403
Ishares - Russell 2000 Growth - Small Cap	528,891		
SPDR TR - Unit Ser 1 Standard & Poors	1,737,865		
SPDR SER TR - DJ Wilshire Small Cap Val	1,072,950		
Ishares - DJ US Real Estate	660,328	664,677	664,677
Ishares - S&P Smallcap 600 Val	-	1,587,040	1,587,040
Ishares - S&P Smallcap 600 Gro	-	811,723	811,723
Vanguard - Emerging Market ETF	-	852,083	852,083
	<u>10,006,895</u>	<u>9,633,166</u>	<u>9,633,166</u>

WESTFIELD INSURANCE FOUNDATION  
 EIN 20-3816760  
 2011 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)
200	Ishares Barclays TIPS Bd Fd	Purchase	1/10/2006	6/29/2011	22,144 85	20,531 00	1,613 85
1,700	Ishares Barclays TIPS Bd Fd	Purchase	4/16/2007	6/29/2011	188,231 29	170,517 48	17,713 81
100	Ishares Barclays TIPS Bd Fd	Purchase	4/7/2010	6/29/2011	11,072 43	10,396 50	675 93
600	Ishares Barclays TIPS Bd Fd	Purchase	12/28/2010	6/29/2011	66,434 56	63,990 00	2,444 56
200	Ishares Barclays TIPS Bd Fd	Purchase	12/21/2006	8/3/2011	22,770 76	19,963 72	2,807 04
100	Ishares Barclays TIPS Bd Fd	Purchase	4/16/2007	8/3/2011	11,385 38	10,030 44	1,354 94
100	Ishares Barclays TIPS Bd Fd	Purchase	12/21/2006	8/5/2011	11,478 63	9,981 86	1,496 77
350	Ishares Barclays TIPS Bd Fd	Purchase	12/21/2006	9/22/2011	40,585 21	34,936 51	5,648 70
400	Ishares Barclays AGG Bd Fd	Purchase	6/29/2011	8/3/2011	43,447 16	42,740 32	706 84
100	Ishares Barclays AGG Bd Fd	Purchase	6/29/2011	8/5/2011	10,897 08	10,685 08	212 00
600	Ishares Barclays AGG Bd Fd	Purchase	6/29/2011	9/22/2011	66,449 92	64,110 48	2,339 44
1,000	Ishares GS\$ Investop Corp Bd	Purchase	6/29/2011	8/3/2011	113,217 82	109,992 70	3,225 12
300	Ishares GS\$ Investop Corp Bd	Purchase	6/29/2011	8/5/2011	34,035 54	32,997 81	1,037 73
1,400	Ishares GS\$ Investop Corp Bd	Purchase	6/29/2011	9/22/2011	159,087 34	153,989 79	5,097 55
3,000	Ishares Barclays 7-10 Yr Treas Bd Fd	Purchase	12/21/2006	6/29/2011	288,605 25	250,666 50	37,938 75
1,350	Ishares Barclays 7-10 Yr Treas Bd Fd	Purchase	4/16/2007	6/29/2011	129,872 36	111,415 50	18,456 86
1,350	Ishares Barclays 7-10 Yr Treas Bd Fd	Purchase	9/9/2009	6/29/2011	129,872 36	122,945 85	6,926 51
1,000	Ishares Barclays 7-10 Yr Treas Bd Fd	Purchase	4/7/2010	6/29/2011	96,201 75	89,185 00	7,016 75
1,500	Ishares Barclays 7-10 Yr Treas Bd Fd	Purchase	12/28/2010	6/29/2011	144,302 63	139,650 00	4,652 63
300	Ishares Barclays 7-10 Yr Treas Bd Fd	Purchase	4/16/2007	8/3/2011	29,915 42	24,759 00	5,156 42
150	Ishares Barclays 7-10 Yr Treas Bd Fd	Purchase	4/16/2007	8/5/2011	15,102 11	12,379 50	2,722 61
900	Ishares Barclays 7-10 Yr Treas Bd Fd	Purchase	4/16/2007	9/22/2011	95,725 76	74,277 00	21,448 76
9,065	Ishares MSCI EAFE Index Fund	Purchase	12/21/2006	6/29/2011	536,193 50	658,197 87	(122,004 37)
4,235	Ishares MSCI EAFE Index Fund	Purchase	4/16/2007	6/29/2011	250,499 67	337,000 12	(86,500 45)
1,100	Ishares MSCI EAFE Index Fund	Purchase	12/21/2006	10/26/2011	57,128 94	79,869 57	(22,740 63)
600	Ishares Russell Midcap Value Idx Fd	Purchase	6/29/2011	10/26/2011	25,425 53	28,453 50	(3,027 97)
1,000	Ishares Russell Midcap Value Idx Fd	Purchase	6/29/2011	11/28/2011	41,335 20	47,422 50	(6,087 30)
200	Ishares Russell Midcap Growth Idx Fd	Purchase	6/29/2011	10/26/2011	10,966 78	12,247 04	(1,280 26)
500	Ishares Russell Midcap Growth Idx Fd	Purchase	6/29/2011	11/28/2011	26,854 98	30,617 60	(3,762 62)
400	Ishares Russell 1000 Value-Large Cap	Purchase	6/26/2007	1/20/2011	26,352 93	34,830 20	(8,477 27)
6,750	Ishares Russell 1000 Value-Large Cap	Purchase	12/21/2006	6/29/2011	455,076 25	556,195 28	(101,119 03)
4,100	Ishares Russell 1000 Value-Large Cap	Purchase	4/16/2007	6/29/2011	276,416 69	351,308 50	(74,891 81)
2,050	Ishares Russell 1000 Value-Large Cap	Purchase	6/26/2007	6/29/2011	138,208 34	178,504 77	(40,296 43)
300	Ishares Russell 1000 Value-Large Cap	Purchase	12/21/2006	10/26/2011	18,535 14	24,719 79	(6,184 65)
400	Ishares Russell 1000 Value-Large Cap	Purchase	12/21/2006	11/28/2011	23,949 53	32,959 72	(9,010 19)
6,100	Ishares Russell 1000 Growth-Large Cap	Purchase	12/21/2006	6/29/2011	367,273 94	336,628 50	30,645 44
4,500	Ishares Russell 1000 Growth-Large Cap	Purchase	4/16/2007	6/29/2011	270,939 79	259,312 50	11,627 29
250	Ishares Russell 1000 Growth-Large Cap	Purchase	12/21/2006	10/26/2011	14,248 47	13,796 25	452 22
2,800	Ishares Russell 1000 Growth-Small Cap	Purchase	1/10/2006	6/29/2011	263,159 38	206,617 04	56,542 34
2,500	Ishares Russell 1000 Growth-Small Cap	Purchase	12/21/2006	6/29/2011	234,963 73	195,786 50	39,177 23
750	Ishares Russell 1000 Growth-Small Cap	Purchase	4/16/2007	6/29/2011	70,489 13	63,033 75	7,455 38
450	Ishares DJ US Real Estate	Purchase	12/21/2006	1/20/2011	25,250 63	37,257 75	(12,007 12)
200	Ishares DJ US Real Estate	Purchase	12/21/2006	10/26/2011	11,004 78	16,559 00	(5,554 22)
900	Ishares S&P Smallcap 600 Val	Purchase	6/30/2011	10/26/2011	59,331 35	66,802 05	(7,470 70)
900	Ishares S&P Smallcap 600 Val	Purchase	6/30/2011	11/28/2011	58,179 38	66,802 05	(8,622 67)
200	Ishares S&P Smallcap 600 Gro	Purchase	6/30/2011	10/26/2011	14,272 72	16,060 86	(1,788 14)
5,050	SPDR TR - Unit Ser 1 S&P	Purchase	1/10/2006	6/29/2011	660,176 84	649,354 25	10,822 59
4,700	SPDR TR - Unit Ser 1 S&P	Purchase	12/21/2006	6/29/2011	614,422 02	665,261 50	(50,839 48)
2,070	SPDR TR - Unit Ser 1 S&P	Purchase	4/16/2007	6/29/2011	270,607 14	303,741 45	(33,134 31)
1,500	SPDR TR - Unit Ser 1 S&P	Purchase	6/26/2007	6/29/2011	196,092 13	225,112 50	(29,020 37)
500	SPDR TR - Unit Ser 1 S&P	Purchase	6/11/2010	6/29/2011	65,364 04	54,390 85	10,973 19
6,350	SPDR Ser Tr - DJ Wilshire Small Cap Val	Purchase	1/10/2006	6/30/2011	448,876 05	403,701 25	45,174 80
4,600	SPDR Ser Tr - DJ Wilshire Small Cap Val	Purchase	12/21/2006	6/30/2011	325,170 05	323,679 00	1,491 05
1,700	SPDR Ser Tr - DJ Wilshire Small Cap Val	Purchase	7/25/2008	6/30/2011	120,171 54	100,597 50	19,574 04
2,900	SPDR Ser Tr - DJ Wilshire Small Cap Val	Purchase	7/28/2009	6/30/2011	204,998 51	138,827 35	66,171 16
1,000	Vanguard - Emerging Market ETF	Purchase	6/30/2011	10/26/2011	40,514 22	48,520 20	(8,005 98)
2,324	JPMorgan US Govt - Institutional	Purchase	7/30/2010	2/1/2011	2,323 88	2,323 88	-
9,001	JPMorgan US Govt - Institutional	Purchase	8/31/2010	2/1/2011	9,000 72	9,000 72	-
7,759	JPMorgan US Govt - Institutional	Purchase	9/30/2010	2/1/2011	7,758 70	7,758 70	-
17,072	JPMorgan US Govt - Institutional	Purchase	10/29/2010	2/1/2011	17,072 48	17,072 48	-
70,355	JPMorgan US Govt - Institutional	Purchase	1/31/2011	2/1/2011	70,355 28	70,355 28	-
8,599	JPMorgan - US Govt Agency Shares	Purchase	2/28/2011	5/31/2011	8,598 91	8,598 91	-
76,384	JPMorgan - US Govt Agency Shares	Purchase	2/28/2011	8/31/2011	76,384 39	76,384 39	-
31,091	JPMorgan - US Govt Agency Shares	Purchase	2/28/2011	11/30/2011	31,091 28	31,091 28	-
5,797	JPMorgan - US Govt Agency Shares	Purchase	3/31/2011	11/30/2011	5,797 33	5,797 33	-
20,084	JPMorgan - US Govt Agency Shares	Purchase	4/29/2011	11/30/2011	20,084 02	20,084 02	-
24,620	JPMorgan - US Govt Agency Shares	Purchase	6/30/2011	11/30/2011	24,619 94	24,619 94	-
18,805	JPMorgan - US Govt Agency Shares	Purchase	7/29/2011	11/30/2011	18,805 43	18,805 43	-
69,105	JPMorgan - US Govt Agency Shares	Purchase	9/30/2011	11/30/2011	69,105 11	69,105 11	-
158,962	JPMorgan - US Govt Agency Shares	Purchase	10/31/2011	11/30/2011	158,962 34	158,962 34	-
617,280					8,473,244 74	8,664,270 41	(191,025 67)

WESTFIELD INSURANCE FOUNDATION  
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 SCHEDULE 5

**PART X: Minimum Investment Return**

**Line 1a: Average FMV of Securities**

**Assets Held More Than One Year**

	FMV 12/31/2010	FMV 12/31/2011	AVERAGE FMV 12/31/2011
3,050 shares Ishares - Barclays TIPS Bd Fd	569,856	355,905	462,880
9,600 shares Ishares - GS\$ Investop Corp Bd	1,111,510	1,092,096	1,101,803
4,300 shares Ishares - Barclays 7-10 Yr Treasury Bd Fd	1,064,857	453,951	759,404
11,150 shares Ishares - DJ US Real Estate	660,328	633,432	646,880
29,335 shares Ishares - MSCI EAFE Index Fund	2,196,932	1,452,963	1,824,947
16,750 shares Ishares - Russell 1000 Value - Large Cap	1,994,753	1,063,290	1,529,022
14,750 shares Ishares - Russell 1000 Growth - Large Cap	1,465,856	852,403	1,159,129
- shares Ishares - Russell 2000 Growth - Small Cap	528,891	-	264,446
- shares SPDR TR - Unit Ser 1 Standard & Poors	1,674,990	-	837,495
- shares SPDR SER TR - DJ Wilshire Small Cap Val	1,072,950	-	536,475
88,935			9,122,481

**Assets Held Less Than One Year**

	DAYS HELD	FMV 12/31/2011	AVERAGE FMV 12/31/2011
5,400 shares Ishares - Barclays AGG Bd Fd	186	595,350	303,384
2,800 shares Ishares - GS\$ Investop Corp Bd	186	318,528	162,318
600 shares Ishares - MSCI EAFE Index Fund	151	29,718	12,294
400 shares Ishares - MSCI EAFE Index Fund	149	19,812	8,088
2,000 shares Ishares - MSCI EAFE Index Fund	101	99,060	27,411
29,300 shares Ishares - Russell Midcap Value Idx Fd	186	1,271,620	648,004
1,300 shares Ishares - Russell Midcap Value Idx Fd	151	56,420	23,341
150 shares Ishares - Russell Midcap Value Idx Fd	149	6,510	2,658
300 shares Ishares - Russell Midcap Value Idx Fd	101	13,020	3,603
14,000 shares Ishares - Russel Midcap Growth Idx Fd	186	770,700	392,740
700 shares Ishares - Russel Midcap Growth Idx Fd	151	38,535	15,942
100 shares Ishares - Russel Midcap Growth Idx Fd	149	5,505	2,247
600 shares Ishares - Russell 1000 Value - Large Cap	151	38,088	15,757
150 shares Ishares - DJ US Real Estate	185	8,522	4,319
300 shares Ishares - DJ US Real Estate	151	17,043	7,051
100 shares Ishares - DJ US Real Estate	149	5,681	2,319
20,900 shares Ishares - S&P Smallcap 600 Val	185	1,457,984	738,978
500 shares Ishares - S&P Smallcap 600 Val	151	34,880	14,430
150 shares Ishares - S&P Smallcap 600 Val	149	10,464	4,272
1,200 shares Ishares - S&P Smallcap 600 Val	101	83,712	23,164
10,200 shares Ishares - S&P Smallcap 600 Gro	185	759,594	385,000
400 shares Ishares - S&P Smallcap 600 Gro	151	29,788	12,323
150 shares Ishares - S&P Smallcap 600 Gro	149	11,171	4,560
150 shares Ishares - S&P Smallcap 600 Gro	101	11,171	3,091
19,000 shares Vanguard - Emerging Market ETF	185	725,990	367,968
300 shares Vanguard - Emerging Market ETF	151	11,463	4,742
300 shares Vanguard - Emerging Market ETF	149	11,463	4,679
2,700 shares Vanguard - Emerging Market ETF	101	103,167	28,548
100,269 shares JPMorgan - US Govt Agency Shares	62	100,269	17,032
62,344 shares JPMorgan - US Govt Agency Shares	2	62,344	342
276,763			3,240,603
365,698	Total on line 1a		12,363,084

**Line 1b: Cash Balance Average**

	Balance 12/31/2010	Balance 12/31/2011	Average Balance
Total on line 1b	44,882	48,593	46,737
Total on 1d			12,409,821

WESTFIELD INSURANCE FOUNDATION  
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Organization	Address	City	ST	Zip Code	Foundation Status of Recipient	Purpose of Grant or Contribution	Amount
Fund For Our Economic Future	1360 East Ninth Street	Cleveland	OH	44114	509(a)(1)	To support economic development efforts in NE Ohio	\$33,000.00
Playhouse Square Foundation	1501 Euclid Ave Ste 200	Cleveland	OH	44115	509(a)(1)	To support building of broadcast theatre for public tv and radio	\$300,000.00
The University of Akron Foundation	Department of Development	Akron	OH	44325	509(a)(1)	To support the Medina County University Center	\$100,000.00
United Way of Medina County	2573 Medina Road	Medina	OH	44256	509(a)(1)	To support general operations	\$40,000.00
Akron-Canton Regional Foodbank	350 Opportunity Parkway	Akron	OH	44307	509(a)(1)	To support general operations	\$5,286.54
Central Pennsylvania Foodbank	3908 Correy Road	Harrisburg	PA	17108	509(a)(1)	To support general operations	\$188.40
Cleveland Foodbank	15500 South Waterloo Rd	Cleveland	OH	44110	509(a)(1)	To support general operations	\$173.00
Dixie Care Foodbank	P O Box 35459	Louisville	KY	40232	509(a)(1)	To support general operations	\$284.59
Northern Illinois Foodbank	800 Industrial Dr	St. Charles	IL	60174	509(a)(1)	To support general operations	\$14.80
Second Harvest Foodbank of Central Florida	2008 Bregle Avenue	Orlando	FL	32808	509(a)(1)	To support general operations	\$14.23
Second Harvest Foodbank of Middle Tennessee	331 Great Circle Road	Nashville	TN	37228	509(a)(1)	To support general operations	\$184.98
Second Harvest Foodbank of North Central Ohio	7445 Deer Trail Lane	Lorain	OH	44653	509(a)(1)	To support general operations	\$147.99
Second Harvest Heartland	1140 Gervais Ave	St Paul	MN	55109	509(a)(1)	To support general operations	\$99.61
American Heart Association of Akron	3505 Embassy Parkway	Akron	OH	44333	509(a)(1)	To support general operations	\$193.81
American Heart Association of Canton	4682 Douglas Circle NW	Canton	OH	44718	509(a)(1)	To support general operations	\$419.35
American Heart Association of Cincinnati	5211 Madison Road	Cincinnati	OH	45227	509(a)(1)	To support general operations	\$113.84
American Heart Association of Cleveland Metro	1889 East 115th Street	Cleveland	OH	44110	509(a)(1)	To support general operations	\$1,264.72
American Heart Association of Columbus OH	5455 N. High Street	Columbus	OH	43216	509(a)(1)	To support general operations	\$73.99
American Heart Association of Des Moines	1111 Ninth Street	Des Moines	IA	50314	509(a)(1)	To support general operations	\$37.00
American Heart Association of Lancaster	810 Community Way	Lancaster	PA	17603	509(a)(1)	To support general operations	\$160.51
American Heart Association of Marietta	1101 Northchase Parkway	Marietta	GA	30067	509(a)(1)	To support general operations	\$37.00
American Heart Association of Minneapolis	4701 W. 77th Street	Minneapolis	MN	55435	509(a)(1)	To support general operations	\$28.46
American Heart Association of Newark, DE	200 Continental Dr.	Newark	DE	19713	509(a)(1)	To support general operations	\$73.99
American Heart Association of Orlando	237 East Mills Road	Orlando	FL	32803	509(a)(1)	To support general operations	\$174.23
American Heart Association of Pittsburgh PA	777 Penn Center Blvd.	Pittsburgh	PA	15235	509(a)(1)	To support general operations	\$37.00
Butler County United Way	184 Pittsburgh Road	Butler	PA	16001	509(a)(1)	To support general operations	\$47.99
Greater Cleveland United Way	1331 Euclid Ave	Cleveland	OH	44115	509(a)(1)	To support general operations	\$701.73
United Way of Greater Cincinnati	404 S. Eighth Street	Minneapolis	MN	55404	509(a)(1)	To support general operations	\$28.46
Heart of Florida United Way	Dr. Nelson Ymca Center	Orlando	FL	32804	509(a)(1)	To support general operations	\$14.23
Heart of Western Michigan United Way	118 Commerce Ave SW	Grand Rapids	MI	49503	509(a)(1)	To support general operations	\$49.00
Metro United Way (Louisville, KY)	PO Box 4488	Louoville	KY	40204	509(a)(1)	To support general operations	\$37.00
United Way of Allen County	134 E. Berry Street	Fort Wayne	IN	46802	509(a)(1)	To support general operations	\$71.15
United Way of Ashland County	132 W. Main Street	Ashland	OH	44805	509(a)(1)	To support general operations	\$332.97
United Way of Central Indiana	PO Box 88409	Indianapolis	IN	46208	509(a)(1)	To support general operations	\$284.59
United Way of Central West Virginia	One United Way Square	Charleston	WV	25301	509(a)(1)	To support general operations	\$37.00
United Way of Dickinson County	718 E. College Street	Dickson	TN	37055	509(a)(1)	To support general operations	\$56.92
United Way of Erie County	416 Columbus Ave	Sandusky	OH	44870	509(a)(1)	To support general operations	\$44.99
United Way of Greater Cincinnati	2400 Reading Road	Cincinnati	OH	45202	509(a)(1)	To support general operations	\$174.40
United Way of Greater Knoxville	1301 Hannah Ave	Knoxville	TN	37621	509(a)(1)	To support general operations	\$179.29
United Way of Greater Stark County	4825 Hibbee Ave NW	Canton	OH	44718	509(a)(1)	To support general operations	\$1,516.86
United Way of Lancaster County	630 Janet Avenue	Lancaster	PA	17601	509(a)(1)	To support general operations	\$924.35
United Way of Lebanon County	PO Box 1164	Lebanon	PA	17042	509(a)(1)	To support general operations	\$88.79
United Way of Metropolitan Atlanta	100 Edgewood Ave NE	Atlanta	GA	30303	509(a)(1)	To support general operations	\$110.99
United Way of Portage County	PO Box 845	Ravenna	OH	44266	509(a)(1)	To support general operations	\$184.98
United Way of Richland County	35 N Park Street	Mansfield	OH	44902	509(a)(1)	To support general operations	\$37.00
United Way of Southern Kentucky	PO Box 3330	Bowling Green	KY	42102	509(a)(1)	To support general operations	\$111.84
United Way of Summit County	PO Box 1260	Akron	OH	44307	509(a)(1)	To support general operations	\$258.98
United Way of Summit County	1531 Hunt Club Boulevard	Gallatin	TN	37065	509(a)(1)	To support general operations	\$553.10
United Way of the Capital Region	2235 Millenium Way	Enola	PA	17025	509(a)(1)	To support general operations	\$897.57
United Way of Wayne and Holmes Counties	215 S. Walnut Street	Wooster	OH	44691	509(a)(1)	To support general operations	\$14.80
United Way of York County	800 E King Street	York	PA	17403	509(a)(1)	To support general operations	\$14.80
Valley of the Sun United Way	1515 E. Osborn Road	Phoenix	AZ	85014	509(a)(1)	To support general operations	\$184.98
American Cancer Society of Atlanta	250 Williams Street	Atlanta	GA	30303	509(a)(1)	To support general operations	\$37.00
American Cancer Society of Des Moines	8364 Hickman	Des Moines	IA	50325	509(a)(1)	To support general operations	\$37.00
American Cancer Society of Florida	3709 W Jettson Ave	Tampa	FL	33629	509(a)(1)	To support general operations	\$68.22
American Cancer Society of Lancaster	314 Good Dr.	Lancaster	PA	17603	509(a)(1)	To support general operations	\$261.61
American Cancer Society of Lebanon	855 Truck Street	Lebanon	PA	17042	509(a)(1)	To support general operations	\$174.00
American Cancer Society of NE Reg. Office of Ohio	10605 56th Ave	Cleveland	OH	44106	509(a)(1)	To support general operations	\$356.17
American Cancer Society of Northeast Indiana	111 East Ludwig Road	Fort Wayne	IN	46825	509(a)(1)	To support general operations	\$71.15
American Cancer Society of NE Reg. Office of Ohio	525 North Broad Street	Candfield	OH	44408	509(a)(1)	To support general operations	\$1,852.38
American Cancer Society of Northern Kentucky	297 Buttermilk Pk	Fort Mitchell	KY	41017	509(a)(1)	To support general operations	\$37.00
American Cancer Society of Ohio	5555 Frantz Rd	Dublin	OH	43017	509(a)(1)	To support general operations	\$74.00
American Cancer Society of Oklahoma City	6525 N Meridian	Oklahoma City	OK	73116	509(a)(1)	To support general operations	\$28.46
American Cancer Society of Pennsylvania	Rt 422 & Sipe Ave	Hershey	PA	17033	509(a)(1)	To support general operations	\$303.09
American Cancer Society of York	924 N Colonial Ave	York	PA	17403	509(a)(1)	To support general operations	\$28.41
Habitat for Humanity of Ohio	88 E. Broad Street	Columbus	OH	43215	509(a)(1)	To support 2011 Conference	\$1,000.00
Habitat for Humanity of Summit County	2301 Roma Road	Akron	OH	44320	509(a)(1)	To support home construction	\$5,000.00
Habitat for Humanity of Greater Columbus	3140 Westerville Rd	Columbus	OH	43224	509(a)(1)	To support home construction	\$2,500.00
Habitat for Humanity of Northern Fox Valley	20 South Grove	Carpentersville	IL	60110	509(a)(1)	To support home construction	\$2,500.00
Habitat for Humanity of Wayne County	1451 Spruce St. Ext	Wooster	OH	44691	509(a)(1)	To support home construction	\$5,000.00
Habitat for Humanity of Ohio	88 E. Broad Street	Columbus	OH	43215	509(a)(1)	To support 2011 Conference	\$2,000.00
Habitat for Humanity of Kent County	425 Pleasant Street NW	Grand Rapids	MI	49503	509(a)(1)	To support education partnership program	\$5,000.00
Habitat for Humanity of Greater Indianapolis	1011 E. 22nd St	Indianapolis	IN	46202	509(a)(1)	To support home construction	\$2,500.00
The Fair Housing Center	432 N Superior Street	Toledo	OH	43604	509(a)(1)	To support foreclosure prevention	\$3,000.00
Northwest Ohio Development Organization	432 N Superior Street	Toledo	OH	43604	509(a)(1)	To support individual Development Accounts	\$3,000.00
Neighborhood Housing Services of Cleveland	5700 Broadway Ave	Cleveland	OH	44127	509(a)(1)	To support homebuying education	\$3,000.00
Spanish American Committee	4407 Lorain Ave	Cleveland	OH	44113	509(a)(1)	To provide home buying support to low income families	\$1,000.00
Fairfax Renaissance Development Corp	2111 Quincy Ave	Cleveland	OH	44104	509(a)(1)	To support home buying for low income families	\$1,000.00
Lebanon Togoer Center Pittsburgh	631 Iron City Drive	Pittsburgh	PA	15205	509(a)(1)	To support home repairs	\$3,500.00
Lancaster Area Habitat for Humanity	443 Fairview Avenue	Lancaster	PA	17603	509(a)(1)	To support home construction	\$2,500.00
Maumee Valley Habitat for Humanity	6855 Spring Valley Drive	Holland	OH	43528	509(a)(1)	To support home construction	\$2,500.00
Fair Housing Advocates	520 S. Main Street	Akron	OH	44311	509(a)(2)	To support radio programs to educate on housing discrimination	\$3,000.00
Habitat for Humanity of Medina	342 E. Smith Road	Medina	OH	44256	509(a)(1)	To support home construction	\$5,000.00
Habitat for Humanity of Charlotte	3815 Latrobe Drive	Charlotte	NC	28211	509(a)(1)	To support home repairs	\$7,500.00
Governor's Highway Safety Association	444 North Capitol St. NW	Washington	D.C.	20001	509(a)(1)	To support driver safety training for teens	\$15,000.00
Michelle's Leading Star Foundation	4421 Lakewood Glen Dr	Medina	OH	44256	509(a)(1)	To provide safe driving education in high school health classes	\$5,000.00
Seneca Valley High School	124 Seneca School Rd	Harmony	PA	16037	509(a)(3), gov't equiv	To support safety program for teens	\$15,000.00
INVEST	127 S Peyton St	Alexandria	VA	22315	509(a)(1)	To support medical care education about insurance	\$15,000.00
Entrepreneur Achievement of North Central Ohio	200 Firststone Parkway, 2nd Fl	Akron	OH	44319	509(a)(1)	To support classes in elementary, middle and high school	\$2,500.00
Young Entrepreneurs Academy	580 White Spruce Blvd	Rochester	NY	14623	509(a)(1)	To support entrepreneurship program for teens	\$5,000.00
Surety Foundation	1101 Connecticut Ave. NW	Washington	DC	20036	509(a)(1)	To provide scholarships to higher educ. students studying surety	\$1,000.00
The Pennsylvania State University	17 Old Main	University Park	PA	16802	509(a)(3), type I	To provide rollover protective structures on tractors	\$15,000.00
The Bridge of Penn-York Valley Churches	PO Box 202	Sayre	PA	18840	509(a)(1)	To support flood relief and rebuilding efforts	\$10,000.00
LSS Foundation	1050 Pennsylvania Ave	York	PA	17404	509(a)(1)	To support flood relief and rebuilding efforts	\$10,000.00
United Way of Medina County	2573 Medina Road	Medina	OH	44256	509(a)(1)	To support community needs assessment	\$6,830.00
United Way of Medina County	2573 Medina Road	Medina	OH	44256	509(a)(1)	To support feeding Medina County initiative	\$5,000.00
Lodi Community Church	8701 Congress Road	West Salem	OH	44287	509(a)(1), group exemp	To support school supplies giveaway	\$5,000.00
Forever Home Adoption Center, Inc.	5984 Main Street	East Petersburg	PA	16520	509(a)(2)	To support general operations	\$500.00
Conner Church	2524 Medina Rd Suite 300	Medina	OH	44256	509(a)(1), group exemp	To support Connection Cupboard	\$270.00
Habitat for Humanity of Northern Fox Valley	800 N. State	Elgin	IL	60123	509(a)(1), group exemp	To support general operations	\$2,500.00
The Strand Theater Intiative	119 North Main Street	Zenonople	PA	16063	509(a)(1)	To support general operations	\$300.00
Lodi United Methodist Church	P O Box 3	Lodi	OH	44254	509(a)(1), group exemp	To support Feed My Sheep program	\$480.00
Susan G. Komen Northeast	26210 Emery Road	Cleveland	OH	44128	509(a)(2), group exemp	To support general operations	\$450.00
Medina County District Library	210 S. Broadway	Medina	OH	44256	Library, gov't equiv	To support general operations	\$350.00
Second Presbyterian Church	7700 N. Meridian	Indianapolis	IN	46260	509(a)(1), group exemp	To support Servants at Work program	\$360.00
United Way of Medina County	2573 Medina Rd	Medina	OH	44256	509(a)(1)	To support general operations	\$500.00
Feeding America West Michigan Foodbank	864 West River Center Drive	Comstock Park	MI	49321	509(a)(1)	To support general operations	\$260.00
Grace C&MA Church	7393 Pearl Rd	Middleburg Heights	OH	44130	509(a)(1), group exemp	To support Habitat for Humanity project	\$500.00
St. Baldrick's Foundation	1333 S. Mayflower Ave	Moravia	CA	92315	509(a)(1)	To support general operations	\$1,000.00
Playhouse Church	2121 Drake Road	Stronsville	OH	44149	509(a)(1)	To support Playground Equipment improvements	\$280.00
Highland Robotics & Technology Boosters	3880 Ridge Road	Medina	OH	44256	501(a)(3)	To support general operations	\$500.00
Brain Injury Assoc of Ohio	855 Grandview Avenue	Columbus	OH	43215	509(a)(1)	To support general operations	\$400.00
Cascade Locks Park Association (CLPA)	248 Ferndale Street	Akron	OH	44304	509(a)(1)	To support general operations	\$500.00
Matthew 25 Coalition	105 Evergreen	Lodi	OH	44254	509(a)(1)	To support general operations	\$500.00
Medina Creative Housing	1120 N Huntington Street	Medina	OH	44256	509(a)(1)	To support general operations	\$250.00
Lodi Community Church	9701 Congress Road	West Salem	OH	44287	Church, group exemp	To support Outreach programs	\$500.00
Greenleaf Family Center	212 East Exchange Street	Akron	OH	44304	509(a)(1)	To support general operations	\$350.00
Central Illinois Memorial Kidney Foundation	PO Box 235	Morton	IL	61550	509(a)(1)	To support general operations	\$500.00
Ashland Church of the Nazarene	1196 Twg Rd 1506	Ashland	OH	44805	509(a)(1)	To support Trunk of Treat	\$320.00
Contemporary Youth Orchestra	PO Box 181099	Cleveland Heights	OH	44116	509(a)(2)	To support general operations	\$500.00
Boy Scouts of America	1501 S Main St	Akron	OH	44309	509(a)(1)	To support Camp Scholarships for Medina County scouts	\$500.00
							\$658,000.00

WESTFIELD INSURANCE FOUNDATION  
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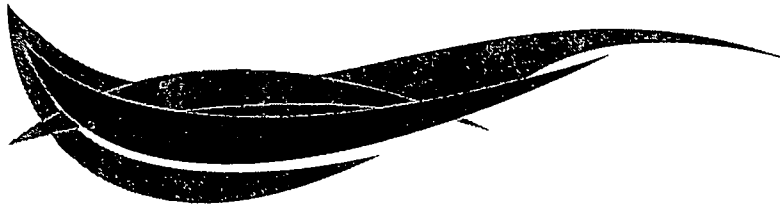
**Part XVb, Approved for future payment**

Donee	Purpose	Amount
Playhouse Square Foundation 1501 Euclid Avenue, Suite 200 Cleveland, OH 44115	Support the Idea Center Studio	1,200,000
University of Akron 302 Buchtel Common Akron, OH 44325	Support the University of Akron Medina County University Center	100,000
Fund for Our Economic Future 1360 East 9th Street, Suite 210 Cleveland, OH 44114	Support the Fund for Our Economic Future of Northeast Ohio	67,000
Total approved future payments		<u><u>1,367,000</u></u>

WESTFIELD INSURANCE FOUNDATION  
EIN 20-3816760  
2011 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
Joe Kohmann PO Box 5001 Westfield Center, OH 44251	Director, 50 hrs/wk	0	0	0
Jon Park PO Box 5001 Westfield Center, OH 44251	Director, 50 hrs/wk	0	0	0
Edward Largent PO Box 5001 Westfield Center, OH 44251	Director, 50 hrs/wk	0	0	0
James Clay PO Box 5001 Westfield Center, OH 44251	Director, 50 hrs/wk	0	0	0
Jani Groza PO Box 5001 Westfield Center, OH 44251	Director, 40 hrs/wk	0	0	0
Frank Carrino PO Box 5001 Westfield Center, OH 44251	Director, 1 hr/wk	0	0	0
Patricia Schiesswohl PO Box 5001 Westfield Center, OH 44251	Director, 50 hrs/wk	0	0	0



WESTFIELD  
INSURANCE  
FOUNDATION™

# Volunteer Grant Program

*Recognizing employees and the organizations they care about most*



Through the Volunteer Grant Program, Westfield Insurance Foundation recognizes Westfield Group colleagues who volunteer 25 hours or more annually to a qualifying nonprofit organization with a cash grant to the nonprofit. Grant amounts range between \$250 and \$500.

# Guidelines

## Employee Eligibility

An employee must be classified as a full- or part-time employee (as defined in the Employee Handbook) and have at least one year of continuous company service. Employees who have received a volunteer grant in the past are eligible to apply for the same organization annually. Employees who volunteer a minimum of 25 hours for more than one nonprofit may only apply for one volunteer grant annually.

## Volunteer requirements

The employee must have engaged in a minimum of 25 hours of active, non-compensated service to the organization in the 12 months preceding the request. Service must be performed during personal time (time excused from work may not be included as part of the 25-hour minimum requirement).

## 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). Religious organizations or groups are eligible if volunteer work provides a service, result or outcome that is not religious in nature and/or has nondiscrimination policies (i.e. food pantries, soup kitchens, shelters, home building/repair, disaster relief).

## Ineligible nonprofit organizations and programs

Fraternal, labor, athletic, social, professional or veterans groups; political, legislative or lobbying groups, discriminatory groups, private foundations, religious groups' programs limited to membership and/or religious activities/purposes, 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.

## Grant Selection

The community investment staff will review all submissions and make decisions based on:

1) completion of the application; 2) adherence to guidelines, including employee and nonprofit eligibility, and 3) available funds. If requests received exceed funds available, payment of grant will be held until January of subsequent fiscal year.

Grant amounts are based on number of hours volunteered, length of service to the nonprofit and funds available. Grants range from \$250 - \$500.

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

Employees will be notified of their application approval status within 15 days. Employees will receive the grant check and a letter to give to the nonprofit. The nonprofit will subsequently receive a press release to consider for use in recognizing the grant.

## Application

Complete the employee section of the application and forward to the organization to have a representative complete its portion. Completed applications must be submitted before **September 1**.

### Option 1: hard copy application

Available on page 3 of this document

### Option 2: online application

Employee application link (application includes link to nonprofit application, both portions must be completed)

<http://fs16.formsite.com/WFCommunityInvestment/form1/index.html>

## Questions?

Contact Gretchen Long, program and grant manager  
ext. 4300484 • [gretchenlong@westfieldgrp.com](mailto:gretchenlong@westfieldgrp.com)

*The Volunteer Grant Program may be suspended, modified or terminated at any time by Westfield Insurance Foundation*

# Volunteer Grant Program Application

## Employee section (to be completed by Westfield Employee)

Name \_\_\_\_\_ Employee ID # \_\_\_\_\_ Hire Date (month/year) \_\_\_\_/\_\_\_\_/\_\_\_\_

Work phone: \_\_\_\_\_ I work in the Home Office: ☐ Yes ☐ No

If no, I work in a Service Office/Westfield Bank location: \_\_\_\_\_ (City, State) Leader \_\_\_\_\_

Approx # of hours volunteered in the 12 months preceding the date of this application \_\_\_\_\_

Name of nonprofit: \_\_\_\_\_ # 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. I hereby grant authority to Westfield Insurance Foundation and Ohio Farmers Insurance Company to use and disclose information from my volunteer grant application regarding my volunteer activities (and their impact upon the nonprofit organization) on the Westfield Intranet, on WestfieldInsurance.com and/or on Facebook. I grant this permission without any expectation of compensation whatsoever, and I release those entities from any claims which might arise from the authorized use of the information.

Employee Signature \_\_\_\_\_

Date \_\_\_\_\_

## Nonprofit section (to be completed by nonprofit representative)

Contact Name \_\_\_\_\_

Work Phone \_\_\_\_\_

Nonprofit Name \_\_\_\_\_ EIN (Federal Tax ID #) \_\_\_\_\_

Street Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

E-mail Address \_\_\_\_\_

### Organizational category:

☐ Safety ☐ Education ☐ Arts/Culture ☐ Health ☐ Human Services  
☐ Civic/Community ☐ Environment ☐ 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 by September 1, 2011  
Volunteer Grant Program, One Park Circle, Westfield Center, OH 44251-5001  
communityinvestment@westfieldgrp.com