

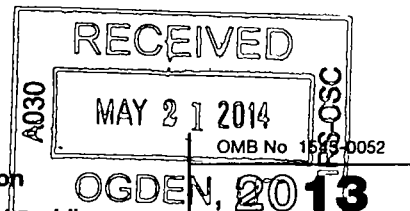


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Form **990-PF**Department of the Treasury
Internal Revenue Service**Return of Private Foundation**
or Section 4947(a)(1) Trust Treated as Private Foundation▶ Do not enter Social Security numbers on this form as it may be made public.
▶ Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf.

Open to Public Inspection



For calendar year 2013 or tax year beginning

, 2013, and ending

, 20

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 instructions)
City or town, state or province, country, and ZIP or foreign postal code Westfield Center, OH 44251-5001		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <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) ▶ \$ 21,365,717	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)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

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)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)	5,002,155			
	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	337,509	337,509		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	215,690			
	b Gross sales price for all assets on line 6a	5,997,804			
	7 Capital gain net income (from Part IV, line 2)		215,690		
	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	5,555,354	553,199			
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) Sched. 1	45,679			
	17 Interest	0			
	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) Sched. 2	1,049			
	24 Total operating and administrative expenses. Add lines 13 through 23	46,728			
	25 Contributions, gifts, grants paid	359,343			708,000
26 Total expenses and disbursements. Add lines 24 and 25	406,071			708,000	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	5,149,283				
b Net investment income (if negative, enter -0-)		553,199			
c Adjusted net income (if negative, enter -0-)			0		

For Paperwork Reduction Act Notice, see instructions.

Cat No 11289X

Form 990-PF (2013)

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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	308,842	39,909	39,909
	2 Savings and temporary cash investments Sch 3	131,709	254,329	254,329
	3 Accounts receivable ▶ 2,135			
	Less: allowance for doubtful accounts ▶	52,620	2,135	2,135
	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 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	2,920,161	4,404,922	4,404,922
	b Investments—corporate stock (attach schedule) Sch 3	10,789,738	16,654,183	16,654,183
	c Investments—corporate bonds (attach schedule)			
Liabilities	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 ▶)	6,514	10,239	10,239
	16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	14,209,584	21,365,717	21,365,717
	17 Accounts payable and accrued expenses		19,160	
	18 Grants payable	904,852	556,195	
Net Assets or Fund Balances	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)	904,852	575,355	
	Foundations that follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted	13,304,732	20,790,362	
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 27 through 31.			
Net Assets or Fund Balances	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 instructions)	13,304,732	20,790,362	
	31 Total liabilities and net assets/fund balances (see instructions)	14,209,584	21,365,717	

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	13,304,732
2 Enter amount from Part I, line 27a	2	5,149,283
3 Other increases not included in line 2 (itemize) ▶ <u>Unrealized Investment Gain</u>	3	2,336,347
4 Add lines 1, 2, and 3	4	20,790,362
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	20,790,362

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				
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	Sch.4 215,690
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 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.

1 Enter the appropriate amount in each column for each year; see the instructions before making any entries.			
(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))
2012	634,000	12,866,405	.04928
2011	658,000	12,223,674	.05383
2010	606,695	12,176,649	.04982
2009	510,274	10,625,897	.04802
2008	922,095	11,782,962	.07826
2 Total of line 1, column (d)			2 .27921
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 .05584
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5			4 15,549,991
5 Multiply line 4 by line 3			5 868,311
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 5,532
7 Add lines 5 and 6			7 873,843
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.			8 708,000

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see 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 type="checkbox"/> and enter 1% of Part I, line 27b	1	11,064	
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-)	2		
3	Add lines 1 and 2	3	11,064	
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4		
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	11,064	
6	Credits/Payments:			
a	2013 estimated tax payments and 2012 overpayment credited to 2013	6a	8,125	
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	7	8,125	
8	Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8		
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	2,939	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11	Enter the amount of line 10 to be: Credited to 2014 estimated tax Refunded	11		

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?		<input checked="" type="checkbox"/>
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for the 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>		<input checked="" type="checkbox"/>
c Did the foundation file Form 1120-POL for this year?		<input checked="" type="checkbox"/>
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>		<input checked="" type="checkbox"/>
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>		<input checked="" type="checkbox"/>
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		<input checked="" type="checkbox"/>
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>		<input checked="" type="checkbox"/>
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?	<input checked="" type="checkbox"/>	
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>	<input checked="" type="checkbox"/>	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ OHIO		
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>	<input checked="" type="checkbox"/>	
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 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i>		<input checked="" type="checkbox"/>
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i> See Schedule B	<input checked="" type="checkbox"/>	

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 instructions)	11		✓
12	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)	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 ▶ 15			
16	At any time during calendar year 2013, 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 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 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 2013?	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 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? <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 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 2013 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 2013.)	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 2013?	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 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 instructions)?Organizations relying on a current notice regarding disaster assistance check here ☐**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? ☐ Yes ☒ No
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?**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

1 NONE	
2	
3	
4	

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

1 NONE	
2	
All other program-related investments See instructions	
3	
Total. Add lines 1 through 3	

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see 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 Schedule 5	1a	15,608,076
b	Average of monthly cash balances Schedule 5	1b	178,717
c	Fair market value of all other assets (see instructions)	1c	
d	Total (add lines 1a, b, and c)	1d	15,786,793
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	
3	Subtract line 2 from line 1d	3	15,786,793
4	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see instructions)	4	236,802
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	15,549,991
6	Minimum investment return. Enter 5% of line 5	6	777,500

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.)

1	Minimum investment return from Part X, line 6	1	777,500
2a	Tax on investment income for 2013 from Part VI, line 5 2a		11,064
b	Income tax for 2013. (This does not include the tax from Part VI.) 2b		
c	Add lines 2a and 2b	2c	11,064
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	766,436
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	766,436
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	766,436

Part XII Qualifying Distributions (see 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	708,000
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	708,000
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 instructions)	5	
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	708,000

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 2012	(c) 2012	(d) 2013
1 Distributable amount for 2013 from Part XI, line 7				766,436
2 Undistributed income, if any, as of the end of 2013:				
a Enter amount for 2012 only			0	
b Total for prior years: 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2013:				
a From 2008	339,992			
b From 2009	0			
c From 2010	4,473			
d From 2011	53,784			
e From 2012	0			
f Total of lines 3a through e	398,249			
4 Qualifying distributions for 2013 from Part XII, line 4: ► \$ 708,000				
a Applied to 2012, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions)		0		
c Treated as distributions out of corpus (Election required—see instructions)	0			
d Applied to 2013 distributable amount				708,000
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a).)	58,436			58,436
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	339,813			
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 instructions		0		
e Undistributed income for 2012. Subtract line 4a from line 2a. Taxable amount—see instructions			0	
f Undistributed income for 2013. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2014				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)	0			
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions)	281,556			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	58,257			
10 Analysis of line 9:				
a Excess from 2009	0			
b Excess from 2010	4,473			
c Excess from 2011	53,784			
d Excess from 2012	0			
e Excess from 2013	0			

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 2013, 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)

	Tax year	Prior 3 years			(e) Total
	(a) 2013	(b) 2012	(c) 2011	(d) 2010	
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 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 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 Insur.Co. through 100% owned subsidiaries, Westfield Insur. Co., Westfield National Insur.Co. & Old Guard Insur. 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 or e-mail address 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	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
Name and address (home or business)				
a <i>Paid during the year</i> See schedule #6				708,000
Total			3a	708,000
b <i>Approved for future payment</i> See schedule #7				729,000
Total			3b	729,000

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	337,509	
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	215,690	
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	5,002,155	
b	_____					
c	_____					
d	_____					
e	_____					
12	Subtotal. Add columns (b), (d), and (e)				5,555,354	
13	Total. Add line 12, columns (b), (d), and (e)				13	5,555,354

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

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

[illegible]

		Yes	No
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?		
a	Transfers from the reporting foundation to a noncharitable exempt organization of:		
	(1) Cash		✓
	(2) Other assets		✓
b	Other transactions:		
	(1) Sales of assets to a noncharitable exempt organization		✓
	(2) Purchases of assets from a noncharitable exempt organization		✓
	(3) Rental of facilities, equipment, or other assets		✓
	(4) Reimbursement arrangements		✓
	(5) Loans or loan guarantees		✓
	(6) Performance of services or membership or fundraising solicitations		✓
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees		✓
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) is based on all information of which preparer has any knowledge.

Signature of officer or trustee

5/15/14
Date

Director
Title

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

**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**

OMB No 1545-0047

2013

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

▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at www.irs.gov/form990.**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 foundationCheck 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, total 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 total 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 its Form 990-PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization The Westfield Insurance Foundation	Employer identification number 20-3816760
---	---

Part I **Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	Old Guard Insurance Company PO Box 5001 Westfield Center, OH 44251-5001	\$ 3,190,044	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
2	Westfield Insurance Company PO Box 5001 Westfield Center, OH 44251-5001	\$ 1,812,096	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

WESTFIELD INSURANCE FOUNDATION
EIN 20-3816760
2013 990-PF
SCHEDULE 1

Part I, Line 16c: Other professional fees

Consulting - General	\$ 36,385
Regulatory Fees - Other	<u>\$ 9,294</u>
Total Other Professional Fees	<u>\$ 45,679</u>

WESTFIELD INSURANCE FOUNDATION
EIN 20-3816760
2013 990-PF
SCHEDULE 2

Part I, Line 23: Other expenses

Bank Fees	\$	30
Insurance	\$	1,019

Total Other Expenses	\$	<u>1,049</u>
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WESTFIELD INSURANCE FOUNDATION
EIN 20-3816760
2013 990-PF
SCHEDULE 3

Beginning of Year	End of Year	
	Book Value	Fair
(End of Year Market Value)	(End of Year Market Value)	Market Value
12/31/2012	12/31/2013	12/31/2011
(column a)	(column b)	(column c)

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

JP Morgan US Govt Institutional	131,709	254,329	254,329
---------------------------------	---------	---------	---------

Part II, Line 10a: Investments - US and State Government Obligations:

Ishares - (Lehman) Barclays TIPS Bd Fd	325,379	426,412	426,412
Ishares - GS\$ Investop Corp Bd	1,539,235	2,411,879	2,411,879
Ishares - (Lehman) Barclays 7-10 Yr Treasury Bd Fd	450,383	614,296	614,296
Ishares - Core Total US Bond Mkt	605,164	952,336	952,336
	<u>2,920,161</u>	<u>4,404,923</u>	<u>4,404,923</u>

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

Ishares - MSCI EAFE Index Fund	1,830,437	2,810,744	2,810,744
Ishares - Russell Midcap Value Idx Fd	1,537,947	2,300,639	2,300,639
Ishares - Russell Midcap Growth Idx Fd	935,218	1,458,753	1,458,753
Ishares - Russell 1000 Value - Large Cap	1,203,787	1,914,570	1,914,570
Ishares - Russell 1000 Growth - Large Cap	890,402	1,503,781	1,503,781
Ishares - DJ US Real Estate	711,241	1,053,310	1,053,310
Ishares - S&P Smallcap 600 Val	1,758,579	2,679,697	2,679,697
Ishares - S&P Smallcap 600 Gro	904,438	1,424,743	1,424,743
Vanguard - Emerging Market ETF	1,017,689	1,507,946	1,507,946
	<u>10,789,738</u>	<u>16,654,183</u>	<u>16,654,183</u>

WESTFIELD INSURANCE FOUNDATION
 EIN 20-3816760
 2013 990-PF
 SCHEDULE 4

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

#		How	Date	Date	Sales		Gain/
Shares	Property Description	Acquired	Acquired	Sold	Price	Cost	(Loss)
2,500	Ishares Russell Midcap Value Idx Fd	Purchase	6/29/2011	Various	155,322	118,556	36,766
1,000	Ishares Russell Midcap Growth Idx Fd	Purchase	6/29/2011	6/7/2013	72,807	61,235	11,572
2,450	Ishares S&P Smallcap 600 Val	Purchase	6/30/2011	Various	244,310	181,850	62,460
1,550	Ishares S&P Smallcap 600 Gro	Purchase	6/30/2011	Various	161,294	124,472	36,822
53,000	McDonald's Corp	Donation	12/18/2013	12/18/2013	5,070,210	5,002,140	68,070
293,861	JPMorgan - US Govt Agency Shares	Purchase	9/28/2012	Various	293,861	293,861	-
<u>354,361</u>					<u>5,997,804</u>	<u>5,782,114</u>	<u>215,690</u>

WESTFIELD INSURANCE FOUNDATION
 EIN 20-3816760
 2013 990-PF
 SCHEDULE 5

PART X: Minimum Investment Return

Line 1a: Average FMV of Securities

Assets Held More Than One Year			FMV 12/31/2012	FMV 12/31/2013	AVERAGE FMV 12/31/2013
2,680 shares	Ishares - Barclays TIPS Bd Fd		325,379	294,532	309,955
5,448 shares	Ishares - Core Total US Bond Mkt		599,832	579,831	589,831
12,722 shares	Ishares - GS\$ Investop Corp Bd		1,500,276	1,452,700	1,476,488
4,190 00 shares	Ishares - Barclays 7-10 Yr Treasury Bd Fd		450,383	415,816	433,099
32,192 00 shares	Ishares - MSCI EAFE Index Fund		1,784,949	2,159,922	1,972,436
28,112 shares	Ishares - Russell Midcap Value Index Fund		1,537,947	1,847,240	1,692,593
13,892 shares	Ishares - Russell Midcap Growth Index Fund		916,378	1,171,929	1,044,153
16,531 shares	Ishares - Russell 1000 Value - Large Cap		1,160,095	1,558,257	1,359,176
13,596 shares	Ishares - Russell 1000 Growth - Large Cap		890,402	1,168,576	1,029,489
10,498 shares	Ishares - DJ US Real Estate		678,906	662,214	670,560
19,285 shares	Ishares - S&P Smallcap 600 - Value		1,758,579	2,145,649	1,952,114
9,212 shares	Ishares - S&P Smallcap 600 - Growth		904,438	1,092,635	998,537
22,854 shares	Vanguard Emerging Market Fund		986,518	940,214	963,366
131,709 shares	JPMorgan US Govt Agency Shares		131,709	131,709	131,709
322,921					14,623,507
Assets Held Less Than One Year			DAYS HELD	FMV	AVERAGE FMV
400 shares	Ishares - Barclays TIPS Bd Fd		341	43,960	41,069
800 shares	Ishares - Barclays TIPS Bd Fd		12	87,920	2,891
500 shares	Ishares - Core Total US Bond Mkt		341	53,215	49,716
1,000 shares	Ishares - Core Total US Bond Mkt		208	106,430	60,651
2,000 shares	Ishares - Core Total US Bond Mkt		12	212,860	6,998
800 shares	Ishares - GS\$ Investop Corp Bd		340	91,350	85,093
5,600 shares	Ishares - GS\$ Investop Corp Bd		12	639,453	21,023
2,000 shares	Ishares - GS\$ Investop Corp Bd		208	228,376	130,143
1,500 shares	Ishares - Barclays 7-10 Yr Treasury Bd Fd		12	148,860	4,894
500 shares	Ishares - Barclays 7-10 Yr Treasury Bd Fd		335	49,620	45,542
9,700 shares	Ishares - MSCI EAFE Index Fund		12	650,823	21,397
6,900 shares	Ishares - Russell Midcap Value Index Fund		12	453,399	14,906
1,000 shares	Ishares - Russell Midcap Value Index Fund		158	58,829	25,466
1,500 shares	Ishares - Russell Midcap Value Index Fund		325	96,493	85,919
3,400 shares	Ishares - Russell Midcap Growth Index Fund		12	286,824	9,430
1,000 shares	Ishares - Russell Midcap Growth Index Fund		158	72,807	31,517
3,800 shares	Ishares - Russell 1000 Value - Large Cap		12	357,846	11,765
3,900 shares	Ishares - Russell 1000 Growth - Large Cap		12	335,205	11,020
5,700 shares	Ishares - DJ US Real Estate		12	359,556	11,821
4,800 shares	Ishares - S&P Smallcap 600 - Value		12	534,048	17,558
1,500 shares	Ishares - S&P Smallcap 600 - Value		158	141,786	61,376
950 shares	Ishares - S&P Smallcap 600 - Value		158	102,524	44,380
2,800 shares	Ishares - S&P Smallcap 600 - Growth		12	332,108	10,919
1,000 shares	Ishares - S&P Smallcap 600 - Growth		158	97,664	42,276
550 shares	Ishares - S&P Smallcap 600 - Growth		325	63,630 32	56,657
13,800 shares	Vanguard Emerging Market Fund		12	567,732	18,665
122,620 shares	JPMorgan US Govt Agency Shares		183	122,620	61,478
200,020					984,569
522,941	Total Part X, line 1a				15,608,076

Line 1b: Cash Balance Average

	Balance 12/31/2012	Balance 12/31/2013	Average Balance
Total Part X, line 1b	48,593	308,842	178,717
Total Part X, Line 1d			15,786,793

WESTFIELD INSURANCE FOUNDATION
 EIN 20-3816760
 2013 990-PF
 SCHEDULE 6

Organization	Address	City/State/Zip	Foundation Recipient	Reason for donation (990-PF)	Donation
Akron-Canton Regional Foodbank	350 Opportunity Parkway	Akron OH 44307	509(a)(1)	2012/2013 Annual Campaign	17 188 00
Akron-Canton Regional Foodbank	350 OPPORTUNITY PARKWAY	AKRON, OH 44307	509(a)(1)	General donation - volunteer grant	250 00
American Cancer Society	Finance Department	Atlanta GA 30303-1002	509(a)(1)	2012/2013 Annual Campaign	\$7 159 34
American Cancer Society Inc	1825 BARRETT LAKES BLVD SUITE 280	KENNESAW GA 30144	509(a)(1)	General donation - volunteer grant	500 00
American Heart Association	5455 N High Street	Columbus OH 43216-3548	509(a)(1)	2012/2013 Annual Campaign	13 045 29
Bandit's Adoption and Rescue of K-9s Inc	PO Box 1682	Glen Allen, VA 23995	509(a)(1)	General donation - volunteer grant	500 00
Birthcare of Medina County	620 EAST SMITH ROAD UNIT E-5A	MEDINA, OH 44256	509(a)(1)	Program to provide safety seats and cribs	5 890 00
Bluecoats of Medina County	39 PUBLIC SQ	MEDINA, OH 44256	509(a)(1)	General donation	250 00
Central Illinois Memorial Kidney Fund	PO BOX 235	MORTON, IL 61550	509(a)(1)	General Donation - volunteer grant	500 00
Central Pennsylvania Foodbank	3908 COREY RD	HARRISBURG PA 17109	509(a)(1)	GENERAL DONATION	2 500 00
Central Pennsylvania Foodbank	3908 Corey Road	Harrisburg PA 17109	509(a)(1)	2012/2013 Annual Campaign	794 00
Children's Center of Medina County	200 HIGHLAND DRIVE	MEDINA, OH 44256	509(a)(1)	General donation - volunteer grant	500 00
Cleveland Foodbank	15500 South Waterloo Rd	Cleveland OH 44110	509(a)(1)	2012/2013 Annual Campaign	521 34
Cleveland Housing Network	2999 Payne Ave Suite 306	Cleveland OH 44114	509(a)(1)	Y16 INITIATIVE Lease-Purchase program	10 000 00
Cleveland Leadership Center	1422 EUCLID AVENUE SUITE 940	CLEVELAND, OH 44115	509(a)(1)	General Donation	5 000 00
Cloverleaf Local School District	8525 Friendsville Rd	LODI OH 44254	509(a)(1)	School	19 340 00
Colorado Mountain Bike Association	P O BOX 280415	LAKEWOOD CO 80228	509(a)(2)	General donation - volunteer grant	250 00
Contemporary Youth Orchestra	P O BOX 181099	CLEVELAND HEIGHTS OH 44118	509(a)(2)	General donation - volunteer grant	500 00
Creston Canaan UMC	P O BOX 1111	CRESTON OH 44217	509(a)(1)	General donation - volunteer grant for S O U P Supper Program	250 00
Dare to Care Foodbank	P O Box 35458	Louisville KY 40232	509(a)(1)	2012/2013 Annual Campaign	793 25
Every Woman's House	104 SPINK ST	WOOSTER, OH 44691	509(a)(1)	General donation - volunteer grant	500 00
FAIR HOUSING OPPORTUNITIES OF NORTHWEST OHIO INC	432 N SUPERIOR STREET	TOLEDO OH 43604-1416	509(a)(1)	Annual meeting sponsorship	5 000 00
Fairfax Renaissance Development Corporation	2111 QUINCY AVE SUITE 100	CLEVELAND OH 44104	509(a)(1)	GRANDPARENT HOUSING	10 000 00
Foothills United Way	1285 Cimmaron Drive	Lafayette CO 80026	509(a)(1)	2012/2013 Annual Campaign	94 52
Freestore-Foodbank Inc	1141 Central Parkway	Cincinnati OH 45202	509(a)(1)	General Donation	500 00
Fund For Our Economic Future	1380 EAST NINTH ST SUITE 210	CLEVELAND OH 44114	509(a)(1)	General donation - 3/3 year commitment - membership	34 000 00
Gleaner's Foodbank of Indiana	37337 Waldemere Ave	Indianapolis, IN 46202	509(a)(1)	2012/2013 Annual Campaign	181 78
Great Trail Council	1601 S MAIN ST	AKRON OH 44309	509(a)(1)	General donation - volunteer grant for Medina County camp scholarship	500 00
Greater Twin Cities United Way	404 S Eighth Street	Minneapolis IN 55404	509(a)(1)	2012/2013 Annual Campaign	323 56
Habitat for Humanity of Greater Columbus	3140 WESTERVILLE ROAD	COLUMBUS OH 43224	509(a)(1)	"REBUILD" PROGRAM	2 500 00
Habitat for Humanity of Indianapolis	1101 E 22ND ST	INDIANAPOLIS IN 46202	509(a)(1)	2013 ADOPT-A-DAY PROGRAM	2 500 00
Habitat for Humanity of Kent County	425 PLEASANT STREET NW	GRAND RAPIDS MI 49503	509(a)(1)	EDUCATIONAL PARTNERSHIP	5 000 00
Habitat for Humanity of Medina County	342 East Smith Road	Medina OH 44256	509(a)(1)	HOME CONSTRUCTION	2 500 00
Habitat for Humanity of Metro Denver	3245 ELIOT ST	DENVER CO 80211	509(a)(1)	HOME CONSTRUCTION	2 500 00
Habitat for Humanity of Ohio	88 E BROAD ST STE 1800	COLUMBUS, OH 43215	509(a)(1)	2013 CONFERENCE	5 000 00
Habitat for Humanity of Summit County	2301 ROMIG RD	AKRON, OH 44320	509(a)(1)	Two frames for homes	15 000 00
Habitat for Humanity of Summit County	2301 ROMIG RD	AKRON OH 44320	509(a)(1)	HOME CONSTRUCTION	5 000 00
Habitat for Humanity of Wayne County	1451 SPRUCE STREET EXTENSION	WOOSTER, OH 44691	509(a)(1)	HOME CONSTRUCTION	5 000 00
Heart of Florida United Way	Dr Nelson Ying Center	Orlando FL 32804	509(a)(1)	2012/2013 Annual Campaign	72 71
Heart of West Michigan United Way	118 Commerce Ave SW	Grand Rapids MI 49503	509(a)(1)	2012/2013 Annual Campaign	132 33
INVEST	127 SOUTH PEYTON STREET	ALEXANDRIA, VA 22314	509(a)(2)	General Donation to support insurance education programs	15 000 00
Junior Achievement of North Central Ohio	1200 FIRESTONE PKWY 2 ND FLR PO BOX 26006	AKRON OH 44319	509(a)(1)	K-12 CLASSROOM SUPPORT	2 500 00
Lawrence County Career Center	750 PHELPS WAY	NEW CASTLE PA 16101	509(a)(1)	Donation for Participation in Taking the Lead (teen driver safety program)	3 000 00
Leadership Medina County	39 PUBLIC SQUARE SUITE 202	MEDINA, OH 44256	509(a)(2)	General donation - volunteer grant	500 00
Medina County 4H	9160 FIRESTONE RD	HOMERVILLE OH 44235	509(a)(1)	General donation - volunteer grant	500 00
Medina County 4-H Dog Program	120 W WASHINGTON ST, SUITE 1L	MEDINA, OH 44256	509(a)(1)	General donation - volunteer grant	500 00
Medina County Community Fund	3637 MEDINA RD	MEDINA, OH 44256	509(a)(1)	General donation - volunteer grant	500 00
Metro United Way	PO Box 4488	Louisville KY 40204	509(a)(1)	2012/2013 Annual Campaign	94 52
Mstar Foundation	19 Tournay Circle	Little Rock AR 72223	509(a)(1)	Teen Driver Safety programs	5 000 00
My Very Own Blanket	260 E BROADWAY	WESTERVILLE OH 43081	509(a)(1)	General donation - volunteer grant	500 00
Neighborhood Housing Services of Greater Cleveland	5700 BROADWAY AVENUE	CLEVELAND OH 44127	509(a)(1)	Home Ownership Center Homebuyer Education	5 000 00
Northern Illinois Foodbank	273 DEARBORN CT	GENEVA, IL 60134	509(a)(1)	GENERAL DONATION	2 500 00
Northern Illinois Foodbank	273 Dearborn Court	Geneva IL 60134	509(a)(1)	2012/2013 Annual Campaign	226 86
Northwest Ohio Development Association	432 N SUPERIOR ST	TOLEDO OH 43604-1416	509(a)(1)	Support for Individual Development Accounts	5 000 00
OhioHealth Corporation	180 E BROAD ST 33RD F1	COLUMBUS, OH 43215	509(a)(1)	Research Study of Advanced Driver Training for Teens	50 000 00
OhioHealth Corporation	180 E BROAD ST 33RD F1	COLUMBUS OH 43215	509(a)(1)	Research Study of Advanced Driver Training for Teens	50 000 00
Operation Homes	P O BOX 326	MEDINA, OH 44256	509(a)(1)	General donation - volunteer grant	500 00
Plymouth Square Foundation	1501 Euclid Ave Ste 200	Cleveland OH 44115	509(a)(1)	Westfield Insurance Studio Theatre 8/10-year pledge to Idea Center	300 000 00
Rebuilding Together of Greater Cuyahoga Valley	788 DeWald Ave	Akron OH 44306	509(a)(1)	SAFE AT HOME	25 000 00
Rebuilding Together of Pittsburgh	631 IRON CITY DR	PITTSBURGH PA 15205-4348	509(a)(1)	ADOPT A HOUSE	2 500 00
Second Harvest Food Bank of North Central Ohio	7445 Deer Trail Lane	Lorain, OH 44053	509(a)(1)	2012/2013 Annual Campaign	94 52
Second Harvest Foodbank of Central Florida	2008 Brengle Avenue	Orlando FL 32808	509(a)(1)	2012/2013 Annual Campaign	38 36
Second Harvest Heartland	1140 Gervais Ave	St Paul MN 55109	509(a)(1)	2012/2013 Annual Campaign	236 31
Second Harvest North Florida	4815 Philips Hwy	Jacksonville, FL 32207	509(a)(1)	2012/2013 Annual Campaign	94 52
Spanish American Committee	4407 LORAIN ROAD	CLEVELAND OH 44113	509(a)(1)	EMPLOYMENT TRAINING	5 000 00
Summit Christian School Inc	2800 13TH ST	CUYAHOGA FALLS, OH 44223	509(a)(1)	General donation - volunteer grant	400 00
The Highland Foundation for Educational Excellence	P O BOX 415	SHARON CENTER OH 44274	509(a)(1)	General donation - volunteer grant	500 00
Toledo Fair Housing Center	432 N SUPERIOR STREET	TOLEDO OH 43604-1416	509(a)(1)	RESTORING THE DREAM Foreclosure Prevention Program	5 000 00
United Way of Allegheny County	1250 Penn Avenue	Pittsburgh PA 15222	509(a)(1)	2012/2013 Annual Campaign	75 82
United Way of Ashland County	132 W Main Street	Ashland OH 44805	509(a)(1)	2012/2013 Annual Campaign	94 52
United Way of Central Ohio	360 S Third Street	Columbus OH 43215	509(a)(1)	2012/2013 Annual Campaign	37 81
United Way of Fairfield County	PO Box 2299	Lancaster, PA 43130	509(a)(1)	2012/2013 Annual Campaign	72 71
United Way of Forsyth County Inc	PO Box 1350	Cumming GA 30028	509(a)(1)	2012/2013 Annual Campaign	94 52
United Way of Greater Cincinnati	2400 Reading Road	Cincinnati, OH 45202	509(a)(1)	2012/2013 Annual Campaign	501 70
United Way of Greater Cleveland	1331 Euclid Ave	Cleveland OH 44115	509(a)(1)	2012/2013 Annual Campaign	1 102 28
United Way of Greater Knoxville	1301 Hannah Ave	Knoxville, TN 37921	509(a)(1)	2012/2013 Annual Campaign	94 52
United Way of Greater Richmond & Petersburg	P O Box 11807	Richmond VA 23230	509(a)(1)	2012/2013 Annual Campaign	756 20
United Way of Greater Stark County	4825 Higbee Ave NW	Canton OH 44718	509(a)(1)	2012/2013 Annual Campaign	2 750 62
United Way of Lancaster County	630 Janet Avenue	Lancaster PA 17601	509(a)(1)	2012/2013 Annual Campaign	471 17
United Way of Licking County	PO Box 4490	Newark OH 43058	509(a)(1)	2012/2013 Annual Campaign	381 73
United Way of Medina County	2573 Medina Road	Medina OH 44256	509(a)(1)	2012/2013 Annual Campaign	21 388 08
United Way of Metropolitan Atlanta	PO Box 2822	Atlanta GA 30303	509(a)(1)	2012/2013 Annual Campaign	181 77
United Way of Portage County	PO Box 845	Ravenna, OH 44286	509(a)(1)	2012/2013 Annual Campaign	94 52
United Way of Richland County	35 N Park Street	Mansfield OH 44802	509(a)(1)	2012/2013 Annual Campaign	94 52
United Way of Roane County	PO Box 317	Harriman TN 37748	509(a)(1)	2012/2013 Annual Campaign	47 26
United Way of Summit County	PO Box 1260	Akron OH 44309	509(a)(1)	2012/2013 Annual Campaign	2 281 82
United Way of Sumner County	1531 Hunt Club Boulevard	Gallatin, TN 37066	509(a)(1)	2012/2013 Annual Campaign	472 62
United Way of the Capital Region	2235 Millennium Way	Enola PA 17025	509(a)(1)	2012/2013 Annual Campaign	1 323 33
United Way of Walton County	PO Box 582	Monroe GA 30655	509(a)(1)	2012/2013 Annual Campaign	37 81
United Way of Wayne and Holmes Counties	215 S Walnut Street	Wooster OH 44691	509(a)(1)	2012/2013 Annual Campaign	1 535 66
United Way of Wayne-Holmes County	215 SOUTH WALNUT STREET	WOOSTER OH 44691	509(a)(1)	General donation - volunteer grant	360 00
University of Akron	302 BUCHTEL MALL	AKRON OH 44325	509(a)(1)	School	1 500 00
University of Akron	302 BUCHTEL MALL	AKRON OH 44325	509(a)(1)	School	1 500 00
University of Akron	302 BUCHTEL MALL	AKRON OH 44325	509(a)(1)	School	1 500 00
University of Akron Foundation	302 BUCHTEL MALL	AKRON OH 44325	509(a)(1)	School	1 500 00
USA Wrestling Ohio	2240 HOLLY LANE	AVON OH 44011	509(a)(2)	Accountancy Endowment Fund	500 00
Vineyard Christian Fellowship	6735 YORK ROAD	PARMA HEIGHTS OH 44130	509(a)(1)	General donation - volunteer grant	500 00
Wadsworth Public Library Foundation	132 BROAD ST	WADSWORTH OH 44281	509(a)(1)	General donation - volunteer grant for Food Pantry program	410 00
Wounded Warriors in Action Foundation	6516 DOLPHIN COVE DR	APOLLO BEACH FL 33572	509(a)(1)	General donation - volunteer grant	300 00
Young Entrepreneurs Academy Inc	175 CORPORATE WOODS STE 130	ROCHESTER NY 14623	509(a)(1)	General donation - volunteer grant	500 00
			509(a)(1)	Donation to support Medina County program	5 000 00
					708 000 00

WESTFIELD INSURANCE FOUNDATION
EIN 20-3816760
2013 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	600,000
OhioHealth Foundation 180 East Broad Street, 31st Floor Columbus, OH 43215	Support the Grant Medical Center Trauma Program	29,000
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

729,000

WESTFIELD INSURANCE FOUNDATION
EIN 20-3816760
2013 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>
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
Stuart Rosenberg PO Box 5001 Westfield Center, OH 44251	Director, 25 hrs/wk	0	0	0
Marianne Parkinson PO Box 5001 Westfield Center, OH 44251	Director, .25 hrs/wk	0	0	0



VOLUNTEER GRANT PROGRAM

Recognizing employees and the organizations they care about most

Will you volunteer for 25 or more hours this year?

In 2013, **23** Westfield employees did.
They volunteered a total of **3,059** hours!

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.

To see all past recipients, visit *WeCare* on the Intranet.

Guidelines and application on following pages.

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 **August 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 Rob Koszkalda,
community investment coordinator
ext 4308920 robertkoszkalda@westfieldgrp.com



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 _____ Leader _____
(City, State)

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 August 1, 2014: Volunteer Grant Program, One Park Circle, Westfield Center, OH 44251-5001 or to deborahanderson@westfieldgrp.com

Once the above form has been sent to the nonprofit contact, please follow up with nonprofit to ensure they have received the form and have submitted it completed to community investment Please contact Rob Koszkalda, community investment coordinator, 430-8920 or robertkoszkalda@westfieldgrp.com to ensure receipt of both applications