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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.

OMB No 1545-0052

2014

Open to Public Inspection

For calendar year 2014 or tax year beginning , 2014, 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) P.O. 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"/> 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"/> E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/> F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <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		
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ 23,776,338	J Accounting method: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	

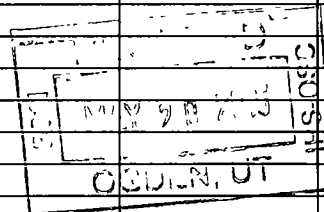
Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1	Contributions, gifts, grants, etc., received (attach schedule)	2,004,470			
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	494,009	494,009		
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10	57,693			
b	Gross sales price for all assets on line 6a 3,283,242				
7	Capital gain net income (from Part IV, line 2)		57,693		
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	2,556,172	551,702		
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) STATEMENT 1	64,174			
17	Interest				
18	Taxes (attach schedule) (see instructions) STATEMENT 1	13,089			
19	Depreciation (attach schedule) and depletion				
20	Occupancy				
21	Travel, conferences, and meetings				
22	Printing and publications				
23	Other expenses (attach schedule) STATEMENT 1	1,426			
24	Total operating and administrative expenses. Add lines 13 through 23	78,689			
25	Contributions, gifts, grants paid	1,216,196			1,113,721
26	Total expenses and disbursements. Add lines 24 and 25	1,294,885			1,113,721
27	Subtract line 26 from line 12:				
a	Excess of revenue over expenses and disbursements	1,261,287			
b	Net investment income (if negative, enter -0-)		551,702		
c	Adjusted net income (if negative, enter -0-)			NONE	

For Paperwork Reduction Act Notice, see instructions.

Cat No 11289X

Form **990-PF** (2014)

SCANNED MAY 26 2015 Revenue



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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		39,909	15,100	15,100
	2 Savings and temporary cash investments	STATEMENT 2	254,329	380,153	380,153
	3 Accounts receivable ▶	NONE			
	Less: allowance for doubtful accounts ▶	NONE	2,135	NONE	NONE
	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)		4,404,922	5,048,287	5,048,287
	b Investments—corporate stock (attach schedule)	STATEMENT 2	16,654,183	18,332,798	18,332,798
	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 ▶)		10,239	NONE	NONE
	16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)		21,365,717	23,776,338	23,776,338
	17 Accounts payable and accrued expenses		19,160	191	
	18 Grants payable		556,195	657,240	
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)		575,355	657,431	
	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. <input checked="" type="checkbox"/>				
	24 Unrestricted		20,790,362	23,118,907	
	25 Temporarily restricted				
	26 Permanently restricted				
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. <input type="checkbox"/>				
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)		20,790,362	23,118,907	
	31 Total liabilities and net assets/fund balances (see instructions)		21,365,717	23,776,338	

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	20,790,362
2 Enter amount from Part I, line 27a	2	1,261,287
3 Other increases not included in line 2 (itemize) ▶ UNREALIZED INVESTMENT GAIN	3	1,067,258
4 Add lines 1, 2, and 3	4	23,118,907
5 Decreases not included in line 2 (itemize) ▶	5	NONE
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	23,118,907

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 STATEMENT 3				
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	57,693
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.

(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))
2013	708,000	15,549,991	0.04553
2012	634,000	12,866,405	0.04928
2011	658,000	12,223,674	0.05383
2010	606,695	12,176,649	0.04982
2009	510,274	10,625,897	0.04802
2 Total of line 1, column (d)			2 0.24648
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 0.04930
4 Enter the net value of noncharitable-use assets for 2014 from Part X, line 5			4 22,253,011
5 Multiply line 4 by line 3			5 1,096,995
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 5,517
7 Add lines 5 and 6			7 1,102,512
8 Enter qualifying distributions from Part XII, line 4			8 1,113,721

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.

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 checked="" type="checkbox"/> and enter 1% of Part I, line 27b		1	5,517	
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	NONE	
3 Add lines 1 and 2		3	5,517	
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	NONE	
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	5,517	
6 Credits/Payments:				
a 2014 estimated tax payments and 2013 overpayment credited to 2014	6a 10,150			
b Exempt foreign organizations—tax withheld at source	6b NONE			
c Tax paid with application for extension of time to file (Form 8868)	6c NONE			
d Backup withholding erroneously withheld	6d NONE			
7 Total credits and payments. Add lines 6a through 6d	7 10,150			
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8 NONE			
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9 NONE			
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10 4,633			
11 Enter the amount of line 10 to be: Credited to 2015 estimated tax 4,633 Refunded 11 NONE				

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?	1a	✓
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>	1b	✓
c Did the foundation file Form 1120-POL for this year?	1c	✓
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>	2	✓
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>	3	✓
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	✓
b If "Yes," has it filed a tax return on Form 990-T for this year?	4b	
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>	5	✓
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?	6	✓
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>	7	✓
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>	8b	✓
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 2014 or the taxable year beginning in 2014 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i>	9	✓
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>	10	✓

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>330-887-0461</u>			
	Located at ► <u>P.O. BOX 5001, WESTFIELD CENTER, OH</u> ZIP+4 ► <u>44251-5001</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041—Check here. <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year ► <u>15</u>			
16	At any time during calendar year 2014, 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 FinCEN Form 114, (formerly 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)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	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 2014?	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 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014? <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 2014 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 2014.)	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 2014?	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 4945(d)(4)(A)? (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)?**5b**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**6b**

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

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No**b** If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? ☐ Yes ☒ No**7b****Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors****1** List all officers, directors, trustees, foundation managers and their compensation (see 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 STATEMENT 4				

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	STATEMENT 5	1a 22,564,385
b	Average of monthly cash balances	STATEMENT 5	1b 27,505
c	Fair market value of all other assets (see instructions)		1c
d	Total (add lines 1a, b, and c)		1d 22,591,889
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 22,591,889
4	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see instructions)		4 338,878
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4		5 22,253,011
6	Minimum investment return. Enter 5% of line 5		6 1,112,651

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 1,112,651
2a	Tax on investment income for 2014 from Part VI, line 5	2a 5,517	
b	Income tax for 2014. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b		2c 5,517
3	Distributable amount before adjustments. Subtract line 2c from line 1		3 1,107,134
4	Recoveries of amounts treated as qualifying distributions		4
5	Add lines 3 and 4		5 1,107,134
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 1,107,134

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 1,113,721
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 1,113,721
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 1,113,721

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 2013	(c) 2013	(d) 2014
1 Distributable amount for 2014 from Part XI, line 7				1,107,721
2 Undistributed income, if any, as of the end of 2014:				
a Enter amount for 2013 only				
b Total for prior years: 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2014:				
a From 2009				
b From 2010				4,473
c From 2011				53,784
d From 2012				
e From 2013				
f Total of lines 3a through e	58,257			
4 Qualifying distributions for 2014 from Part XII, line 4: ► \$ 1,113,721				
a Applied to 2013, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions)				
c Treated as distributions out of corpus (Election required—see instructions)				
d Applied to 2014 distributable amount				1,113,721
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2014 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	58,257			
b Prior years' undistributed income. Subtract line 4b from line 2b				
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				
d Subtract line 6c from line 6b. Taxable amount—see instructions				
e Undistributed income for 2013. Subtract line 4a from line 2a. Taxable amount—see instructions				
f Undistributed income for 2014. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2015				
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required—see instructions)				
8 Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions)				
9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a	58,257			
10 Analysis of line 9:				
a Excess from 2010				4,473
b Excess from 2011				53,784
c Excess from 2012				
d Excess from 2013				
e Excess from 2014				

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 2014, 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) 2014	(b) 2013	(c) 2012	(d) 2011	
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test—enter:					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test—enter $\frac{2}{3}$ of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test—enter:					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

SEE STATEMENT 6

- 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 ATTACHEMENT: COMMUNITY GRANT FUND GUIDELINES

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

SEE ATTACHEMENT: COMMUNITY GRANT FUND GUIDELINES

- c** Any submission deadlines:

SEE ATTACHEMENT: 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 ATTACHEMENT: 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 Paid during the year SEE STATEMENTS 7 AND 8				1,113,721
Total			▶	3a
b Approved for future payment SEE STATEMENT 8				740,250
Total			▶	3b

Enter gross amounts unless otherwise indicated.

Enter gross amounts unless otherwise indicated.				
	Unrelated business income		Excluded by section 512, 513, or 514	
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount
				(e) Related or exempt function income (See instructions)
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	494,009
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	57,693
9 Net income or (loss) from special events				
10 Gross profit or (loss) from sales of inventory				
11 Other revenue: a CONTRIBUTIONS			42	2,004,470
b _____				
c _____				
d _____				
e _____				
12 Subtotal. Add columns (b), (d), and (e)				2,556,172
13 Total. Add line 12, columns (b), (d), and (e)			13	2,556,172

(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	1a(1)	✓
	(2) Other assets	1a(2)	✓
b	Other transactions:		
	(1) Sales of assets to a noncharitable exempt organization	1b(1)	✓
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)	✓
	(3) Rental of facilities, equipment, or other assets	1b(3)	✓
	(4) Reimbursement arrangements	1b(4)	✓
	(5) Loans or loan guarantees	1b(5)	✓
	(6) Performance of services or membership or fundraising solicitations	1b(6)	✓
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c	✓
d	If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.		

[illegible]

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

b If "Yes," complete the following schedule.

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

**Sign
Here**

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

Signature of officer or trustee

5/11/15
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

2014

▶ 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, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 $\frac{1}{3}$ % support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions 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 an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled 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 totaling \$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	WESTFIELD INSURANCE COMPANY P.O. BOX 5001 WESTFIELD CENTER, OH 44251-5001	\$ 2,004,470	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.)
		\$	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)

Employer identification number

20-3816760

Part II

[illegible]

Name of organization THE WESTFIELD INSURANCE FOUNDATION	Employer identification number 20-3816760
---	---

Part III Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) ► \$

Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-----	----- ----- -----	----- ----- -----	----- ----- -----
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	----- ----- -----	----- ----- -----	

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-----	----- ----- -----	----- ----- -----	----- ----- -----
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	----- ----- -----	----- ----- -----	

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-----	----- ----- -----	----- ----- -----	----- ----- -----
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	----- ----- -----	----- ----- -----	

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-----	----- ----- -----	----- ----- -----	----- ----- -----
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	----- ----- -----	----- ----- -----	

WESTFIELD INSURANCE FOUNDATION
P.O. Box 5001
Westfield Center, Ohio 44251-5001
EIN: 20-3816760
Form 990-PF - Return of Private Foundation
For the Year Ended 12/31/2014

Part I, Line 16c: Other Professional Fees

Consulting - General	63,974
Regulatory Fees - Other	200
Total Other Professional Fees	<u>64,174</u>

Part I, Line 18: Taxes

Federal Income Tax	13,089
Other Taxes	-
Total Taxes	<u>13,089</u>

Part I, Line 23: Other Expenses

Bank Fees	191
Insurance	1,235
Total Taxes	<u>1,426</u>

WESTFIELD INSURANCE FOUNDATION
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For the Year Ended 12/31/2014

	Beginning of Year	End of Year	
	Book Value (Column A)	Book Value (Column B)	Fair Market Value (Column C)
Part II, Line 2: Savings and Temporary Cash Investments:			
JP Morgan US Govt Institutional	254,329	380,153	380,153
Total Savings and Temporary Cash Investments	254,329	380,153	380,153
Part II, Line 10a: Investments - US and State Government Obligations:			
Ishares - TIPS Bond Fund ETF	426,412	434,599	434,599
Ishares - Core US Aggregate Bond ETF	952,336	1,073,450	1,073,450
Ishares - IBOXX \$ Investment Grade Corp Bond ETF	2,411,879	2,725,175	2,725,175
Ishares - 7-10 Yr Treasury Bond Fund	614,296	815,063	815,063
Total Investments - US and State Government Obligations	4,404,923	5,048,287	5,048,287
Part II, Line 10b: Investments - Corporate Stock:			
Ishares - MSCI EAFE Index Fund	2,810,744	3,005,009	3,005,009
Ishares - Russell Midcap Value Index Fund	2,300,639	2,538,229	2,538,229
Ishares - Russell Midcap Growth Index Fund	1,458,753	1,602,810	1,602,810
Ishares - Russell 1000 Value - Large Cap	1,914,570	2,106,896	2,106,896
Ishares - Russell 1000 Growth - Large Cap	1,503,781	1,644,110	1,644,110
Ishares - DJ US Real Estate	1,053,310	1,283,074	1,283,074
Ishares - S&P Smallcap 600 Val	2,679,697	2,982,113	2,982,113
Ishares - S&P Smallcap 600 Gro	1,424,743	1,543,583	1,543,583
Vanguard - Emerging Market ETF	1,507,946	1,626,973	1,626,973
Total Investments - Corporate Stock	16,654,183	18,332,798	18,332,798

WESTFIELD INSURANCE FOUNDATION
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For the Year Ended 12/31/2014

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

Property Description	How Acquired	Date Acquired	Date Sold	Number of Shares	Sales Price	Cost	Gain/(Loss)
Ishares Russell Midcap Value Idx Fd	Purchase	12/20/2013	Various	1,700	123,352	110,230	13,122
Ishares Russell Midcap Growth Idx Fd	Purchase	12/20/2013	Various	900	80,559	74,585	5,974
Ishares Russell 1000 Value Large Cap	Purchase	12/20/2013	Various	950	98,358	88,469	9,889
Ishares Russell 1000 Growth Large Cap	Purchase	12/20/2013	Various	1,100	101,501	93,025	8,476
Ishares S&P Smallcap 600 Value	Purchase	12/20/2013	Various	1,300	150,660	141,904	8,756
Procter & Gamble Co Common	Donation	12/18/2014	12/18/2014	22,100	2,015,946	2,004,470	11,476
JPMorgan - US Govt Agency Shares	Purchase	Various	Various	352,512	352,512	352,512	-
Dreyfus Treasury Prime Cash Mgmt Shs	Purchase	5/30/2014	10/31/2014	360,354	360,354	360,354	-
Total Capital Gains and Losses for Tax on Investment Income				740,916	3,283,242	3,225,549	57,693

WESTFIELD INSURANCE FOUNDATION
P.O. Box 5001
Westfield Center, Ohio 44251-5001
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Form 990-PF - Return of Private Foundation
For the Year Ended 12/31/2014

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

Name and Address (Column A)	Title and Average Hours Devoted per Week (Column B)	Compensation (Column C)	Contributions to Employee Benefit Plans and Deferred Compensation (Column D)	Expense Account (Column E)
Joseph Kohmann P O Box 5001 Westfield Center, OH 44251	Director, 0 50 hrs/week	-	-	-
Jon Park P O Box 5001 Westfield Center, OH 44251	Director, 0 50 hrs/week	-	-	-
Edward Largent P O Box 5001 Westfield Center, OH 44251	Director, 0 50 hrs/week	-	-	-
James Clay P O Box 5001 Westfield Center, OH 44251	Director, 0 50 hrs/week	-	-	-
Jani Groza P O Box 5001 Westfield Center, OH 44251	Director, 40 hrs/week	-	-	-
Frank Carrino P O Box 5001 Westfield Center, OH 44251	Director, 1 hr/week	-	-	-
Stuart Rosenberg P O Box 5001 Westfield Center, OH 44251	Director, 0 25 hrs/week	-	-	-
Elizabeth Riczko P O Box 5001 Westfield Center, OH 44251	Director, 0 25 hrs/week	-	-	-
Michael Prandi P O Box 5001 Westfield Center, OH 44251	Director, 0 25 hrs/week	-	-	-

WESTFIELD INSURANCE FOUNDATION
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Form 990-PF - Return of Private Foundation
For the Year Ended 12/31/2014

PART X, Line 1a: Average Fair Market Value of Securities

Assets Held Less Than One Year:

Property Description	Transaction Type	Number of Shares	Days Held	FMV 12/31/2014	Average FMV
JPMORGAN - US GOVT AGENCY SHARES	PURCHASE	10,275	306	10,275	8,614
JPMORGAN - US GOVT AGENCY SHARES	PURCHASE	66,484	275	66,484	50,091
JPMORGAN - US GOVT AGENCY SHARES	PURCHASE	10,183	245	10,183	6,835
JPMORGAN - US GOVT AGENCY SHARES	PURCHASE	11,241	230	11,241	7,083
DREYFUS TRSRY PRIME CASH MGT - INSTITUTIONAL SHS	PURCHASE	891	215	891	525
JPMORGAN - US GOVT AGENCY SHARES	PURCHASE	0	198	0	0
DREYFUS TRSRY PRIME CASH MGT - INSTITUTIONAL SHS	PURCHASE	39,447	184	39,447	19,886
DREYFUS TRSRY PRIME CASH MGT - INSTITUTIONAL SHS	PURCHASE	125,343	153	125,343	52,541
DREYFUS TRSRY PRIME CASH MGT - INSTITUTIONAL SHS	PURCHASE	11,542	124	11,542	3,921
DREYFUS TRSRY PRIME CASH MGT - INSTITUTIONAL SHS	PURCHASE	183,567	92	183,567	46,269
DREYFUS TRSRY PRIME CASH MGT - INSTITUTIONAL SHS	PURCHASE	413	33	413	37
PROCTER & GAMBLE CO -	PURCHASE	22,100	1	2,010,216	5,507
ISHARES - CORE US AGGREGATE BD ETF	PURCHASE	800	8	88,096	1,931
ISHARES - IBOX \$ INVT GRADE CORP BD ETF	PURCHASE	1,700	8	202,997	4,449
ISHARES - 7-10 YR TREAS BD ETF	PURCHASE	1,500	8	158,985	3,485
ISHARES - MSCI EAFE IDX FD	PURCHASE	7,500	8	456,300	10,001
ISHARES - RUSSELL MIDCAP VALUE IDX FD	PURCHASE	1,100	8	81,136	1,778
ISHARES - RUSSELL MIDCAP GROWTH IDX FD	PURCHASE	800	8	74,584	1,635
ISHARES - RUSSELL 1000 VALUE ETF	PURCHASE	800	8	83,520	1,831
ISHARES - RUSSELL 1000 GROWTH ETF	PURCHASE	800	8	76,488	1,676
ISHARES - S&P SMALLCAP 600 VALUE	PURCHASE	2,500	8	294,862	6,463
ISHARES - S&P SMALLCAP 600 GROWTH	PURCHASE	600	8	73,434	1,610
VANGUARD - EMERGING MARKET ETF	PURCHASE	4,000	8	160,080	3,509
DREYFUS TRSRY PRIME CASH MGT - INSTITUTIONAL SHS	PURCHASE	379,304	-	379,304	-
JPMORGAN - US GOVT AGENCY SHARES	SALE	251,621	31	251,621	21,371
ISHARES - S&P SMALLCAP 600 VALUE	SALE	1,300	71	150,660	29,306
JPMORGAN - US GOVT AGENCY SHARES	SALE	100,891	150	100,891	41,462
JPMORGAN - US GOVT AGENCY SHARES	SALE	0	170	0	0
ISHARES - RUSSELL MIDCAP VALUE IDX FD	SALE	1,700	262	123,352	88,543
ISHARES - RUSSELL 1000 VALUE ETF	SALE	950	262	98,358	70,602
ISHARES - RUSSELL MIDCAP GROWTH IDX FD	SALE	900	266	80,559	58,709
ISHARES - RUSSELL 1000 GROWTH ETF	SALE	1,100	302	101,501	83,982
DREYFUS TRSRY PRIME CASH MGT - INSTITUTIONAL SHS	SALE	360,354	304	360,354	300,130
PROCTER & GAMBLE CO -	SALE	22,100	-	2,015,946	-
Total: Assets Held Less than One Year				7,882,631	933,782

Assets Held More Than One Year:

Property Description	Number of Shares	FMV 12/31/2014	Average FMV
ISHARES - TIPS BD FD ETF	3,880	434,599	434,599
ISHARES - CORE US AGGREGATE BOND ETF	8,948	985,354	985,354
ISHARES - IBOX \$ INVT GRADE CORP BD ETF	21,122	2,522,178	2,522,178
ISHARES - 7-10 YR TREAS BD ETF	6,190	656,078	656,078
ISHARES - MSCI EAFE IDX FUND	41,892	2,548,709	2,548,709
ISHARES - RUSSELL MIDCAP VALUE IDX FD	33,312	2,457,093	2,457,093
ISHARES - RUSSELL MIDCAP GROWTH IDX FD	16,392	1,528,226	1,528,226
ISHARES - RUSSELL 1000 VALUE LARGE CAP	19,381	2,023,376	2,023,376
ISHARES - RUSSELL 1000 GROWTH LARGE CAP	16,396	1,567,622	1,567,622
ISHARES - DJ US REAL ESTATE	16,698	1,283,074	1,283,074
ISHARES - S&P SMALLCAP 600 VALUE	22,784	2,687,251	2,687,251
ISHARES - S&P SMALLCAP 600 GROWTH	12,012	1,470,149	1,470,149
VANGUARD - EMERGING MARKET ETF	36,654	1,466,893	1,466,893
DREYFUS TRSRY PRIME CASH MGT - INSTITUTIONAL SHS	-	-	-
Total: Assets Held More than One Year	255,661	21,630,603	21,630,603
Total: Average FMV of Securities			22,564,385

PART X, Line 1b: Average of Monthly Cash Balances

Property Description	FMV 12/31/2013	FMV 12/31/2014	Average FMV
Cash - Checking	39,909	15,100	27,505
Total: Average of Monthly Cash Balances	39,909	15,100	27,505

WESTFIELD INSURANCE FOUNDATION

P.O. Box 5001

Westfield Center, Ohio 44251-5001

EIN: 20-3816760

Form 990-PF - Return of Private Foundation

For the Year Ended 12/31/2014

PART XV, Line 1a: Information Regarding Foundation Managers:

1	Ohio Farmers Insurance Company	34-0438190	Parent	
2	Westfield Insurance Company	34-6516838	Subsidiary	100% owned by #1
3	Westfield National Insurance Company	34-1022544	Subsidiary	100% owned by #1
4	American Select Insurance Company	31-6016426	Subsidiary	100% owned by #1
5	Old Guard Insurance Company	23-0929640	Subsidiary	100% owned by #1

PART IV Line 3 Grants and Contributions Paid During the Year or Approved for Future Payment

Part A Paid During the Year

Organization	Address	City/State/Zip	Foundation Status of Recipient	Reason for donation (990-PF)	Donation
Akron-Canton Regional Foodbank	350 Opportunity Parkway	Akron, OH 44307	508(a)(1)	2013/2014 Annual Campaign	26 108
Akron-Canton Regional Foodbank	350 Opportunity Parkway	Akron, OH 44307	508(a)(1)	2013/2014 Annual Campaign	1 250
Akron-Canton Regional Foodbank	350 Opportunity Parkway	Akron, OH 44307	508(a)(1)	General Donation	22 877
American Cancer Society	France Department	Atlanta GA 30303-1002	508(a)(1)	2013/2014 Annual Campaign	500
American Cancer Society	1625 Barrett Lakes Blvd Suite 280	Kennesaw GA 30144	508(a)(1)	General Donation	12 142
American Heart Association	5455 N High Street	Columbus, OH 43216-3549	508(a)(1)	2013/2014 Annual Campaign	1 500
American University	4400 Massachusetts Ave NW	Washington DC 20016	School	WAA Scholarship Caroline M. Ollabaugh	400
Astronomy Club of Akron	588 Fairwood Road	New Franklin OH 44319	508(a)(2)	General Donation	250
Bluecoats of Medina County Inc	38 Public Square	Medina OH 44256	508(a)(1)	General donation	500
Buckeye Council Boy Scouts of America	2301 13th St NW	Canton OH 44708	508(a)(1)	Towards camper scholarships for Wooster OH scouts	500
Buckeye Council Boy Scouts of America	2301 13th St NW	Canton OH 44708	508(a)(1)	Towards Camper Scholarships for Canton & Massillon Ohio scouts	500
Catholic Free Will Baptist Church	12723 Cleveland Rd	Canton OH 44317	Church	Towards Caring Care for Christ Ministry	400
Carnegie Mellon University	500 Forbes Avenue	Pittsburgh PA 15213	School	WAA Scholarship Michael Shemko	1 500
Central Pennsylvania Food Bank	3908 Corey Road	Harrisburg PA 17109	508(a)(1)	2013/2014 Annual Campaign	1 192
Central Pennsylvania Food Bank	3908 Corey Road	Harrisburg PA 17109	508(a)(1)	Westfield Insurance volunteer day	500
Cleveland Foodbank	15500 South Waterloo Rd	Cleveland OH 44110	508(a)(1)	2013/2014 Annual Campaign	1 775
Cleveland Housing Network Inc	2999 Payne Ave Suite 306	Cleveland OH 44114	508(a)(1)	General Donation	250
Cleveland Housing Network Inc	2999 Payne Ave Suite 306	Cleveland OH 44114	508(a)(1)	Y16 INITIATIVE Lease-Purchase program	10 000
College Now Greater Cleveland Inc	50 Public Square Suite 1800	Cleveland OH 44112	508(a)(1)	General Donation	250
Dave to Care Foodbank	P.O. Box 35458	Louisville KY 40232	508(a)(1)	2013/2014 Annual Campaign	1 221
Downtown Akron Partnership	103 S. High Street, 4th Floor	Akron OH 44308	508(a)(1)	General Donation	500
Duke University	Box 90758	Durham NC 27708	School	Seavanna Hershman Outside Scholarship ID#0817498	750
Economic Growth Foundation	1240 Huron Rd E Suite 300	Cleveland OH 44115	508(a)(1)	Support of the Regional Competitiveness Strategy work	20 000
Fair Housing Opportunities of Northwest Ohio Inc	432 North Superior Street	Toledo OH 43604	508(a)(1)	Restoring the Dream Foreclosure Prevention Program	5 000
Fair Housing Advocates Association	520 S Main St Ste 2541J	Akron OH 44311	508(a)(2)	General Donation	5 000
Fair Housing Opportunities of Northwest Ohio Inc	432 North Superior Street	Toledo OH 43604	508(a)(1)	General Donation	250
Farfax Renaissance Development Corporation	8111 Quincy Ave Suite 100	Cleveland OH 44104	508(a)(1)	General Donation	250
Farfax Renaissance Development Corporation	8111 Quincy Ave Suite 100	Cleveland OH 44104	508(a)(1)	Grandparent Housing	10 000
Food Bank of Northeast Georgia	P.O. Box 48857 861 Newton Bridge Road	Athens GA 30604	508(a)(1)	2013/2014 Annual Campaign	100
Foothills United Way	1285 Cimarron Drive Suite 101	Boulder CO 80026	508(a)(1)	2013/2014 Annual Campaign	130
Fund for Our Economic Future	1360 East 9th Street Suite 210	Cleveland OH 44114	508(a)(1)	General donation- 1/2 year commitment-Membership	68 000
Fund for Our Economic Future	1360 East 9th Street Suite 210	Cleveland OH 44114	508(a)(1)	General Donation	250
Greater Twin Cities United Way	1801 S Main St	Akron OH 44313	508(a)(1)	Towards camper scholarships for Akron Ohio scouts	500
Habitat for Humanity - Greater Columbus	404 S. Eighth Street	Minneapolis IN 55404	508(a)(1)	2013/2014 Annual Campaign	1 124
Habitat for Humanity International Inc	3140 Westerville Rd	Columbus OH 43224	508(a)(1)	"REBUILD" Program	2 500
Habitat for Humanity of Greater Indianapolis Inc	1451 Spruce St. Ext	Wooster OH 44681	508(a)(1)	Home Construction	5 000
Habitat for Humanity of Kent County	3135 N Meridian St	Indianapolis IN 46208	508(a)(1)	Adopt A-Day Program	5 000
Habitat for Humanity of Medina County	539 New Ave SW	Grand Rapids MI 49503	508(a)(1)	Educational Partnership	5 000
Habitat for Humanity of Metro Denver Inc	342 East Smith Road	Medina OH 44256	508(a)(1)	Home Construction	2 500
Habitat for Humanity of Ohio	3245 Elliot Street	Denver CO 80211	508(a)(1)	Home Construction	5 000
Habitat for Humanity of Summit County Inc	68 E Broad St Ste 1800	Columbus OH 43215	508(a)(1)	Conference scholarship	250
Habitat for Humanity of Summit County Inc	2301 Romig Road	Akron OH 44320	508(a)(1)	Home Construction	15 000
Habitat for Humanity of Summit County Inc	2301 Romig Road	Akron OH 44320	508(a)(1)	Parking Lot Build	8 320
Hammer & Nails Inc	908 12th St NW	Canton OH 44703	508(a)(1)	General Donation	300
Harmory Helpers	P.O. Box 956	Medina OH 44256	508(a)(1)	General Donation	300
Heart of Florida United Way	Dr Nelson Ying Center	Orlando FL 32804	508(a)(1)	2013/2014 Annual Campaign	50
Heart of West Michigan United Way	118 Commerce Ave SW	Grand Rapids MI 49503	508(a)(1)	2013/2014 Annual Campaign	588
Highland Foundation for Educational Excellence Inc	PO Box 415	Sharon Center OH 44274	508(a)(1)	General Donation	500
Indiana Wesleyan University	4201 South Washington Street	Marion IN 46953-4974	School	WAA Scholarship Caleb Ostrander	1 500
Insurance and Risk Management Institute BGSU	Bowling Green State Univ 201 BA Bldg	Bowling Green OH 43403	School	Charter membership and four years membership	30 000
International Hope & Heritage Inc	PO Box 2196	Rockwall TX 75087	508(a)(1)	General Donation	500
INVEST	127 South Peyton Street	Alexandria VA 22314	508(a)(2)	General donation to support insurance education programs	20 000
Junior Achievement of North Central Ohio	PO Box 26006	Akron OH 44318	508(a)(1)	K-12 Classroom Support	2 500
Kent State University Foundation	P.O. Box 5190	Kent OH 44242	508(a)(1)	Westfield Insurance Education Endowment	150 000
Main Street Medina	5 Public Square	Medina OH 44256	508(a)(2)	Sponsorship of Pizza Palooza showcase of nonprofit social services organizations	2 500
Meals from the Heartland	11160 Aurora Ave Building 13	Urbanside IA 50322	508(a)(1)	Westfield Insurance volunteer day	500
Medina City Schools Foundation	738 Weymouth Rd PO Box 1035	Medina OH 44256	508(a)(1)	General Donation	400
Medina County 4-H	9180 Firestone Road	Homerville OH 44235	508(a)(1)	General Donation	500
Miami University	301 S Campus Avenue Room 107	Oxford OH 45056-3439	School	WAA Scholarship Jacob Vaughn	1 500
Michelle's Leading Star Foundation Inc	5250 NE 18th Avenue	Fort Lauderdale FL 33334	508(a)(1)	Teen Driver Safety Programs	5 000
Mid-Ohio Foodbank	3560 Brookham Drive	Grove City OH 43123	508(a)(1)	2013/2014 Annual Campaign	28
Minds Matter of Cleveland	P.O. Box 14219	Cleveland OH 44114	508(a)(1)	General Donation	500
Mohican Church of the Brethren	7759 N. Elyria Rd	West Salem OH 44287	Church	Donation to The Grocery Bag Ministry	360
My Very Own Blanket	175 E Broadway Ave	Westerville OH 43081	508(a)(1)	General Donation	450
Neighborhood Housing Services of Greater Cleveland Inc	5700 Broadway Avenue	Cleveland OH 44127	508(a)(1)	General Donation	250
Neighborhood Housing Services of Greater Cleveland Inc	5700 Broadway Avenue	Cleveland OH 44127	508(a)(1)	Home Ownership Center Homebuyer Education	5 000
Northeast Ohio Dance Inc	124 College Street	Wadsworth OH 44281	508(a)(2)	General Donation	500
Northern Illinois Foodbank	273 Dearborn Court	Geneva IL 60134	508(a)(1)	2013/2014 Annual Campaign	315
Northwest Ohio Development Agency	432 North Superior Street	Toledo OH 43604	508(a)(1)	General Donation	250
Northwest Ohio Development Agency	432 North Superior Street	Toledo OH 43604	508(a)(1)	Support for Individual Development Accounts	5 000
Northwest Ohio Development Agency	432 N Superior St	Toledo OH 43604	508(a)(1)	MLK Inclusive Community Enhancement Program	50 000
Ohio Northern University	525 South Main Street	Ada OH 45810	School	WAA Scholarship James Philip Crawford	1 500
OhioHealth Corporation	180 East Broad Street 33rd Floor	Columbus OH 43215	508(a)(1)	Research Study of Advanced Driver Training for Teens	84 375
Operation N O M E S	P.O. Box 328	Medina OH 44256	508(a)(1)	General Donation	500
Playhouse Square Foundation	1501 Euclid Avenue Suite 200	Cleveland OH 44115	508(a)(1)	Westfield Insurance Studio Theatre 9/10-year pledge to Idea Center	300 000
Potter Children's Home and Family Ministries	2350 Nashville Rd	Bowling Green KY 42101	508(a)(1)	General Donation	500
Project Learn	105 W Liberty Street Lower	Medina OH 44256	508(a)(1)	General Donation	500
Rebuilding Together Pittsburgh	631 Iron City Drive	Pittsburgh OH 15205	508(a)(1)	Westfield Insurance Volunteer Day	2 500
Ringsold High School	1 Ram Drive	Monongahela PA 15063	School	Donation for Participation in Taking the Lead (teen driver safety program)	3 000
Roadrunner Food Bank Inc	5640 Office Blvd NE	Albuquerque NM 87109	508(a)(1)	General donation in honor of Westfield Insurance and HUB International Volunteer Day	500
Save Ohio State	PO Box 145	Westerville OH 44282	508(a)(1)	General Donation	400
Second Harvest Food Bank of Middle Tennessee	331 Great Circle Road	Nashville TN 37228	508(a)(1)	2013/2014 Annual Campaign	338
Second Harvest Food Bank of Middle Tennessee	331 Great Circle Road	Nashville TN 37228	508(a)(1)	Westfield Insurance Volunteer Day	500
Second Harvest Food Bank of North Central Ohio	7445 Deer Trail Lane	Lorain OH 44053	508(a)(1)	2013/2014 Annual Campaign	130
Second Harvest Food Bank of the Mahoning Valley	2805 Salt Springs Road	Youngstown OH 44509	508(a)(1)	2013/2014 Annual Campaign	84
Second Harvest Foodbank of Central Florida	411 Mercy Drive	Orlando FL 32805	508(a)(1)	2013/2014 Annual Campaign	25
Second Harvest Heartland	1140 Gervais Ave	St. Paul MN 55108	508(a)(2)	2013/2014 Annual Campaign	400
Spanish American Committee for a Better Community	4407 Lorain Ave	Cleveland OH 44113	508(a)(1)	General Donation	250
Spanish American Committee for a Better Community	4407 Lorain Ave	Cleveland OH 44113	508(a)(1)	Employment Training	5 000
Special Olympics Florida - Clay County	P.O. Box 2680	Orange Park FL 32067	508(a)(1)	General Donation	500
St. Ambrose Church	829 Pearl Rd	Brunswick OH 44212	Church	Towards the Community Meal Program	300
Stanford University	355 Galvez Street	Stanford CA 94305-6106	School	WAA Scholarship Nicole Foltmann	1 500
Summit Christian School	2800 13th St	Cuyahoga Falls OH 44223	508(a)(1)	General Donation	500
Summit Cycling Center	530 South Main Street	Akron OH 44311	508(a)(2)	General Donation	500
Team NEO Foundation	737 Belvoir Road	Cleveland OH 44115	508(a)(3)	General Donation to Cleveland Plus	250
The American Institute for Chartered Property Casualty Underwriters	720 Providence Road	Malvern PA 18355	508(a)(1)	Institute Development Fund Contribution	12 858
The Contemporary Youth Orchestra	P.O. Box 181089	Cleveland Heights OH 44118	508(a)(2)	General Donation	500
The Griffith Insurance Education Foundation	720 Providence Road	Malvern PA 18355	508(a)(2)	WIF portion of Westfield Insurance/WAA Scholarship program	25 200
The Ohio State University	Student Acad Svcs Bldg 281 W Lane Ave	Columbus OH 43210	School	WAA Scholarship Nabeel Memon	1 500
The Salvation Army	425 W Liberty St	Medina OH 44256	508(a)(1)	General Donation	500
The Strand Theater Initiative	119 North Main Street	Zanesville PA 16803	508(a)(1)	General Donation	360
The United Way of Union County Inc	P.O. Box 145	Westerville OH 43040-0145	508(a)(1)	2013/2014 Annual Campaign	100
The University of Akron Foundation	Attn Cynthia Sheeks	Akron OH 44325-2603	School	CBA Dean's Advancement Council	2 000
The University of Akron Foundation	Attn Cynthia Sheeks	Akron OH 44325-2603	School	CBA Center for Information Technology and eBusiness-Advisory Board dues	1 500
The University of Akron Foundation	Attn Cynthia Sheeks	Akron OH 44325-2603	School	CBA The George W. Davis School of Accountancy-Advisory Board dues/endowment	2 000
The University of Oklahoma	1000 ASP Ave Room 105	Norman OK 73019	School	WAA Scholarship Lauren McGraw	1 500
The University of Tennessee	211 Student Services Bldg	Knoxville TN 37896-0225	School	WAA Scholarship Andrew Warren Henry	1 500
Toledo Fair Housing Center	432 North Superior Street	Toledo OH 43604	508(a)(1)	Support for the Start of Fair Housing Awards Luncheon on 4/24/14	5 000
United Way for Southeastern Michigan	669 Woodward Avenue Ste 300	Detroit MI 48226	508(a)(1)	General Donation	260
United Way of Ashland County	132 W Main Street	Ashland OH 44805	508(a)(1)	2013/2014 Annual Campaign	890
United Way of Central Ohio	360 S Third Street	Columbus OH 43215	508(a)(1)	2013/2014 Annual Campaign	182
United Way of Fairfield County	PO Box 2299	Lancaster PA 43130	508(a)(1)	2013/2014 Annual Campaign	39
United Way of Forsyth County Inc	PO Box 1350	Cumming GA 30028	508(a)(1)	2013/2014 Annual Campaign	100
United Way of Greater Cincinnati	2400 Reading Road	Cincinnati OH 45202	508(a)(1)	2013/2014 Annual Campaign	590
United Way of Greater Cleveland	1331 Euclid Ave	Cleveland OH 44115	508(a)(1)	2013/2014 Annual Campaign	3 645
United Way of Greater Cleveland	1331 Euclid Ave	Cleveland OH 44115	508(a)(1)	General Donation	250
United Way of Greater Lorain County Inc	1875 N Ridge Rd E Ste H	Lorain OH 44055	508(a)(1)	2013/2014 Annual Campaign	10
United Way of Greater Stark County	4825 Higbee Ave NW	Canton OH 44718	508(a)(1)	2013/2014 Annual Campaign	3 415

PART XV, Line 3 Grants and Contributions Paid During the Year or Approved for Future Payment

Part A Paid During the Year

Organization	Address	City/State/Zip	Foundation Status of Recipient	Reason for donation (990-PF)	Donation
United Way of Lancaster County	630 Janet Avenue	Lancaster PA 17601	509(a)(1)	2013/2014 Annual Campaign	1,208
United Way of Medina County	2573 Medina Road	Medina OH 44256	509(a)(1)	2013/2014 Annual Campaign	32,589
United Way of Medina County	2573 Medina Road	Medina OH 44256	509(a)(1)	General Donation	250
United Way of Medina County	2573 Medina Road	Medina OH 44256	509(a)(1)	General Donation	250
United Way of Medina County	2573 Medina Road	Medina OH 44256	509(a)(1)	Employing Medina County	50,000
United Way of Metropolitan Atlanta Inc	PO Box 2622	Atlanta GA 30303	509(a)(1)	2013/2014 Annual Campaign	329
United Way of Portage County	PO Box 845	Ravenna OH 44266	509(a)(1)	2013/2014 Annual Campaign	520
United Way of Summit County	90 North Prospect Street	Akron OH 44304	509(a)(1)	2013/2014 Annual Campaign	3,420
United Way of Sumner County	1531 Hunt Club Boulevard Suite 110	Gallatin TN 37066	509(a)(1)	2013/2014 Annual Campaign	338
United Way of the Capital Region	2235 Millenium Way	Enola PA 17025	509(a)(1)	2013/2014 Annual Campaign	1,850
United Way of Warren County Ohio	645 Oak Street	Labaron OH 45036	509(a)(1)	2013/2014 Annual Campaign	260
United Way of Wayne and Holmes Counties	215 S Walnut Street	Wooster OH 44691	509(a)(1)	2013/2014 Annual Campaign	103
United Way Services of Geauga County	209 Center Street	Chardon OH 44024	509(a)(1)	2013/2014 Annual Campaign	130
University Circle Inc	10831 Magnolia Drive	Cleveland OH 44106	509(a)(2)	Future Connections longitudinal study	8,500
University of Pittsburgh	Thackeray Hall	Pittsburgh PA 15620	School	WAA Scholarship Robert Dumont	1,500
Viola Startzman Clinic	1874 Cleveland Rd	Wooster OH 44691	509(a)(1)	General Donation	270
Wadsworth Public Library Foundation	132 Broad St	Wadsworth OH 44281	509(a)(1)	General Donation	400
Wheaton College	501 College Avenue	Wheaton IL 60187	School	WAA Scholarship William Reeves	1,500
Women's Network	P O Box 13259	Akron OH 44334	509(a)(1)	General Donation	500
Wounded Warriors in Action Foundation	6518 Dolphin Cove Drive	Apollo Beach FL 33572	509(a)(1)	General Donation	500
Youth Opportunities Unlimited	1361 Euclid Avenue	Cleveland OH 44115	509(a)(1)	Jobs Unlimited Mentoring Program	15,000
Total Paid During the Year					1,113,721

Part B Approved for Future Payment

Organization	Address	City/State/Zip	Foundation Status of Recipient	Reason for donation (990-PF)	Donation
Fund for Our Economic Future	1360 East 9th Street, Suite 210	Cleveland OH 44114		Support the Fund for Our Economic Future of Northeast Ohio	34,000
Kent State University Foundation	1061 Fraternity Circle P O Box 5190	Kent OH 44240		Support of the Bachelor of Science in Insurance Studies Program	350,000
OhioHealth Foundation	180 East Broad Street 31st Floor	Columbus OH 43215		Support the Grant Medical Center Trauma Program	56,250
Playhouse Square Foundation	1501 Euclid Avenue Suite 200	Cleveland OH 44115		Support the Idea Center Studio	300,000
					740,250



VOLUNTEER GRANT PROGRAM

Recognizing employees and the organizations they care about most

Will you volunteer for 25 or more hours this year?

In 2014, **44** Westfield employees did.
They volunteered a total of **3,508** 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 30 days of turning in their application. 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. Applications are accepted year-round.

Option 1: hard copy application

Available on page 3 of this document

Option 2: online application (both portions must be completed)

Employee application

Nonprofit application

Questions?

Contact Rob Koszkalda,
community investment manager
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: 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 manager, 430-8920 or robertkoszkalda@westfieldgrp.com to ensure receipt of both applications.