

Scott County Community Foundation ANNUAL REPORT

2020



MESSAGE FROM THE BOARD CHAIR AND EXECUTIVE DIRECTOR



re-sil-ience: the capacity to recover quickly from difficulties; toughness

Dear Friends of the Foundation,

2020 was a year that none of us will ever forget. The COVID-19 pandemic turned everything upside down for our world. But while we endured challenges and tragedies, we feel it is important to focus on our blessings and how resilient our community is!

Things looked much different last year for the Community Foundation and our constituents. High school scholarship ceremonies were canceled, so we brought yard signs to recipients to celebrate their achievements. Our annual fundraising event was postponed, and eventually canceled - so we moved to an online auction format that many others had to do as well. We were in the middle of our Community Needs Assessment when everything came to a halt. Zoom meetings became the norm for many of us, and when we did meet in person, we were masked up.

Even with a fear about the uncertainty of the future, donors stepped up and supported their favorite causes. We re-activated our Disaster Relief Fund, and donors from advised funds quickly responded to immediate needs in our community. Our Youth Grantmaking Council adjusted their usual group service projects to allow youth to continue serving the community in any way they could - from mowing elderly neighbors' yards, to writing encouraging chalk messages to healthcare workers, to helping distribute food to those in need and much,

much more!

It was very common to hear stories about people anonymously dropping off gifts and lunch to strangers and friends to brighten their days. While it was very difficult to not see loved ones in the hospital or at nursing homes, people found ways to connect through notes, window visits, video chats and more. Because of the social distancing required, many people rediscovered our great outdoors and the many health benefits it offers. Families enjoyed a slower pace of life as activities were canceled.

Throughout this report you'll see faces of resiliency and our community coming together to serve others. You will read how grants, scholarships, and other programs have enabled our community to adapt and thrive in these challenging times. Part of being resilient means to embrace change and be optimistic. Things don't look the same as they did just one short year ago, but we want to celebrate the good that is happening in our community. We are thankful to you for your generosity and support, and we look forward to a return to normalcy this year!

Christa West
Board Chair

Jaime Toppe
Executive Director

TYPES OF FUNDS

We can help you choose a fund that will achieve your charitable goals.

Agency/Designated

These funds are for a school, government agency, church, or nonprofit. This allows the organization to receive annual grants as a dependable source of funding.

Field of Interest

These funds allow you to support a certain field, such as the arts, education, health care, etc. Or, you can support a specific geographic area. The Foundation's grants committee will handle the grant process for the area you have identified.

Donor Advised

These funds allow a donor to be involved in the giving. Perhaps you want to get your family involved and continue a legacy of giving. Each year you can recommend which charitable organizations or purposes to support.

Unrestricted

If you wish to provide resources to the community to meet current and future needs, this is the fund for you. You place no restrictions on this type of fund, entrusting the Foundation's grants committee and Board of Directors to choose quality and meaningful grants.

Scholarship

These funds assist students with educational expenses. You may customize your preference for a certain field of study or other criteria, and you can choose to be involved in the selection committee.

Pass-Through

This fund type is like a charitable checking account. Funds are not invested in the market.

Lasting Legacy

We honor those who have made a lasting commitment to our community by contributing charitable gifts to the Foundation through their will, trust, or other planned gifts.

Legacy Society Members

Dr. Walter Bridgewater
Kenneth G. Burton and
Nancy A. Barr
Robin Eve
Jane Ann Everitt
Terry Fewell
Joyce Hamilton
Cloyd and Betty Julian
Matthew LaMaster

L.L. and Juanita Lowry
Martha McNeely
Mary Elizabeth & Virgil S. Miller
Butch and Paula Murray
Al and Lonna Riggle
Jaime Toppe
Sarah "Sally" Waldkoetter
William Frasier Wetzel

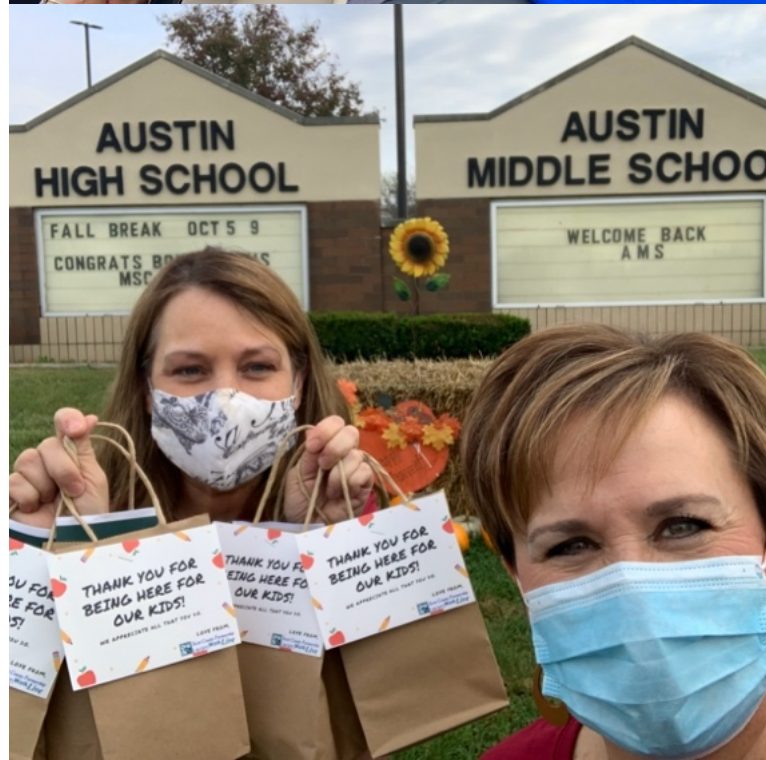


CURRENT FUNDS

All donors who gave between October 1, 2019 through September 30, 2020, are acknowledged on our website. Donors may choose to remain anonymous upon request.

Addie Mae Graham Memorial Fund
AHS Alumni Educational Fund
Alice and Gerald Miner Memorial Scholarship Fund
Austin Beautification Endowment Fund
Austin High School Academic Team Fund
Barbara Everett Community Fund
Borden Family Community Granting Fund
Boswell Family Fund
Carol L. Pettit Scholarship Fund
Carter-Waldkoetter Nursing Scholarship Fund
CASA of Scott County Endowment Fund
Charles G. and Lois D. Nolan Memorial Scholarship Fund
Chief John Memorial Campership Fund
Christie Crafton Memorial Scholarship Fund
Clark Chapel Cemetery Fund
Community Enrichment Fund
Cree-ating Community Fund
Dale McNeely Memorial Scholarship Fund
Dale and Rosemarie Hobbs Fund
Dan and Mary Lou Slattery Fund
Dr. William and Diann Scott Memorial Donor Advised Fund
Dr. William and Diann Scott Memorial Fund
Dobbins Family Fund
Dolly Parton Imagination Library Fund
Donald R. Collins Sr. Family Fund
Dottie Shelhamer Memorial Fund
Dustin and Derek Jones Memorial Fund

Ed McGuire Memorial Fund
Ella Maude McCulloch Mission Endowment
Epply-Shields Memorial Scholarship Fund
First Christian Church Senior Citizens Fund
First Christian Church Youth Fund
The Garten Foundation
Gladys A. Berna Education Fund
Greater Scott County Chamber of Commerce Educational Fund
Hazel Gillespie Hunger Fund
Hazel and Lowell Lowry Sr. Memorial Fund
Jayce Ray Stallings Memorial Fund
John and Janice Martin Unrestricted Fund
Joyce Hamilton Historical Preservation Endowment Fund
Joyce Lowry Broady Memorial Endowment
Kathy Nicholson Mission Endowment Fund
Kathy Nicholson Music Endowment Fund
Kelley Robbins Endowment Fund for Public Health
Kenneth Roseberry Memorial Fund
Kenninger Music Education Fund
Kimberlin Creek Baptist Church Cemetery Fund
Laurence and Myrtle Bridge Memorial Fund
Lauren Graham Memorial Fund
Lauren Graham Memorial Breast Cancer Fund
Lauren Graham Memorial Tennis Fund
Lilly Scholar Endowment Fund
L.L. and Juanita Lowry Unrestricted Fund



Martin Christian Education Fund
Mary Elizabeth & Virgil S. Miller Memorial
Scholarship Fund
Morgan Family Endowment Fund
Nathan and Alice Bridge Memorial
Endowment Fund
Neighbors Helping Neighbors Fund
Nina Keown Memorial Fund
Norma Nowlin Memorial Fund
Phi Beta Psi Sorority, Theta Alpha Chapter
Forever Tree Fund
Philip Glenn Martin Memorial Fund
Phyllis Calvin Educational Endowment Fund
Pilot Club Lifeline/Mary Allen and Jan
Thompson Healthcare Scholarship Fund
Robert G. Comer Memorial Scholarship Fund
Robert and Margie Fawver Fund
Robin Eve Memorial Fund
Rosalind English Trust
Scott County 4-H Fund
Scott County CAPE Endowment Fund
Scott County Community Foundation Building
Fund
Scott County Community Foundation
Cornerstone Fund
Scott County Community Foundation
Operating Endowment Fund
Scott County Economic Development
Corporation Fund
Scott County Family YMCA Endowment Fund
Scott County Genealogical Society Inc. Fund
Scott County Heritage Center and Museum
Fund
Scott County Hunger Fund
Scott County Immediate Response Fund

Scott County Kids First Fund
Scott County Literacy Council Fund
Scott County Memorial Fund
Scott County Partnership Forever Tree Society
Fund
Scott County Soil and Water Conservation
District Fund
Scott County Youth Grantmaking Council Fund
Scott Memorial Hospital Indiana University
Southeast Scholarship Fund
Scott Memorial Hospital Ivy Tech Scholarship
Fund
Scott Memorial Hospital Guild
Brunton-Mumford Memorial Scholarship
Scottsburg Beautification Committee Fund
Scottsburg Kiwanis Club Fund
Scottsburg Lions Club/D.Q. Reid Memorial
Fund
Scottsburg United Methodist Church
Endowment Fund
Scottsburg United Methodist Church General
Endowment Fund
Shelley Comer Akers Memorial Scholarship
Fund
SHS Alumni Association Education Fund
Terry Fewell Memorial Unrestricted Fund
Terry Fewell Memorial Youth Fund
Timothy Michael Wolf Memorial Scholarship
Fund
United Way of Scott County Operating
Endowment Fund
Walter S. and Clarice (White) Bridgewater
Memorial Scholarship Fund
Wesbanco Fund
West Family Community Fund
William Frasier Wetzel Memorial Fund

Wolf Family Charitable Fund
Yellow Rose of Nancy R. Laird Memorial Fund

Memorials and Honorariums

IN MEMORY

Donnie Abbott
Evan Allen
Nathan and Alice Bridge
Maud Roy Gray
Derek Jones
Mildred Mumford
Lisa Noble
Dorothy Rice
Kelley Robbins
Cecil and Bobbi Smith
Luther and Martha Watts

IN HONOR

Macy Funk
Joe and Chris Robbins
Jan Thompson
Melissa Woods' birthday

Individuals, families, organizations, and companies can create a fund that can be customized to achieve charitable goals.

There are many ways to give, and while cash is the most popular method, other creative ways include gifts of stock, IRA rollover, bequest through will or trust, beneficiary designation through life insurance or retirement plan, charitable remainder trust, gifts of real estate, grain, and livestock. Contact us for details.

NEW FUNDS

In addition to the funds below, the Boswell Family Fund and William Frasier Wetzel Memorial Fund were both established this past year. As unrestricted funds, they will provide support during our Community Grants Program each year.



Yellow Rose of Nancy R. Laird Memorial Fund

The yellow rose stands for joy and happiness. It symbolizes sunshine and brightness in our lives. Yellow represents joy, peace, warmth, to cheer up someone, lifting spirits, friendship and caring. "The yellow rose is a perfect description of Mrs. Nancy Laird, who was a loving and caring person," shared Scottsburg resident Hank Jentzen.

Due to the close relationship Hank had with her and her family, he and her son Scott have established an unrestricted fund in her memory.

"Looking back to my younger days in New Jersey, Mr. and Mrs. Laird always welcomed me into their home," said Hank. "I felt the love and warmth of their kind spirit. They were wonderful people and Mrs. Laird created a caring home for many young adults who were friends of their children."

"This past December, Mrs. Laird called me and told me she always thought of me as one of her sons," shared Hank. "We reminisced about the old days and had a few laughs. That was the last time I talked to her. She passed away just before Christmas of 2019."

Having been a longtime grants committee and board member for the Community Foundation, Hank was familiar with the far-reaching impact made in the community through unrestricted funds.

"Over the years I have tried to give back to her for her kindness by hopefully making her final years a little more joyful. Now it only makes sense to create an unrestricted fund in her memory. The fund will ensure her kindness will live on forever, and help create a better community now and for generations to come," said Hank.

"My life has been made better for knowing Mr. and Mrs. Laird. Scott and I decided that an unrestricted fund was the best way to help others now and forever. This fund is our way to say thank you, and knowing her kindness and generosity will continue to help others in the community forever through the Scott County Community Foundation is a great feeling," said Hank.



Carter-Waldkoetter Nurse Scholarship Fund

Sarah Waldkoetter, better known as Sally to her family and friends, graduated from Scottsburg High School in 1955. She continued her schooling, eventually becoming a doctoral candidate in nursing. She worked at a few hospitals and became a professor at Columbia University and the University of Cincinnati.

Sally was an active member of the Trinity Lutheran Church in Vallonia, where she lived. She enjoyed "nursing" a Vallonia landmark back to health and led the restoration efforts of a local hotel that was built in 1914.

To show her appreciation for the education and guidance of the faculty of SHS, Sally directed in her estate plan that the Carter-Waldkoetter Nurse Scholarship Fund be established. It will provide assistance to graduating seniors who plan to major in nursing. Sally cared very much for her family and friends, and established this scholarship in memory of Ida Bell

Everitt Carter, James Levi Carter, and their descendants who have graduated from Scottsburg High School, as well as her parents, Harry John and Grace Mildred Carter Waldkoetter.

Sadly, Sally passed away in 2018. She donated her house to the Scott County Community Foundation, which we were able to sell in 2019 to provide the funding for the scholarship. The scholarship will be available for SHS seniors starting in 2022.

Sally was remembered by friends and family as a determined, dedicated, kind person who delighted in helping and giving. Her legacy will continue to live on through this scholarship fund.

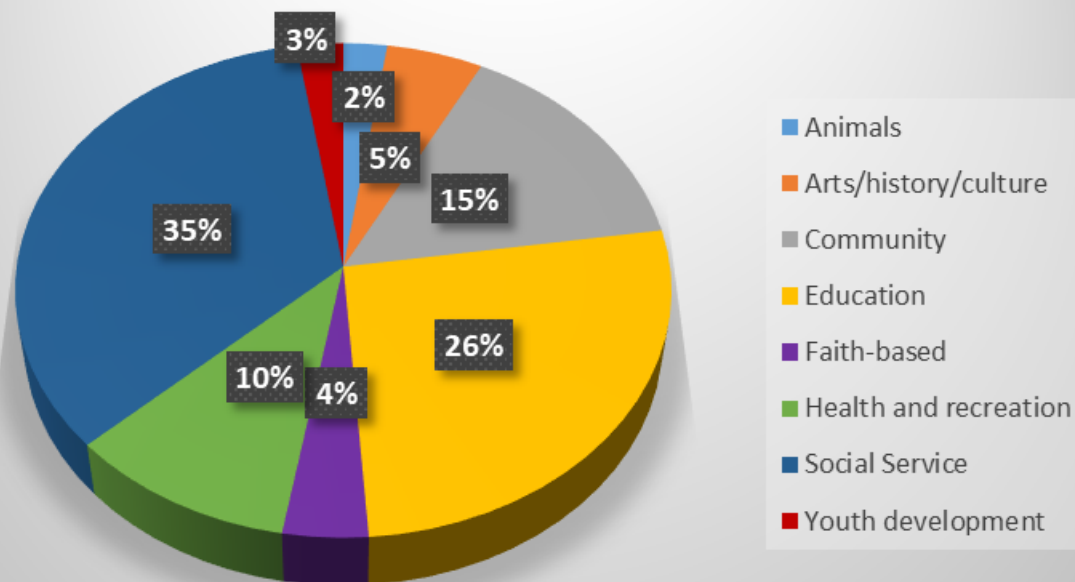
COMMUNITY GRANTS

Our endowment funds made it possible for \$239,387 to be awarded to the community. This does not include scholarships, which you can read about on the following page.



AHS Alumni Association * Align Southern Indiana * Austin High School * Bree's Blessings * CASA of Scott County * Child and Family Advocates * City of Scottsburg * EMPOWER of Scott County * Englishton Park * Gleaners Food Bank * Grace Christian Academy * Greater Scott County Chamber of Commerce * Happy Humming Alpacas 4-H Club * Humane Society of Scott County * Indianapolis Motor Speedway * Johnson Elementary School * Kimberlin Creek Baptist Church * LifeSmart Youth * Lifespan Resources * New Creation Ministries * Preservation Alliance Inc. * The Refuge for Children * Scott County Fair Association * Scott County Family YMCA * Scott County Community Clearinghouse * Scott County Partnership * Scott County Robotics * Scott County Sheriff's Department * Scott County Young Marines * Scott County Youth Football League * Scott Memorial Health * Scottsburg High School * SHS Theatre Boosters * Scottsburg Middle School * Scottsburg United Methodist Church * THRIVE Recovery Community Organization * United Methodist Committee on Relief * United Way of Scott County

Grants By Program Area



SCHOLARSHIPS

\$74,050 in educational assistance was awarded to graduating seniors and non-traditional adult learners.



2020 Lilly Scholar Lyndie Foster

Lilly Endowment Community Scholarship recipients receive 4-year scholarships for tuition plus \$900 for books and required expenses each year. Lyndie Foster, a graduate of Scottsburg High School, is attending the University of Evansville. The value of her scholarship is \$168,776. Lilly Endowment has awarded 39 scholarships to Scott County students through the Scott County Community Foundation since 1998.

Alice and Gerald Miner Memorial Scholarship: Jordyn Livesay, \$4,000

Carol Pettit Memorial Scholarship: Carson Cox, \$500

Charles G. and Lois D. Nolan Memorial Scholarship: Andrew Slaton, \$750

Christie Crafton Memorial Scholarship: Ally Justice, \$500

Dale McNeely Memorial Scholarship: Abby Colson, \$11,000; Elle Fleenor, \$10,000; Andrew Foster, \$9,000

Epply-Shields Memorial Scholarship: Hannah Brown, \$5,000

Lilly Scholar Endowment Fund: Abby Colson, \$500; Kansas Amos, \$500

Mary Elizabeth & Virgil S. Miller Memorial Scholarship: Jordan Robinson, \$2,400; Ally Justice, \$2,400

Pilot Club Lifeline/Mary Allen & Jan Thompson Healthcare Scholarship: Benjamin Everett, \$1,500

Scott Memorial Hospital Guild Brunton-Mumford Memorial Scholarship: Luke Watts, \$5,000; Sadie Fugate, \$5,000

Shelley Comer Akers Memorial Scholarship: Elle Fleenor, \$500

Timothy Michael Wolf Memorial Scholarship: Jaiden Herald, \$5,000; Michelle Shelton, \$2,000

Walter S. and Clarice (White) Bridgewater Memorial Scholarship: Lauren Jeffries, \$500

William Frasier Wetzel Memorial Scholarship: Macy Funk, \$4,000; Zachary Stidham, \$4,000



"What a wild ride my first semester has been! I knew it would be an interesting transition moving into college in the middle of a pandemic but found that my professors and classmates are supportive of me and my goals. Currently, I am pursuing a degree in Athletic Training and a minor in Chemistry with intentions to enroll in medical school.

While I was moving to Evansville, staying safe and healthy was my priority, but I was nervous that social distancing requirements would make it difficult to meet friends and get settled into classes. Luckily, this was even easier than I thought! All of my classes were challenging and pushed me to become an even better student. I've met most of my friends from class and the new clubs I'm in. I am a class representative for the Athletic Training Club, a new member of the American Medical Women's Association, and an initiate of the Chi Omega Fraternity.

I am so excited to see how the spring semester unfolds and am looking forward to finding more opportunities to improve my skills as a student and an active member of my new college community."

SCOTT COUNTY YGC

Mission: Improving the lives of children of Scott County by providing them a voice through philanthropy

Ninety-six youth in grades 5-12 learned about giving their time, talent, and treasure back to the community last year. Some of their accomplishments included:

- Awarded \$7,033 to 12 organizations for youth-related projects/programs;
- Visited grant recipients to see firsthand the impact of their grantmaking;
- Participated in 18 community service projects. COVID-19 resulted in the cancellation of many events this year, but the YGC adapted by adding the Clean Earth Challenge and COVID-19 Community Love projects to allow them to serve the community on their own instead of our usual large group events;
- Hosted their 5th Annual Austin vs. Scottsburg Thanksgiving Throwback Throwdown alumni game fundraiser in November 2019, raising \$3,700;
- Learned leadership skills through officer and chairperson positions, grant decision-making, community presentations, and interviews for new and current members.



EARLY CHILDHOOD EDUCATION

Investing in early childhood education is a cause we care about very much. Statistics show that less than half of children between birth and age five years are read to every day by their parents or other family members. Many children are arriving at kindergarten without the skills necessary for lifetime learning. Children who are read to regularly display greater language comprehension, larger vocabularies, and higher cognitive skills.

Eight years ago we partnered with United Way of Scott County to bring the Dolly Parton Imagination Library program to our county. Over 69,000 free age-appropriate books have been mailed directly to children's homes each month, helping to meet our goal of increasing literacy. By the end of 2020, there were 941 children registered for the program, plus over 1,360 kids who "graduated" from the program when they turned five. Through donations from individuals, businesses and civic organizations, as well as grants, community support has helped to ensure this program can continue.

Our Early Childhood Committee was able to host one roundtable for early childhood providers before the COVID-19 pandemic. We also partner with neighboring counties to address kindergarten readiness through the Align Southern Indiana KR A-Team.



Big sister Reece enjoys reading to Caroline, age 1.

COMMUNITY LEADERSHIP



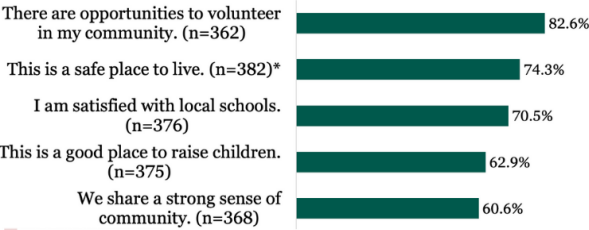
Lilly Endowment GIFT VII Grants

In late 2018, Lilly Endowment Inc. (LEI) announced their seventh phase of the Giving Indiana Funds for Tomorrow (GIFT) initiative. There were several components within this initiative, including a matching grant incentive to build endowment funds. We are pleased to share that in August 2020, we met our goal early through the generosity of over 225 donors. Nine new funds were established during this matching grant period, and the funds will significantly increase our grants and scholarships to the community.

In 2019, we received a \$50,000 community leadership planning grant. This was primarily used to conduct a Community Needs Assessment, which was finished in early fall of 2020. The full report and issue briefs can be downloaded from our website, or a copy can be picked up in our office.

TOP 5 QUALITY OF LIFE ASSETS

in Scott County, IN.



(percent of respondents that agree or strongly agree)

APPLIED RESEARCH AND EDUCATION CENTER
INDIANA UNIVERSITY SOUTHEAST



We then received a community leadership implementation grant from LEI for \$75,000 to carry out strategies and activities identified during the planning grant. We are using the findings from the Community Needs Assessment to create a community development plan in 2021. As part of the implementation grant, we provided financial support for early childhood education at Scott County School Districts 1 and 2. We also identified a need for leadership development. We partnered with Leadership Southern Indiana to expand Scott County to its service area. They offer several leadership programs that Scott County residents can participate in, and "Scott County Day" has been added to their DISCOVER community-based program.



COMMUNITY FOUNDATION TEAM

2019-2020 Board of Directors

Christa West, Chairman
Heather White, Vice Chair
Daniel Brunner, Treasurer
Melissa Woods, Secretary
Nancy Barr

Sheila Carter
Steve Gwaltney
Kevin Jentzen
Jami Parks
Chris Routt

Staff

Jaime Toppe, Executive Director
Charlotte Boswell, Financial Officer

Interns

Amy Cowles
Brennyn Pollert



AUDITED FINANCIALS

*Statements of Financial Position
September 30, 2020 and 2019*

ASSETS

	2020	2019
Cash and cash equivalents	\$ 164,598	\$ 278,212
Certificate of deposit	52,300	51,521
Investments	9,052,514	8,531,182
Real estate held for sale	-0-	164,555
Property and equipment, net	106,850	110,879
	<u>\$ 9,376,262</u>	<u>\$ 9,136,349</u>

LIABILITIES AND NET ASSETS

Liabilities

Accounts payable and accrued expenses	\$ 2,850	\$ 2,664
Deferred revenue	3,590	117,573
Custodial funds	393,969	401,204
Liability related to real estate held for sale	-0-	81,042
Total liabilities	400,409	602,483

Net assets

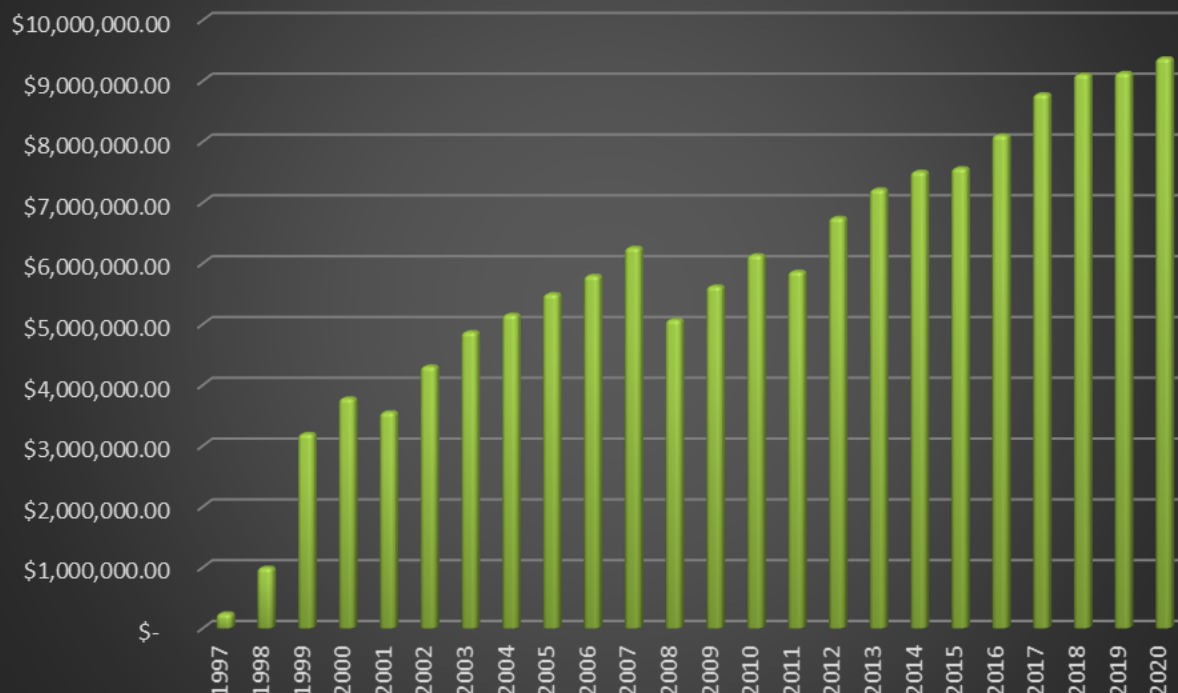
Without donor restrictions:		
Operating	172,375	168,214
Operating reserve	140,551	124,512
Board designated:		
Administrative	466,775	495,780
Granting	94,190	-0-
	<u>873,891</u>	<u>788,506</u>

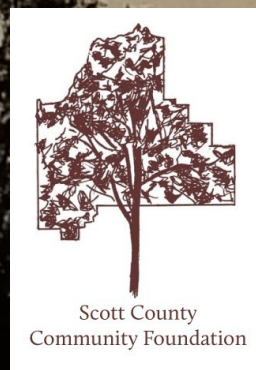
With donor restrictions:

Restricted for specified purposes	21,810	43,171
Restricted in perpetuity - endowment	7,548,510	7,012,569
Restricted subject to the Foundation's spending policy	531,642	689,620
	<u>8,101,962</u>	<u>7,745,360</u>

Total net assets	<u>8,975,853</u>	<u>8,533,866</u>
	<u>\$ 9,376,262</u>	<u>\$ 9,136,349</u>

Foundation Assets





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Looking Forward, Giving Back

Photos in this annual report are courtesy of Heather White, Sharon Parker, Beth Robison, Austin High School, Scott County Partnership, Marty Randall, Beth Keith, and Scott County Health Department.