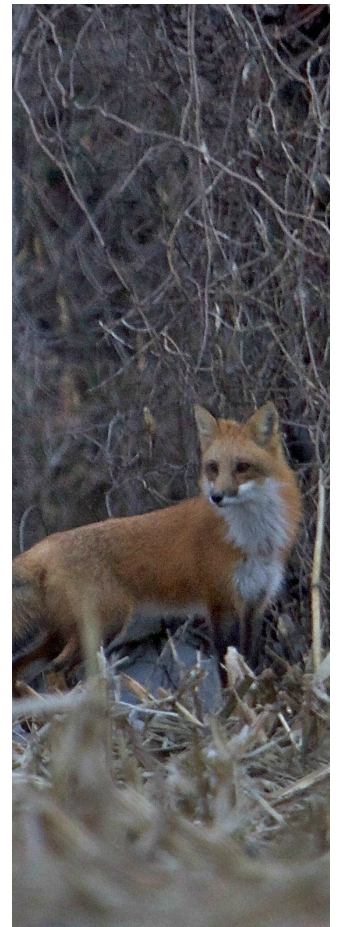
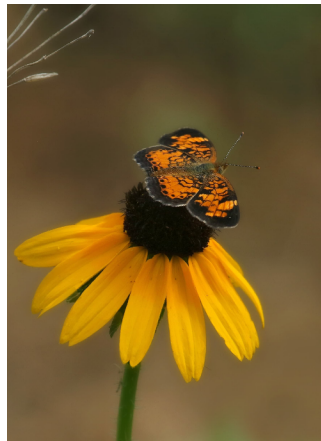


Scott County Community Foundation 2019 ANNUAL REPORT





Message from the Chairman



DEAR FRIENDS OF THE FOUNDATION,

On behalf of the Scott County Community Foundation Board of Directors, thank you for your support of the Foundation last year. Because of your generosity, we are on track to take full advantage of the current Giving Indiana Funds for Tomorrow (GIFT VII) matching funds initiative through Lilly Endowment Inc.! Any unrestricted funds raised through December 31, 2020 will be matched \$2 for \$1 by LEI. Building our unrestricted endowments will allow the Foundation to continue awarding grants to worthwhile non-profit organizations serving Scott County.

In addition to the matching fund opportunity, GIFT VII rolled out a new and unique initiative called Community Leadership Grants. These grants are designed to help the Foundation collaborate with local leaders to address high priority challenges and opportunities in Scott County. Since one of the purposes of the grant is to collaborate with local leaders, a committee of elected officials and leaders was formed to assist in applying for the different phases of this grant opportunity. The first phase was for a planning grant and we are incredibly

proud that with the help of the committee, the Foundation's grant application was fully funded for \$50,000. A large portion of the grant funds will be used to complete a Community Needs Assessment. The results and recommendations from that assessment will be critical for the next phase of Community Leadership Grants, which is an implementation grant. Our plans are to create a Scott County Vision Plan that identifies the direction of the community's future.

We are thrilled that GIFT VII enables us to unite and partner with community leaders and officials to help Scott County develop a plan for overcoming challenges while exploring opportunities for growth and positive change. Exciting things are on the horizon for 2020—stay tuned!

As always, thank you for helping the Foundation fulfill its mission of growing and preserving charitable gifts to strengthen Scott County by looking forward and giving back.

Christa West
Chairman

Scott County Community Foundation meets national standards for operational quality, donor service and accountability in the community foundation sector. The National Standards Seal by our name indicates official confirmation from the Council on Foundations that we have met the most rigorous standards in philanthropy. It affirms our commitment to financial security,

transparency, and accountability. Grantmaking includes an open, competitive process designed to address the changing needs of our community. The National Standards Seal also confirms our history of honoring donors' wishes - to support historical preservation, cultivate gardens, help the needy, educate our citizens - and support countless other causes.



Excellence. Accountability. Impact.™

Photos throughout this annual report are courtesy of Brian Lowry, and feature scenes from Scott County.

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.

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.

FIELD OF INTEREST

These funds allow you to support a certain field, such as the arts, education, healthcare, 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.

SCHOLARSHIP

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

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.

PASS-THROUGH

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

Types of Funds

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



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
Terry Fewell
Joyce Hamilton
Clloyd 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

"What we have done for ourselves alone dies with us; what we have done for others and the world remains and is immortal."

Albert Camus, philosopher

Current Funds



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
 Carol L. Pettit 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

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 Fund
 Epply-Shields Memorial Scholarship
 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 Endowment Fund
 Joyce Hamilton Historical Preservation Endowment Fund
 Joyce Lowry Broady Memorial Endowment Fund
 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 Educational 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 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
 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
 Wolf Family Charitable Fund

Memorials and Honorariums

IN MEMORY

Mary Baringer
 Nathan and Alice Bridge
 Joyce Broady
 Leo Curtsinger
 Wilma Curtsinger
 Terry Fewell
 Maud Roy Gray
 Derek Jones
 Elizabeth Jones
 Rose Moore and Descendents
 Kelley Robbins
 Billy Guy Robison
 Annalee Turley
 Kathy Jones Wajerski, SHS Class of 1971
 Luther and Martha Watts
 Tim Wolf

IN HONOR

Cody Smith's birthday
 Pat Larr

All donors to the Community Foundation between October 1, 2018 through September 30, 2019, are acknowledged on our website. Donors may choose to remain anonymous upon request.



At the end of our 2019 fiscal year, we had 95 endowment funds and six funds growing to reach their goal of becoming an endowment.

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

CASA OF SCOTT COUNTY



Court Appointed Special Advocates (CASA) is a nonprofit that recruits, screens, and trains volunteer child advocates to work in the court system in collaboration with other key agencies, legal counsel, and community resources to represent the best interest of children in juvenile court proceedings. Scott County Judge Roger Duvall was instrumental in getting the program started locally in 2007.

CASA has made great strides to increase the served number of abused and/or neglected children who were waiting for a CASA to be their voice in court. With the help of federal, state, and local grants, as well as donations, they have increased the number of staff and decreased the wait list.

"Unfortunately, grants fluctuate and we cannot always depend on the same amounts coming from them each year," said Executive Director Kelly Shelhamer. "This is the main reason we started our endowment fund. We chose the Community Foundation because of their years of support they have provided to the program."

It only takes one person to change a child's life forever. By donating to the CASA of Scott County

Endowment Fund, you are helping them to continue serving the children of Scott County.

JOYCE LOWRY BROADY MEMORIAL FUND



Joyce Broady was the fifth of 11 children and it was fitting that she was a middle child because she was nearly always in the middle of all the excitement that went on in such a large family. Many stories have been told about her spunk, her fighting spirit, and her deep love of family in spite of sibling spouts. On their family farm, Joyce learned responsibility, sacrificial love, and loyalty to family.

Joyce and her husband Steve had two children, Stacey Turner and Craig Broady; and are grandparents of Logan and Landon Campbell, and Alli McCarty.

Early in Joyce's life as a parent, she was diagnosed with breast cancer. In spite of many years dealing with cancer, treatment, remission, recurrence, experimental treatments, positive results and never-ending uncertainty, her steadfast faith, unfettered joy and the long-held desire to miss nothing sustained her through longer trials than most will ever know.

Because her desire and ability to help cancer patients was so broad, her family decided to establish an endowment in her memory. Oftentimes there are expenses not covered by insurance that put an additional burden on families, and this fund will help to alleviate some of those struggles.

THE GARTEN FOUNDATION



Chris and Beth Garten grew up in Scottsburg, both having graduated from SHS. As small business owners of Signature Countertops, and parents to Hayden, Hudson, and Greyson, they lead busy lives. But giving back to the community has always been part of who they are. Chris has a heart of service for his community and his country. In addition to being a Marine Corps Gunnery Sergeant, who has served two tours in Iraq, he also serves as an Indiana State Senator, representing Senate District 45. Chris has served as Vice President for the Scott County Chamber of Commerce for almost five years. Beth, a busy mom to three boys, is constantly volunteering for many community activities and is engaged in countless school organizations. Hayden and Hudson are members of the Community Foundation's Youth Grantmaking Council.

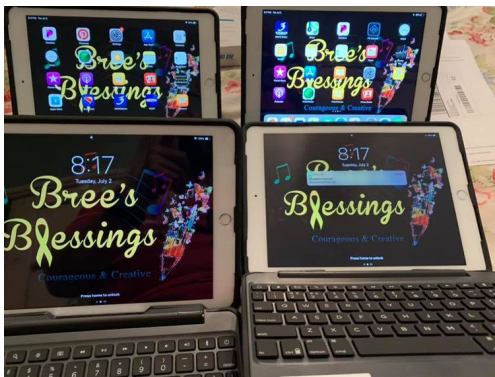
When they heard about the Lilly Endowment matching grant opportunity for unrestricted funds, it made sense to establish a permanent fund to benefit the community, thus, The Garten Foundation was born. Now, each year grants will be awarded to carry on their family's spirit of giving back.

"Growing up in a broken home, I truly understand the value of non-profits in our community and investing in our children and our people is the most valuable investment we can make; this fund allows us the opportunity to do just that," stated Chris. "Beth and I believe in Scott County to our core and we couldn't be more excited about helping in this capacity."

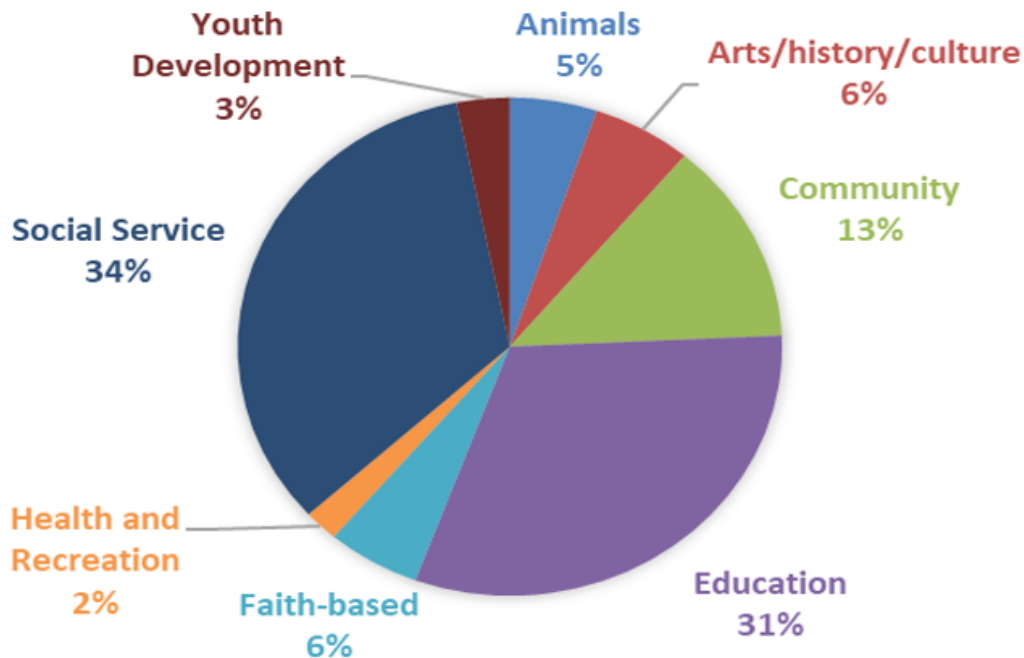
AHS Alumni Association * Align Southern Indiana * Austin High School * Bree's Blessings * CASA of Scott County * Child and Family Advocates * Community Action of Southern Indiana * Cradle Pregnancy Resource * Englishton Park * First United Methodist Church of Okeechobee * Gleaners Food Bank * Humane Society of Scott County * Kimberlin Creek Baptist Church * Lexington Good Faith Preschool * LifeSmart Youth * Lifespan Resources * New Creation Ministries * Preservation Alliance Inc. * Scott County Clearinghouse * Scott County 4-H * Scott County Fair Association * Scott County Heritage Center and Museum * Scott County Partnership * Scott County School District 1 * Scott County School District 2 * Scott County Sheriff's Department * Scott County Youth Grantmaking Council * Scottsburg United Methodist Church * Susan G. Komen For the Cure * United Way of Scott County * Wonder Valley * Young Marines

Community Grants

Our endowment funds made it possible for \$215,445.18 to be awarded to the community. This does not include scholarships or grants from the YGC, which you can read about on the following pages.



GRANTS BY PROGRAM AREA



Scholarships

\$75,100 in educational assistance was awarded to graduating seniors and non-traditional adult learners.



Alice and Gerald Miner Memorial Scholarship: Olivia Reul, \$4,000

Charles G. and Lois D. Nolan Memorial Scholarship: Olivia Miner, \$500

Christie Crafton Memorial Scholarship: Isabelle Duckwall, \$500

Dale McNeely Memorial Scholarship: Eliza Mount, \$11,000; Emma Christoff, \$10,000; Macy Colson, \$9,000

Epply-Shields Memorial Scholarship: Abigail Banet, \$2,250; Isabelle Duckwall, \$2,250

Lilly Scholar Endowment Fund: Erika

Lee, \$500; Eliza Mount, \$500

Mary Elizabeth & Virgil S. Miller Memorial Scholarship: Erika Lee, \$2,300; Lindsey Pfaffenbach, \$2,300

Phyllis Calvin Educational Endowment: Joseph Smith, \$1,000

Pilot Club Lifeline/Mary Allen and Jan Thompson Healthcare Scholarship: Shelly Campbell, \$1,500

Robert Comer Memorial Scholarship: Erika Lee, \$500

Scott Memorial Hospital Guild Brunton-Mumford Memorial Scholarship: Amber Marshall, \$5,000; Abigail Johanningsmeier, \$5,000

Scott Memorial Hospital Ivy Tech Scholarship: Julia Anderson, Madelyn Evans, Stephanie Evans, Zach Zeller, \$1,000 each

Scott Memorial Hospital IUS Scholarship: Ashton Bowles, Adrianna Caudill, \$3,500 each

Shelley Comer Akers Memorial Scholarship: Lindsey Pfaffenbach, \$500

Timothy Michael Wolf Memorial Scholarship: Patrick Lincoln, \$5,000

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



2019 Lilly Scholar Madelyn Shelton

Lilly Endowment Community Scholarship recipients receive 4-year scholarships for tuition plus \$900 for books and required expenses. Madelyn Shelton, a graduate of Scottsburg High School, is attending Hanover College. The value of her scholarship is \$150,680. Lilly Endowment has awarded 38 scholarships through the Scott County Community Foundation since 1998.

"Being a Lilly Scholar is an honor and a blessing that has changed the trajectory of my life. Ambitions that were once unthinkable are now in reach because of the doors that the Lilly Endowment has opened. My experiences at Hanover College this semester have allowed me to grow exponentially as a student and as an individual. I am pursuing a double major in history and secondary education. My classes have been challenging, but they have confirmed my career choice and my passion for the subject of history. This semester I was selected for the Board of Editors for the *Hanover Historical Review*. The *HHR* is an academic journal published by Hanover College comprised of student pieces on a variety of historical topics. Being a part of the editing process has not only improved my skills as a writer but has inspired me to be published before I graduate. Academically, I am flourishing. I have personal relationships with my professors and I am invested in gaining everything I can from them. It was their support and excellent instruction that helped me earn a place on the Dean's list this semester. I am excited for what the future holds, including summer internship study abroad opportunities that I am beginning to research."



Scott County YGC

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

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

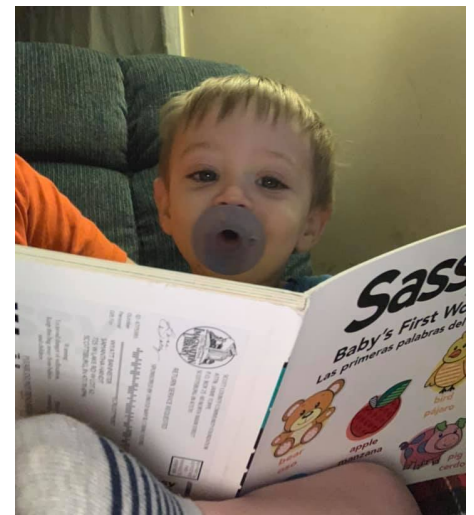
- ▶ Awarded \$7,339 to nine organizations for youth-related projects/programs
- ▶ Visited grant recipients to see firsthand the impact of their grantmaking
- ▶ Presented the 6th Annual Helping Hand Award to Marley Fleenor for her work with Marley's Mendings
- ▶ Participated in 23 community service projects
- ▶ Hosted 4th annual Austin vs. Scottsburg Thanksgiving Throwback Throwdown alumni basketball game fundraiser, raising \$3,779
- ▶ Learned leadership skills through officer and chairperson positions, grant decision-making, and interviews for new and current members
- ▶ Enjoyed team-building through paintball and an afternoon on the lake at Country Lake Christian Retreat

Early Childhood Education

Investing in early childhood education is a cause we care very much about. Seven years ago we partnered with United Way of Scott County to bring the Dolly Parton Imagination Library program to our

county. Over 58,000 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 2019, there were 876 children registered for the program, plus over 1,100 kids who "graduated" from the program when they turned five. Through donations from individuals, business and civic organizations, as well as grants, community support has helped to ensure this program can continue.

Our Early Childhood Committee also hosted roundtables for early childhood providers and family literacy/resource fair events. We partner with neighboring counties to address kindergarten readiness.



Wyatt, age 15 months, loves his books! His mom shared that he makes the noises the animals makes and gets so excited!

Community Leadership



Lilly Endowment Community Leadership Planning Grant

Last summer, we were notified by Lilly Endowment, Inc. that we were the recipient of a \$50,000 planning grant, with the goal of exploring how we can effectively play a leadership role in our community.

We have contracted with the Applied Research and Education Center at Indiana University Southeast to conduct a community needs assessment. To the best of our knowledge, an assessment of this magnitude has not been done in 20 years.

Our goal is to identify and prioritize Scott County's needs and assets in several areas, including economic development, the aging population, education, income and poverty, substance abuse, health, mental health, infrastructure, recreation, and housing. The resulting study will provide a roadmap for community development in our county.

Education Matters Southern Indiana

Educational attainment in our region is well below national averages and is having an impact on our community, people, and businesses. In Southeast Indiana, only 25% of our workforce has an associate's, bachelor's or professional degree, compared to 38% nationally.

To address this issue, eight years ago we partnered with the community foundations in Clark, Floyd, Harrison, and Washington counties to create an initiative, Education Matters Southern Indiana. Our goal is to help adults who started, but never completed, some form of post-secondary education. Over the years we have partnered with multiple schools and organizations to reduce the barriers that adults face when trying to achieve their educational goals. Through the generosity of our donors, we provide scholarships as well as employ an adviser to assist students in this region.

Align Southern Indiana

Five years ago we joined a 5-county collaborative (Clark, Floyd, Harrison, Scott and Washington counties) to unify our region and transform our communities. Based on a national model, Align Southern Indiana was created and is now its own 501(c)(3) entity. Through community input from all sectors, five Foundational Areas of Focus were identified: Economic and Talent Development, Education, Regional Leadership, Quality of Life, and Quality of Place. Teams have been formed for each area, with long-term outcomes (for example, the Education team is focusing on kindergarten readiness). We've already seen many successes with the collaborative work being done in these five counties through strategies in each area. Because of this coordination, we are able to impact more people, avoid duplication and address gaps in services, resources, and funding.

Community Foundation Team



Board of Directors

Christa West, *Chairman*
Heather White, *Vice Chair*
Josh Stigdon, *Treasurer*
Melissa Woods, *Secretary*
Nancy Barr
Daniel Brunner
Sheila Carter
Mike Everett
Steve Gwaltney
Jami Parks
Denny Wilson

Staff

Jaime Toppe,
Executive Director

Charlotte Boswell,
Financial Officer

Interns

Amy Cowles
Jesse Mays
Sara McGannon

Audited Financials

Statements of Financial Position
September 30, 2019 and 2018



ASSETS

	<u>2019</u>	<u>2018</u> <u>AS RESTATED</u>
Cash and cash equivalents	\$ 278,212	\$ 112,475
Certificate of deposit	51,521	50,755
Investments	8,531,182	8,831,366
Real estate held for sale	164,555	-0-
Property and equipment, net	<u>110,879</u>	<u>115,811</u>
	\$ 9,136,349	\$ 9,110,407

LIABILITIES AND NET ASSETS

Liabilities

Accounts payable and accrued expenses	\$ 2,664	\$ 2,655
Deferred revenue	117,573	-0-
Custodial funds	401,204	420,353
Liability related to real estate held for sale	<u>81,042</u>	<u>-0-</u>
Total liabilities	602,483	423,008

Net assets

Without donor restrictions:

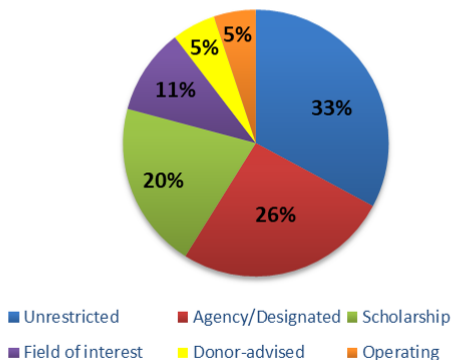
Operating	168,214	180,966
Operating reserve	124,512	112,865
Board designated	<u>495,780</u>	<u>542,275</u>
	788,506	836,106

With donor restrictions:

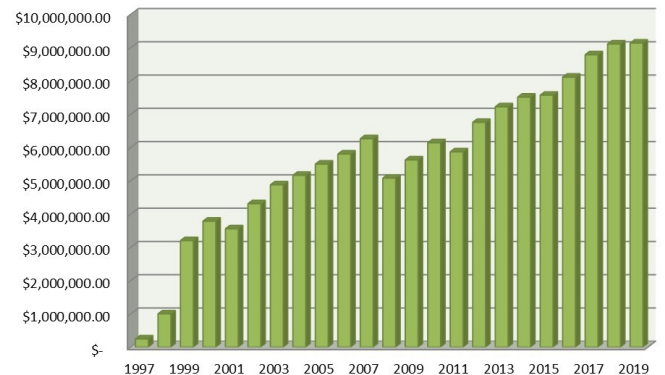
Restricted for specified purposes	43,171	11,528
Restricted in perpetuity - endowment	7,012,569	6,733,115
Restricted subject to the Foundation's spending policy	<u>689,620</u>	<u>1,106,650</u>
	<u>7,745,360</u>	<u>7,851,293</u>
Total net assets	<u>8,533,866</u>	<u>8,687,399</u>

\$ 9,136,349 **\$ 9,110,407**

Gifts to Fund Type



Foundation Assets



Looking Forward, Giving Back



Scott County
Community Foundation

P.O. Box 25
60 North Main Street
Scottsburg, Indiana 47170

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812.752.9257 fax
info@scottcountyfoundation.org
www.scottcountyfoundation.org