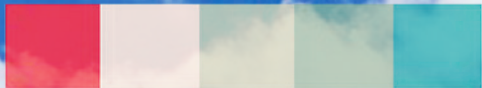
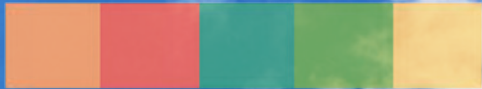


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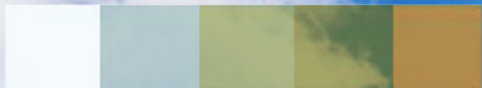


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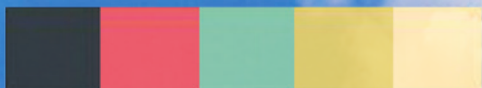


COMMUNITY  
FOUNDATION  
JEFFERSON COUNTY

2019 ANNUAL REPORT



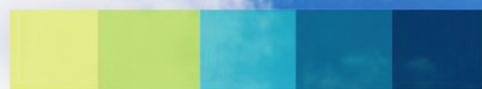
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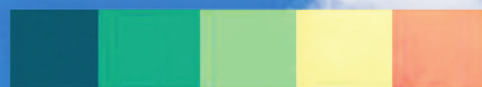
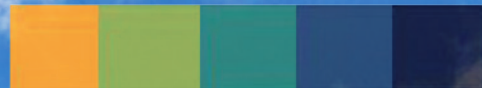
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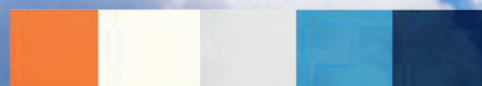
G R O W



P L A N



L E A R N









# COMMUNITY FOUNDATION

JEFFERSON COUNTY

Dear Friends,

2019 was an incredible year for the Community Foundation. We received 719 donations totaling over \$964,000. As you can see in the pie chart below, 74.3% of the tax-deductible donations we received were \$100 or less. As I have written and said before, we are truly a foundation for the whole community. A portion of these gifts were used to create 13 new endowments (pages 5-7) thanks to generous people who wanted to make an impact in Jefferson County, FOREVER. The market was very kind to our endowed assets and our endowed assets grew 21% to over \$27M, which was a new high point for the Community Foundation.

Thanks to Lilly Endowment Inc.’s GIFT VII Community Leadership Planning Grant, we were able to invest over \$40,000 in our county’s health through the Healthy Communities Initiative (HCI) at the King’s Daughters’ Health (KDH) Foundation (pages 2-4). The Community Foundation and the HCI decided to focus on root causes of the poor health outcomes in Jefferson County by embracing the science of Adverse Childhood Experiences (ACEs) to treat and prevent Toxic Stress. Now understood to be one of the leading causes of everything from heart disease and cancer, to substance abuse and depression, extremely stressful experiences in childhood can alter brain development and have lifelong effects on health and behavior.

A new health challenge arrived in early 2020 – the global COVID-19 pandemic. In addition to the illness, anxiety, and death it brought our region, state, nation, and world, the pandemic sent the market into a freefall for a while. In response to the health and economic crises, the Community Foundation activated our Disaster Relief Fund to support nonprofit organizations as they provided immediate aid to residents impacted by COVID-19. Throughout 2020 and the recovery process, we will continue to support our nonprofit community as they provide programs and services to our fellow residents.

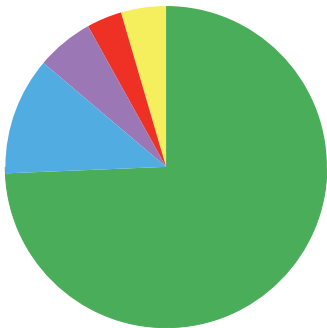
Regarding the losses we have seen in our endowed assets, the Community Foundation and our investment management company, Mason Advisory Services (Mason), have been here before. We are working with Mason to handle this crisis by remaining disciplined and following predetermined strategies so our invested assets will rebound rapidly. Proper diversification allows us to better control risk without sacrificing long-term returns.

As we move forward, the Community Foundation will continue to be a strategic ally with the HCI, the KDH Foundation, and many community stakeholders to implement the plans to address ACEs and Toxic Stress. We are all adversely affected, in one way or another, by health issues in our community. We all need to be a part of the solution and be unified in our desire for a healthier tomorrow.

Sincerely,

Ben Foley  
Board Chair

Bill Barnes  
President & CEO



2019 Donations

- \$100 and less - 74.3%
- \$101 – \$500 - 11.9%
- \$501 – \$1,000 - 5.6%
- \$1,001 – \$5,000 - 3.6%
- \$5,000 AND ABOVE - 4.6%

719 DONATIONS

## COMMITMENT STATEMENT

**“We envision a collaborative effort to prevent and measurably reduce adverse childhood experiences in Jefferson County through honest, continuous community engagement. We will enhance and develop systems that foster resilience and quality of life for generations to come.”**

## Community Leadership Grant Steering Committee

**Bill Barnes**

President & CEO; CFMJC

**Nadja Boone**

Director of Marketing, Community Relations & Development; King’s Daughters’ Health

**Molly Dodge**

Chancellor; Ivy Tech Community College - Madison

**Keith Howard**

Coordinator; Healthy Communities Initiative

**Ann Suchocki**

Board Member; CFMJC

## LEADERSHIP FOR A HEALTHIER COMMUNITY

The end of 2018, Lilly Endowment, Inc. announced the seventh phase of its Giving Indiana Funds for Tomorrow (GIFT) initiative for Indiana community foundations. GIFT was launched in 1990 to help communities throughout Indiana develop the philanthropic capacity to address local needs and challenges. Through this newest phase, known as GIFT VII, the Lilly Endowment is helping Indiana’s community foundations raise financial resources and providing dollars to encourage foundations to take the lead on addressing high-priority challenges and opportunities in the areas they serve.

For the Community Leadership portion of GIFT VII, Lilly Endowment has offered a two-part grant process: a \$50,000 Community Leadership Planning Grant and a \$100,000 Community Leadership Implementation Grant (grant dollar amounts are based on a county’s population).

Jefferson County, like every other county in the state, has challenges that need to be tackled. We are fortunate that our county has been proactive in identifying these challenges and in getting to work on remedying them. During the ENVISION Jefferson County planning process in 2014, community members identified “Promoting health, safety, and well-being” as one of the six initiative areas and goals for the project. From this, the Kings’ Daughters’ Hospital Foundation (KDHF) created the



Healthy Communities Initiative (HCI) in 2017 to address health challenges of residents of Jefferson County. Over 300 volunteers have committed their time and resources in developing strategies to combat challenges in the three pillars of the HCI: Substance Abuse, Healthy Lifestyles, and Mental Health/Zero Suicide Initiative. Since its beginning, the Community Foundation has been a strategic ally and key funder of this program.

The Community Foundation’s Board of Directors successfully applied for the \$50,000 Community Leadership Planning Grant to continue the Foundation’s investment in the community’s health. This grant award has been used in the following ways:

- Hire a consulting firm – The firm, Public Sector Consultants, has helped to identify the assets, resources, and capacity of Jefferson County and community partners. They have also helped the project Steering Committee create a strategic plan to use during the Implementation phase.
- Increasing the capacity of the HCI – Funding was used to double the hours that the current part-time coordinator, Keith Howard, is available to work in connection with the consultants.
- Increase the capacity of CFMJC – Our President & CEO Bill Barnes serves on the Steering Committee for this project. To allow him more time for community leadership activities, part-time employee Julie Wells was hired to provide additional office support and to oversee the Foundation’s Scholarship processes. This shift has allowed staff member Kelley Hoagland to assist Bill with asset development activities.



# Healthy Communities of Jefferson County

As of press time of this report, CFMJJC has applied for the \$100,000 Community Leadership Implementation Grant. The focus of the grant is to address some of the issues that many of Jefferson County's youngest citizens face, allowing progress toward better health outcomes. Identifying these problems comes through the study of Adverse Childhood Experiences (ACEs). According to the Center for Disease Control and Prevention (CDC), ACEs are "all types of abuse, neglect, and other potentially traumatic experiences that occur to people under the age of 18." People who face these traumatic experiences as children are more likely to face both physical and mental health issues as adults. In fact, the more ACEs a child experiences, the greater the risk for future problems.

"Both the KDH Foundation and Community Foundation believe that we need to focus on root causes of the poor health outcomes we're all witnessing," said Barnes. "So much of the funding at local, state, and national levels address the symptoms **downstream**, rather than seeking the causes and investing in prevention **upstream**. We believe the best path is to identify evidence-based approaches that will improve the health of the residents of Jefferson County."

According to a review of multiple ACEs on overall health published in The Lancet Public Health journal, it is apparent that "individuals with at least four ACEs were at increased risk of all health outcomes compared with individuals with no ACEs. Associations were weak or modest for physical inactivity, overweight or obesity,



Community members listen attentively to facilitators during the November 20, 2019 planning session. A second session was held on January 23, 2020. Over 40 people representing a variety of sectors – including business, education, government, healthcare, religion, the courts, law enforcement, the media, and children's advocacy – attended and participated over the course of the two meetings. (Photo courtesy of the Healthy Communities Initiative of Jefferson County)

## ACEs = Adverse Childhood Experiences

"ACEs are all types of abuse, neglect, and other potentially traumatic experiences that occur to people under the age of 18."

### ACEs include:

- Emotional Abuse
- Physical Abuse
- Sexual Abuse
- Domestic Violence in the household
- Separated or Divorced parents
- Mental Illness in the household
- Substance Abuse in the household
- Incarcerated household member
- Emotional Neglect
- Physical Neglect

"The body of research sparked by the ACE Study makes it clear that adverse childhood experiences in and of themselves are a risk factor for many of the most common and serious diseases in the United States (and worldwide), regardless of income or race or access to care."

NADINE BURKE HARRIS, THE  
DEEPEST WELL: HEALING AND  
THE LONG-TERM EFFECTS OF  
CHILDHOOD ADVERSITY

and diabetes..., moderate smoking, heavy alcohol use, poor self-rated health, cancer, heart disease, and respiratory disease..., strong for sexual risk taking, mental ill health, and problematic alcohol use..., and strongest for problematic drug use and interpersonal and self-directed violence.”<sup>1</sup> (Hughes et al. e356)

The grant application proposes a three-year timeline for implementation based on the strategic plan created during the planning grant process. During this period, the HCI Coordinator position would become a full-time position to oversee the progress of the initiative. Main objectives for the Coordinator would be to provide ACEs and trauma training to members of the community, and to develop a website and brand identity.

A myriad of volunteers will be utilized in teams to accomplish the strategic plan’s six major goals that are as follows:

1. Collect and analyze actionable data on ACEs, health-related risk behaviors, and health outcomes
2. Formalize commitments to strategic plan implementation among key stakeholders
3. Provide ACEs/trauma training opportunities for Jefferson County professionals working with children and families
4. Address the mental health shortage by increasing mental health staff and services available to Jefferson County residents
5. Increase utilization of new or existing strategies to prevent ACEs and increase resilience among priority populations
6. Develop and implement a county-wide communications plan to advance strategic plan goals one through five, and to educate the community about ACEs

The Community Foundation of Madison and Jefferson County has already invested extensive financial and time resources into this proposal and, regardless of the outcome of the current grant application process, will continue to support the HCI in providing better health outcomes and making Jefferson County a great place to live and work.

1.Hughes, Karen et al., The Lancet Public Health, vol. 2, no. 8, August 2017, e356-366.

“Childhood adversity is a story we think we know. Children have faced trauma and stress in the form of abuse, neglect, violence, and fear since God was a boy. Parents have been getting trashed, getting arrested, and getting divorced for almost as long. The people who are smart and strong enough are able to rise above the past and triumph through the force of their own will and resilience. Or are they?”

**NADINE BURKE HARRIS, THE DEEPEST WELL: HEALING AND THE LONG-TERM EFFECTS OF CHILDHOOD ADVERSITY**





**In 2019, the Community Foundation had 13 new endowments established. Read on to find out more about our different endowment types and about the donors who established these new funds.**

## AGENCY FUNDS

**provide an avenue for nonprofit organizations to invest their own money and create a perpetual stream of support for their mission. The minimum amount to establish an Agency Fund is \$5,000.**

### Deputy Volunteer Fire Company Endowment

In December 2018, the Deputy Volunteer Fire Company lost its firehouse, three trucks, and some equipment due to a fire. The community has been very generous in supporting the company as they rebuild. The leaders of the fire company also saw this as an opportunity to think about the long-term sustainability of the company and created the Deputy Volunteer Fire Company Endowment this year. Annual grants from this Agency Fund will support the fire company as they continue to carry out their mission to protect and serve the Deputy community.



## DESIGNATED FUNDS

**provide donors the ability to create a steady stream of income to one or more specific charities – forever. The minimum amount to establish a Designated Fund is \$5,000.**

### For the Little Ones Fund: Madison Consolidated Schools Pre-Kindergarten Program Endowment

Bob and Mary Kraft have worked with children in various situations – schools (K-12), scouts, sports, and as parents of three! The Krafts believe that all children are special and deserve “positive feelings” such as a sense of belonging, knowledge of their importance in the world, developing decision making skills, coping with adversity, finding joy, and many more. Bob and Mary established this Designated Endowment to help provide support to educators with those situations outside of the basic requirements of education. Annual grants from this fund will be made to support the Madison Consolidated Pre-Kindergarten program.



### Indiana Veterans Memorial Cemetery Endowment

The Jefferson County Veterans Council established the Indiana Veterans Memorial Cemetery Endowment. The cemetery opened in Madison on December 1, 1999 and is the only cemetery of its kind in the state of Indiana. This Designated Endowment will provide annual funding to contribute to beautification, hospitality, community events, and programming at the cemetery.



# DONOR ADVISED FUNDS

allow donors to recommend the charitable organizations that benefit from the fund's annual distribution. Donor Advised Funds are a cost-effective and efficient alternative to a private or family foundation. The minimum amount to establish a Donor Advised Fund is \$5,000.

## Dan and Molly Baughman Charitable Fund

This Donor Advised Fund was established by Dan Baughman and Molly Dodge Baughman to invest in Jefferson County's future. They are dedicated supporters and volunteers for many local agencies and value the services they provide in our community. Each year, Dan and Molly will select the charities that will benefit from the fund's grants to support the causes they care about most.



## Dorsey Family Endowment

This Donor Advised Fund was established by Laurie and Mike Dorsey. This fund has been created as a way of giving to and having an impact on the causes they care about in their community for many years to come. The Dorseys will designate which charitable organizations will benefit from the fund's annual grants.



## Jason and Marlana Schafer Family Charitable Fund

This Donor Advised Fund was established by Jason and Marlana Schafer. The Schafers saw the creation of this fund as a way to make a lasting impact on the community they love and have resided in for almost their entire lives. Each year, Jason and Marlana will select the charities that will benefit from the fund's grants giving them maximum flexibility in their philanthropy.



## Evelyn Wheeler Charitable Endowment

This donor advised fund was established by the Reverend Evelyn Wheeler. She serves as the pastor of Christ Episcopal Church and knows that it is important to building relationships with and care for not only church members, but also the community at large. Each year, Evelyn will select organizations to receive grants, helping to fund the causes she is passionate about, including organizations that support civil rights and equitable justice for persons of color and LGBTQIA persons.



# FLEXIBLE COMMUNITY FUNDS

give the Community Foundation the flexibility to assist nonprofits annually through grants. Through these funds, donors create a lasting legacy to fulfill the ever-changing needs and dreams of the people of Jefferson County. The minimum amount to establish a Flexible Community Fund is \$5,000.

## Devon and Rachel Sharpe Endowment

Devon and Rachel Sharpe established a Flexible Community Fund this year to help make a difference in Jefferson County. They chose this type of endowment so grant dollars can be directed where and when they are needed most for many generations to come.



## Norbert A. "Tony" Steinhardt, Jr. and Phyllis Steinhardt Family Endowment

This Flexible Community Fund was established by Tony and Phyllis Steinhardt. Tony and Phyllis have supported many community organizations over the years, personally and through their business, Steinhardt Heating and Air Conditioning. Annual grants from this fund will be utilized during the Foundation's competitive grants cycle to address the current needs of Jefferson County.





# FIELD OF INTEREST FUNDS

provide support to a donor's particular area of interest. The Community Foundation staff, Grants Committee, and Board of Directors identify projects that elevate and support these specialized interests. The minimum amount to establish a Field of Interest Fund is \$5,000.

## Madison Beautification Fund

Glenna Hanks Wade established this Field of Interest Fund to provide funding for two things that she is passionate about: landscaping and public art. Glenna began her 30-year Purdue Extension career in Jefferson County and returned after retiring.



“Madison has always been that special place since the early 70s that I kept coming back to.” She wanted to invest in this community to provide a visual awareness of pride for its citizens and those who come to visit. Annual grants from this fund will be used during the Community Foundation’s Competitive Grants Process to fund landscaping and/or public art projects in Downtown Madison.

# SCHOLARSHIP FUNDS

support local students pursuing their academic goals following high school. The minimum amount to establish a scholarship fund is \$20,000.

## Madison Kiwanis – Connor K. Salm Scholarship

This Scholarship Fund was established by the Kiwanis Club of Madison. The mission of the Kiwanis is to “make a lasting difference in the lives of children.” The scholarship is named in memory of Connor K. Salm, who was a former teacher and principal of Madison Consolidated High School. Salm also served as the Madison chapter President and the Indiana District Governor. This scholarship will be awarded to Jefferson County students continuing their education at a post-secondary school.



In addition to the funds mentioned previous, we offer two more types of funds:

# ACORN FUNDS

allow donors to establish a fund over a period of time until they reach the fund minimum. The founding donors pledge to contribute annually to the endowment, usually over a five-year period. Acorn funds are an ideal vehicle for family members, co-workers, classmates, friends, or neighbors to establish a fund over time to support charitable causes that are meaningful to them.



## Carolyn Bruce Spicer and Gene E. Spicer Nursing Scholarship

Carolyn and Gene Spicer have established this Scholarship Fund. Carolyn was a nurse for 45 years and wanted this endowment to help graduating high school seniors and area nurses attain their nursing education. Scholarships will be awarded to a Madison Consolidated graduating senior planning to pursue an Associate or bachelor’s degree in Nursing. An additional scholarship will be awarded to registered nurses in Jefferson, Jennings, Clark, Ripley, Scott, or Switzerland Counties, IN, or Carroll or Trimble Counties, KY who have their associate degree in Nursing and are planning to pursue their bachelor’s degree in Nursing.



## COMMUNITY FOUNDATION ENDOWMENTS

The funds listed below demonstrate what a wide variety of interests people have. Each of them is established with a fund agreement, which directs how the donor wants grants used now and far into the future. The endowments are pooled for investment purposes but accounted for separately. Anyone can add to any fund at any time in any amount. What interests you?

### ANIMALS

- Jerry E. Andress Memorial Animal Shelter Endowment (2008)
- Community Spay/Neuter Fund (2011)
- Friends of the Jefferson County Animal Shelter (2008)
- Jefferson County Animal Welfare Fund Endowment (2017)
- Madison-Jefferson County Humane Society, Inc. Audrey M. Smith Chapter Fund (1994)
- Spirit's Fund (pet responsibility education for youth) (2004)

### THE ARTS

- Community Endowment for the Arts (1996)
- Harold A. "Hal" Davis Memorial Endowment for the Arts (2017)
- Madison Area Arts Alliance Endowment (2018)

### COMMUNITY CONSERVATION

- Broadway Fountain Endowment Fund (2000)
- Catholic Cemeteries of Jefferson County Fund (2017)
- College Hills Cemetery Endowment (2015)
- Friends of Hargan-Matthews Park Fund (2017)
- Historic Eleutherian College Memorial Endowment (2016)
- Historic Hoosier Hills RC&D Endowment Fund (1995)
- Jefferson County Historical Society Endowment Fund (1993)
- Jefferson County Medical Society Endowment Fund fbo Dr. Hutching's Office (1997)
- Lanier Mansion Endowment (2018)
- Madison Riverfront Development Corporation Endowment (2018)
- Madison Riverfront Endowment Fund (1995)
- Endowment for Pearl Park (2009)
- Rogers Family Memorial Historical Research Fund (Jefferson Co. Historical Society) (2008)

- Save Our History Endowment (Jefferson Co. Historical Society) (2017)
- The Weinberg Family Fund (1995)

### COMMUNITY SERVICE

- Clearinghouse of Jefferson County Endowment Fund (2014)
- Greg Cloud Memorial Endowment (fire companies) (2007)
- Community Foundation Administrative Fund (1996)
- Deputy Volunteer Fire Company Endowment (2019)
- James T. and Jennie P. Ford Endowment for the Kent Volunteer Fire Co. (1997)
- Friends of the Madison-Jefferson County Public Library Endowment (2015)
- Richard Tevis Heck/Ruth Irwin Heck Fund for the Hanover Volunteer Fire Co. (1997)
- Jefferson County House of Hope Endowment in Memory of Patty Cooper (2016)
- Ladies' Auxiliary of Kent Fire Department Endowment Fund (1996)
- Retired Seniors Volunteer Program Endowment (2007)
- Salvation Army Endowment in Memory of Tom Palfreeman (2016)
- Stellar Madison Fund (2017)
- Tri-Centennial Observance Fund (our Nation's Tri-Centennial in 2076) (1994)
- Youth As Resources, Jefferson County, Endowment Fund (2001)

### EDUCATION

- Mary Battles Canida Memorial Endowment (2013)
- Patty Cooper Memorial Endowment for Hanover Presbyterian Church Preschool (2016)
- Marty and Bea Ferguson Endowment (Prince of Peace Catholic Schools) (2008)

- For the Little Ones Fund: Madison Consolidated Schools Pre-Kindergarten Program Endowment (2019)
- Dr. Gertrude Geraets Memorial Fund for Prince of Peace Catholic Schools (2015)
- Nathan Hadley Memorial Fund for MCHS Career Readiness (2017)
- Hanover Community Education Fund (2006)
- Madison Consolidated High School Special Education Endowment (2012)
- Madison Consolidated Schools Educational Foundation Funds (1994)
- Madison-Jefferson County Public Library Endowment Fund (2001)
- MJHS Peer Counseling Endowment in Honor of Dianna Risk (2007)
- Pope John Elementary School Children's Fund (2003)
- Southwestern Schools Endowment in Memory of Kenneth Stier (2017)
- Deborah Lynn Taylor Memorial Endowment Fund (E.O. Muncie student assistance) (1999)
- Betty S. Wynn Memorial Fund (Business Teacher Professional Development at Madison Consolidated H.S.) (2010)

### THE ELDERLY

- Hagemann Endowment Fund for Meals on Wheels (2002)
- Lifetime Resources Senior Services Development Fund (1997)

### THE ENVIRONMENT

- Richard Tevis Heck/Ruth Irwin Heck Fund (Indiana Foresters) (1995)
- Heritage Trail Conservancy Endowment (2011)
- John Paul Park Conservancy Endowment (2012)
- Frieda Suppes Jones/John Price Jones Memorial Fund (Jefferson County Environment) (1993)
- Madison Beautification Fund (2019)

### HEALTH

- B.R. and H.L. Alexander Memorial Endowment for H.O.P.P.S. (Helping Our Pediatric Patients Smile) (2015)
- Bethany Circle/Della Courtney Memorial Endowment Fund (KDH) (2000)





- Centerstone Mental Health Fund for Jefferson County (2008)
- Developmental Services, Inc. Endowment Fund (2000)
- Domestic Violence Support Fund (Safe Passage, Inc.) (2018)
- Wanda Jackson Sunshine Fund for Huntington’s Disease (2016)
- King’s Daughters’ Hospital Fund (1995)
- King’s Daughters’ Hospital/William G. Crosby Fund for Pediatrics (1992)
- Life Choices Clinic Endowment (2016)
- Beverly McGuire Scott Memorial Fund (KDH - Oncology) (1995)

**RELIGION**

- Jeanne Bunton Memorial Endowment for Madison Presbyterian Church (2000)
- Christ Episcopal Church Endowment Fund (2008)
- First Christian Church Endowment (2015)
- Hanover Presbyterian Church Fund (1995)
- Hanover United Methodist Church Endowment Fund (1997)
- Richard Tevis Heck/Ruth Irwin Heck Fund for Madison Presbyterian Church (2002)
- Kessler and Lawrence Family Endowment fbo Christ Episcopal Church (1999)
- Roland Lichlyter Fund for the Hanover United Methodist Church (2014)

- Arleida R. Metz Memorial Fund (Prince of Peace Catholic Parish) (1994)

**VETERANS**

- Caring for Veterans Fund (2015)
- Jefferson County Veterans Fund (Jefferson County Veterans Council) (2015)

**YOUTH**

- Gerald Amos Memorial Endowment Fund (intellectually challenged children) (1996)
- Big Brothers/Big Sisters of Jefferson County Endowment Fund (1998)
- Eleanor T. Birk Foundation Youth Fund (2015)
- Boy Scout Camp Louis Ernst Fund in Honor of Don Riley and Perin Scott (2018)
- James M. Demaree Memorial Fund (Girls, Inc.) (1995)
- Justin Geyman Memorial Endowment (Jefferson County Soccer Association) (2007)
- Girls Inc. of Jefferson County Endowment Fund (1994)
- Hanover Fund for Youth (1996)
- Jefferson County 4-H Horse & Pony Program Fund in Memory of Helen Kreeger (2017)
- Jefferson County 4-H Development Fund (1996)
- Jefferson County Youth Fund established by the Goodmans (1998)

- Jefferson County Youth Shelter Endowment in Memory of John Clapham (1998)
- Delbert O. King Memorial Endowment Fund (2000)
- Lide White Memorial Boys & Girls Club Endowment Fund (1998)
- Dr. Marcella S. Modisett Endowment for Girl Scouts of Kentuckiana (1996)
- Dr. Harve and Joyce Rawson Memorial Endowment (Englishton Park) (2008)
- Barbara Trimble Memorial Fund for Girls Inc. (2015)

**MULTIPLE**

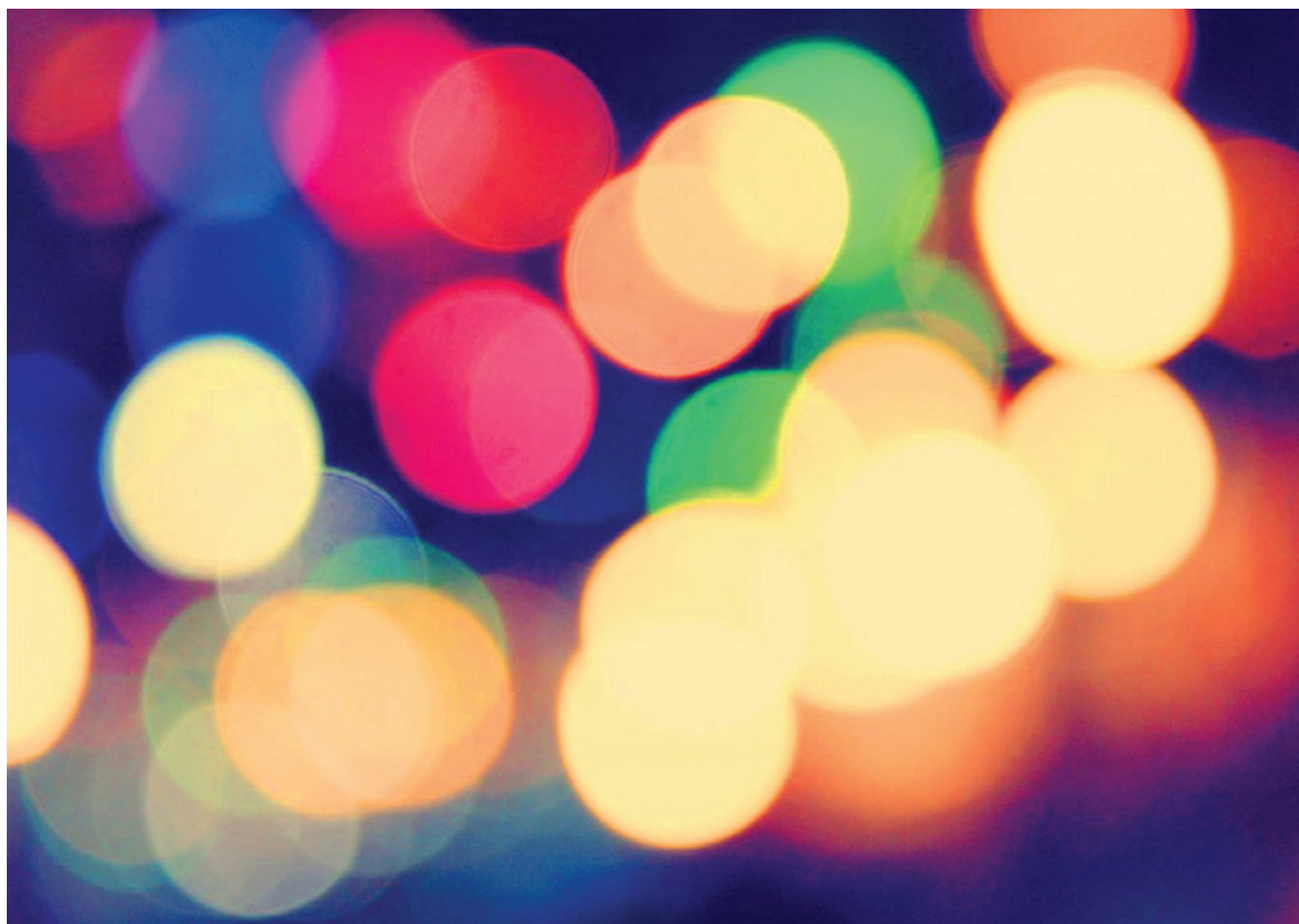
- Carl J. and Mary M. Hoeftling Fund (First Christian Church, Jefferson County Historical Society, Pilot Club, and Retired & Senior Volunteer Program) (2001)
- Larry and Charmaine Owens Endowment (Girls Inc., Madison-Jefferson County Public Library, Madison Rotary Club scholarship program) (2008)
- Schroeder Foundation Endowment Fund (local social service agencies) (1993)
- William F. Stephan Family Fund (Heritage Trail Conservancy, Jefferson County Veterans Council, LifeTime Resources, and Madison Riverfront Development Corporation)
- Women’s Giving Circle Endowment in Memory of Bonnie Hare (agencies serving women and children) (2012)

## DONOR-ADVISED FUNDS

- Dan and Molly Baughman Charitable Fund (2019)
- Bethany Circle/Mary E. & Artz Ellis Memorial Fund (1994)
- Canida/Knox Family Fund (1993)
- Children's Fund of Jefferson County (2013)
- Cronen/Marsiglio Family Endowment Fund (1997)
- Dorsey Family Endowment (2019)
- Bob and Brenda Eversole Endowment (2011)
- Grandma's Cookie Jar Fund in Memory of Rita Miller Adams (2011)
- Tony Greco Memorial Fund for the Arts (2015)
- Grote Lamplighters Endowment (2018)
- Brok D. Hensler Memorial Endowment (2002)
- Howard and Mary Muncie Hensler Memorial Fund (2017)
- Mike Hess Memorial Endowment (2012)
- Hubbard Family Endowment (2018)
- Kristen E. Kemper Memorial Endowment (2008)
- Kings' Daughters' Health Community Health Initiatives Endowment (2000)
- Lichlyter Fund for Youth (2019)
- Madison Chemical Company, Inc. Employees Fund (1997)
- James A. and Dixie J. McDonough Art Education Fund (1999)
- McKay Family Fund (2013)
- Jon Menke Memorial Endowment (2008)
- Morgan Family Advised Fund (1996)
- Mickie Nethery Memorial Endowment (2007)
- Dr. John W. Petscher Memorial Endowment (2012)
- Neida Rogers Memorial Endowment for Music (2008)
- Fernando and Julie Rubio Charitable Endowment (2018)
- Jason and Marlana Schafer Family Charitable Fund (2019)
- Skiles Family Endowment Fund (1997)
- Clifford O. Taylor Memorial Fund for the Performing Arts (2001)
- Vecchie-Campbell Family Endowment (2019)
- The Wallis Family Fund (1993)
- Tony and Robin Waltz Family Fund (2014)
- Evelyn Wheeler Charitable Endowment (2019)
- John and Maureen Wurtz Charitable Fund (2015)

## SCHOLARSHIPS

- Sharon Thom Alcorn Memorial Scholarship (1998)
- M.W. Anderson Scholarship (1997)
- Helyn Bishop Scholarship (2004)
- Broadway School Alumni Scholarship (1996)
- Keith Brooks Memorial Scholarship (1996)
- Calvin Family Scholarship (2013)
- CAM Car Club Scholarship (2016)
- Hendricks R. Canida Scholarship Contest Fund (2014)
- Tiffany Lee Carter Memorial Scholarship (2003)
- Gary Chapman Memorial Scholarship Fund for the Arts (2018)
- Lisa Cheatham Memorial Scholarship (2008)
- The Chan Chilton Memorial Scholarship (1998)
- Class of '84 Scholarship (1995)
- Joseph V. Cline Scholarship (1994)





- Thomas D. Craft, Jr. Memorial Scholarship (2007)
- Christie Crafton Memorial Scholarship (1995)
- Norma A. Cull Memorial Scholarship (1994)
- Deputy Alumni Scholarship (1997)
- Dupont Alumni Scholarship (2000)
- Frances K. Eisan Memorial Scholarship (2013)
- Mabel Green Memorial Scholarship (1995)
- Hall Family Scholarship (1994)
- The Hanover College/Paul Ogle Fund (Hanover College) (1993)
- Marjorie Cornell Hare Nursing Scholarship Fund (Ivy Tech) (2012)
- Dr. Fred S. Henderson Family Scholarship Fund (Trinity United Methodist Church) (2015)
- Dennis Holt Memorial Scholarship (2000)
- Glenn G. and Dorothy Ebel Huntington Memorial Scholarship (1999)
- Jefferson County 4-H Scholarship (1997)
- Ralph and Robyn Jones Family Memorial Scholarship (1998)
- Charles H. and C. Chris Keller Scholarship (1994)
- George and June Kirk Scholarship (1999)
- Fred and Judy Koehler Family Scholarship Fund (2017)
- Dorothy B. Lotz Scholarship (1995)
- Madison Chautauqua Scholarship For the Arts in Memory of Bob Fourhman (1994)
- MCHS Class of 1966 Scholarship Fund (2011)
- Madison Kiwanis – Connor K. Salm Scholarship (2019)
- Lynn A. Maricle Music Scholarship (2006)
- Dale McNeely Scholarship Fund (2009)
- Father Hilary G. Meny Scholarship (1994)
- George and June Miller Memorial Scholarship (2014)
- Marcia S. Morrill Scholarship of the Madison Rotary Club (1996)
- Terri Nighbert Memorial Scholarship (1998)

- Bill Oldaker Scholarship Fund of the Madison Rotary Club (1992)
- Brad O’Leary Scholarship (2001)
- Mary Patterson Scholarship (2014)
- Troy Allen Pyles Memorial Scholarship (2004)
- Dr. Harve E. and Joyce E. Rawson Scholarship (Franklin College) (1999)
- J. Michael Sample Memorial Scholarship for Music (1997)
- Bonnie and Printis Shelton Scholarship Fund (2018)
- Carolyn Bruce Spicer and Gene E. Spicer Nursing Scholarship (2019)
- Brian W. Stites Memorial Scholarship (1996)
- Erin Turner Memorial Scholarship (2002)
- Dana Vail Scholarship (2004)
- Nathan Wilson Memorial Mathematics Scholarship (1998)
- The Wood Memorial Scholarship (1995)
- Curtis Wright Memorial Scholarship (1999)

#### ACORN FUNDS

Acorn Funds allow donors to establish a fund over a period of time until they reach the fund minimum. The founding donors pledge to contribute annually to the endowment, usually over a five-year period.

#### NONPERMANENT FUNDS

These advised funds are established with the purpose of spending their entire principal. Donors annually decide how much they want to donate to charities, make a lump sum gift into their fund (usually of appreciated stock) in that amount, and then advise the Foundation on how they would like the available money distributed to nonprofit organizations.

- Alex Feltner Memorial Fund (2016)
- Fred and Judy Koehler Charitable Fund (2016)
- Bill and June Nighbert Charitable Fund (2006)

#### FLEXIBLE COMMUNITY FUNDS (UNRESTRICTED ENDOWMENTS)

- 7 Hugs: The David E. and Sally Kirk Webster Family Endowment (2018)
- Bill and Stacy Barnes Charitable Endowment (2018)
- Eleanor T. Birk Foundation Community Fund (2018)
- Community Foundation Board Member and Alumni Fund (2014)
- Barbara Ann Cowan Memorial Fund (2002)
- Cronen/Marsiglio Family Unrestricted Endowment (2002)
- First Financial Bank Community Fund (2015)
- Gardner Insurance Agency Community Fund (2015)
- German American Bank Endowment (2018)
- The Douglas and Ann Grahn Endowment (2002)
- Walter A. and Jean Graham Greiner Memorial Fund (1994)
- Al and Connie Huntington Family Community Fund (2014)
- Jefferson County Enrichment Endowment (2001)
- Jenner Family Endowment (2018)
- The Lineburg Family Endowment (2002)
- Madison Precision Products Community Fund (2014)
- Gil and Trudy McCoy Unrestricted Endowment (2001)
- The John Morgan Family Fund (2002)
- Rinda Rains Memorial Endowment (2002)
- Julius “Bud” and Irene Ritter Memorial Endowment (2001)
- Margaret Francis Seifert and Gregory A. Russell Endowment (2014)
- Sherman, Barber, & Mullikin Fund for Jefferson County (2018)
- Norbert A. “Tony” and Phyllis Steinhardt Family Endowment (2019)
- Nancy J. Strandmark Memorial Fund (2017)
- Ann Suchocki and Jim Mason Family Fund (2014)
- Tribute and Memorial Fund (1992)
- Vehicle Service Group Employee Endowment (2015)
- George Wagoner, MD and Marjorie Jefferies Wagoner, MD Fund (2001)
- Don R. Wallis Memorial Fund (1992)

HONORING COMMITMENT  
TO JEFFERSON COUNTY'S  
FUTURE

The Legacy Society honors individuals who have demonstrated commitment to their community by including The Community Foundation in their estate planning. Too often, these gifts are unrecognized because they come at the end of the donors' lives. The Legacy Society was established in 2003 as a way to publically thank these donors during their lifetimes. In 2019, we added two new individuals to our roster of members.

Membership in the Legacy Society ensures that donors' charitable dollars are utilized in the way they intended. Planned giving may be used to create a new fund, contribute to any of the Foundation's existing funds, or be distributed at the discretion of the Community Foundation Grants Committee.

The Legacy Society has no minimum gift requirement, as each commitment represents a pledge to the community and its future through philanthropy. Membership is voluntary and free. There are several ways to give including bequests, beneficiary of IRAs and insurance policies, charitable remainder trusts, charitable gift annuities, and charitable lead trusts.

Jim Jackson and Alice Carlson-Jackson served in Jefferson County as medical professionals for many years. Alice also served on the Community Foundation Board of Directors from 2004-2009. Jim and Alice joined our Legacy Society in 2016 and share why they made that decision:



*"Alice and I are proud to be members of The Legacy Society; during our 20 years living in Madison, the community has been very supportive to us. The Community Foundation has allowed us to "give back" to Madison and Jefferson County by bequests through The Legacy Society in a manner that reflects our interests and beliefs. We know the Community Foundation is a good financial steward of our donation and enhances the quality of life for all the citizens of the area."*

James W. Jackson, M.D.  
Alice Carlson Jackson, C.N.P.

Have you given any thought about what will happen  
to your estate after you've passed on?

Life has inevitable ups and downs. Understandably, many people want to make sure that their family members are taken care after they are gone. But have you also considered leaving a legacy for your community? There are many ways to make a planned gift to the Community Foundation, or any nonprofit organization you love.

Contact Bill Barnes at 812-274-0241 or by email at [bill@cfmjc.org](mailto:bill@cfmjc.org), and he can share with you the easy options of creating your legacy for Jefferson County's future.

LEGACY SOCIETY MEMBERS:

Dwight & Rita Addleman  
Bill & Stacy Barnes  
Tim & Kim Breeding  
Kate & Michael Brown  
Bob & Charlotte Canida  
Dean & Jana Clapham  
Don & Peggy Clapham  
Mary Clashman  
Mike & Laurie Dorsey  
Bob & Brenda Eversole  
George Freeman  
Dick & Connie Goodman  
Douglas & Ann Grahn  
Meredith Gregg  
Glenna Hanks Wade \*

John Hawk  
Bill & Jennifer Hensler  
Kelley Hoagland  
Bob & Claudia Hoban  
James & Sherrill Holt  
Al & Connie Huntington  
Jim Jackson & Alice Carlson Jackson  
Curt & Nancy Jacobs  
Kevin Kellems  
Chris & Karol Kirk  
Fred & Judy Koehler  
Connie Mahoney  
Allen Manning  
Bill & Louise Markel

Don & Caroline McCauley  
Gil & Trudy McCoy  
William & Edna Meyers  
Gerry Michl  
Marcella Modisett  
Don & Yolanda Phillips  
Dale & Kay Rankin  
Harve & Joyce Rawson  
Wendell & Debbie Seaborne  
David & Betty Sebree  
Ralph & Margaret Seifert  
Printis & Bonnie Shelton  
Donald N. Smith  
William Stephan

Steven Strandmark  
June Taylor  
William & Nancy Underwood  
Henry Van Leeuwen  
Jan Vetthus  
Mary Goode Wallis  
Tony & Robin Waltz  
David & Sally Webster  
Suzanne Williams \*  
John & Maureen Wurtz

\*indicates new members



# LEADERSHIP *Jefferson County*

BUILDING RELATIONSHIPS FOR THE FUTURE OF OUR COMMUNITY

Thirteen community members participated and graduated as the Leadership Jefferson County Class of 2019. Leadership Jefferson County is a bi-weekly, 10 session course comprised of topics to give participants a better understanding of resources and relationships in Jefferson County, including an orientation and sessions on:

**Business & Economics**

**Education**

**Government Agencies & Organizations**

**Healthcare**

**History**

**Industry & Agriculture**

**Nonprofits & Volunteerism**

**Social Services**

**Tourism**

The Community Foundation had the opportunity to host the Nonprofits & Volunteerism session. Bill Barnes gave an overview of what it means to be a 501(c)3 charitable organization, healthy governance practices, and invited two nonprofit organizations, the Jefferson County United Way and the Friends of Hargan-Matthews Park, to share more about their missions and programs.

On May 29, the Leadership Jefferson County Class of 2019 was recognized for completing the program at a special luncheon sponsored by Grote Industries. At the event, two members of the Class of 2019 shared what they had taken away from the previous 10 sessions. Class member Joyce Flanagan shared with luncheon attendees that her experience in Leadership Jefferson County was very meaningful. She said that participating “provided opportunities to better



understand myself, to get to know and appreciate my fellow classmates, and to receive and process a wealth of information presented by an impressive array of community members.” Flanagan continued by saying, “I’m seeing this town through new eyes and have gained the motivation and confidence to begin to step outside of my comfort zone and participate as a community member.” Class member Josh Hershberger echoed Flanagan’s sentiments and said that Leadership Jefferson County “was an invaluable experience and helped me better understand the various sectors in our community (such as government, healthcare, nonprofits, education, etc.) and how they work together to encourage growth and build a thriving community. I highly recommend this program for anyone that is committed to this area and wants to keep Jefferson County a remarkable place to work and live.” The luncheon concluded with a presentation of awards to the graduating members of the Class of 2019.

Congratulations to the 2019 graduates of Leadership Jefferson County! We look forward to seeing the impact you make on our community!



**2019 Leadership Jefferson County Class**

Front Row (from left): Beth Lichlyter, SuperATV; Teresa Brawner, Brawner Farms; Amber Finnegan, Jefferson County Court Services; Kaitlyn Campbell, King's Daughters' Health; Sheila Coffin, Jefferson County United Way; and Joyce Flanagan, Hanover College. Back Row (from left): Josh Hershberger,

Hershberger Law; Cesar Perez-Bolivar, Grote Industries; Jason Schafer, Indiana-Kentucky Electric Corp.; Jeff Studebaker, Madison Consolidated Schools; Laura Watson, Madison Precision Products; Brad Wood, River Valley Resources; and Angie Pelsor, First Financial Bank.



## EMPOWERING WOMEN TO MAKE A DIFFERENCE

Formed in 2012, the Women's Giving Circle of Jefferson County (WGCJC) is a community of philanthropic women of all ages and backgrounds. By combining their financial strength, these women are able to collectively make a positive change for women and children throughout Jefferson County.

Assets of the WGCJC are held and maintained at the Community Foundation through a field of interest pass-through fund and a field of interest endowed fund.

All women in Jefferson County are welcome and invited to join. Membership consists of an annual contribution of \$100, which is tax-deductible. Seventy-five percent of each membership is used to make the annual grants, while twenty-five percent is invested in the WGCJC endowment. Junior Memberships are available for young ladies ages 18 and under for \$50, and are split \$25/\$25.



## HOW WE GIVE

The WGCJC makes grants annually to organizations that have the greatest potential to help the women and children of Jefferson County. The Grants Sub-Circle reviews applications and provides grant recommendations to the general membership, which then votes on the recommendations at the annual meeting/dinner in the Spring. Grants are focused on the following four fields of interest, with the specific purpose of benefitting women and/or children:

- Education
- Economic Empowerment
- Physical and Mental health
- Violence and Crime

## THE GOALS OF THE WGCJC

- Make a significant difference in the community by empowering women to contribute time, talents, and monetary resources to the needs of women, children, and families.
- Educate and increase awareness of the needs of local women, children, and families.
- Provide social opportunities, events, and exposure for women in our community.

## WAYS TO VOLUNTEER

There are several ways to volunteer your time and talents to the Women's Giving Circle. The organization has Sub-Circles (committees) that members can participate in, including:

- Grants
- Governance
- Marketing/PR
- Membership
- Special Events
- Annual Dinner & Fall Luncheon
- Handmade Market



## REMEMBERING BONNIE HARE

During her time on the Community Foundation of Madison & Jefferson County's Board of Directors, Bonnie Hare helped to gather a group of women to create the Women's Giving Circle of Jefferson County. Those women were the first Women's Guiding Circle in 2012, and she was the founding President. After her term of service to the Guiding Circle ended, she continued to support the Women's Giving Circle through her membership and volunteering of her time. Bonnie passed away in August 2019 following a valiant battle against ovarian cancer.

To honor Bonnie's commitment to the Women's Giving Circle and to the community at large, the Women's Guiding Circle and the Community Foundation Board of Directors approved renaming the Women's Giving Circle Endowment Fund to



The Women's Giving Circle of Jefferson County finished 2019 with 228 members! A new competitive grants process was unveiled to utilize grant dollars for the year. Organizations with programs serving women and children in Jefferson County were asked to "Dream Big" and submit proposals for projects needing up to \$10,000. The WGC Grants Committee reviewed the applications and recommended three organizations to give a short presentation about their project at the WGC Annual Dinner. At the event, the membership would vote and rank the presentations to divide the grant money into a \$10,000 1st place award, 2nd place \$5,000 award, and a 3rd place \$4,000 award.

Unfortunately, due to the COVID-19 pandemic, the 2019 WGC members were unable to gather at their Annual Dinner scheduled for April 2020. The WGC Guiding Circle, the steering committee of the WGC program, decided to go ahead and approve \$4,000 grants to help support each of these projects during this difficult time. The organizations and projects are:



**Girls Inc. of Jefferson County** – Girls Inc. Experience programs at the center and at local schools



**Jefferson County Transitional Services, Inc.** – Residential Retention Improvement program at Ruth Haven



**Ryker's Ridge Elementary School** – Amygdala Reset Stations for students and staff members

The WGC Guiding Circle hope that the presentations and voting process will be able to be held later to award the remaining grant funds and continue to make a strong impact in Jefferson County!

# JOIN NOW!

The Women's Giving Circle is open to all Jefferson County women and girls. You can also dedicate your membership or extra gift in memory or in honor of a special woman in your life.

**Call 812-265-3327 and ask Julie Wells for more information!**

the Women's Giving Circle Endowment in Memory of Bonnie Hare. "We are thankful Bonnie's dedication and vision created a strong group of women who work together to improve our community," said 2019 Women's Guiding Circle Chair Elizabeth Auxier.

Since the Women's Giving Circle's creation in 2012, nearly \$150,000 has been granted to programs serving the women and children of Jefferson County.

Bonnie served on the Community Foundation Board of Directors from 2010-2016. During that time, she held the offices of Secretary, Vice-Chair, and Board Chair, which she held from 2013-2014. She also served on the Marketing and Lilly Endowment Community Scholarship committees.

Thank you, Bonnie, for your commitment and service to the Women's Giving Circle and the Community Foundation. You are loved and missed.





## DONORS

2019 Leadership Jefferson  
County Class

David and Lisa Actor  
Tracy Ahlbrand  
Chris Alcorn and family  
Nina Alcorn  
Keith and Nancy Alexander  
Carol Alley, Penny, Barry, and  
families  
Amy and Andréé  
Elizabeth Auxier  
Kendra Auxier  
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 Mark and Melissa Wynn  
 Vernon Wynn  
 Ronald Young  
 Amber Youngblood  
 Pam Zehren  
 Bert Zimmerman

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 Amgen Foundation  
 Arvin Sango Foundation  
 ASG, Inc.  
 Auxier Gas Service, Inc.  
 Auxier Marketing  
 Bethany Circle of King's Daughters' Health  
 Bulk Truck & Transport  
 Clarksville Community School Corporation

Deputy Volunteer Fire Company  
 Disabled American Veterans #55  
 Dragon Sheet Metal  
 Emmons Elementary School  
 First Financial Bank  
 Flojack Harvest Celebration Festival  
 Gardner Insurance Agency  
 German American Bank  
 GoodCoin Foundation  
 Grote Lamplighter Club  
 Jefferson County Courthouse Employees  
 Jefferson County Farm Bureau  
 Jefferson County Genealogical Society  
 Jefferson County Historical Society  
 Jefferson County Industrial Development Corporation  
 Jefferson County United Way, Inc.  
 Jefferson County Veterans Council  
 Jenner Law Office  
 JWS Corp.  
 King's Daughters' Health  
 Koehler Welding Supply, Inc.  
 Kroger Company  
 Lilly Endowment Inc.  
 Lisa's Hope Fund  
 Little Golden Fox  
 Madison Area Chamber of Commerce  
 Madison Chemical Company  
 Madison Dental Health Partners  
 Madison Kiwanis Club  
 Madison Precision Products  
 Madison Riverfront Development Corporation  
 Madison Travel Company  
 Madison Youth Unlimited  
 Mane Attractions  
 Mason & Mefford, Inc.  
 McKay Accounting Service  
 Morgan & Nay Funeral Centre  
 Northern Indiana Community Foundation  
 Old Apple House  
 Sobeck-Boldery Real Estate Account  
 Teton Corporation  
 Trilogy Management Services  
 United Way of Bartholomew County  
 Womens Democrat Organization

## TRUSTS & ESTATES

Ann Wagoner Grahn Trust  
 Anna & Charles O'Banion Trust  
 Estate of Douglas Grahn

## IN MEMORY OF:

### Samuel Bennett

Gary and Sue Kemper

### Dorothy Bersch

McKay Accounting Service  
 William and Priscilla Torline  
 Josh Webb

### Dwight Bruther

Paul and Barbara Ellefsen

### Gary Chapman

Linda Etherton  
 Michael and Vickie Thomas

### Tom Chilton

Carol Alley, Penny, Barry, and families  
 Delbert and Shirly Bear  
 Marilyn Birge  
 Rick Block  
 Judy Chilton  
 Edna Curl  
 Emmons Elementary School  
 Dan and Sandy Harrell  
 Gene Hunt  
 Don and Joyce Imel  
 Virgil Imel  
 Chris and Karol Kirk  
 Aaron and Courtney Koszyk  
 Michael Lichlyter  
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Kyleen Center  
Linda Cheatham  
Mark Cheatham  
Deborah Ciganovich  
Don and Peggy Clapham  
James and Carolyn Clark

Dale and Kathy Crafton  
Larry and Valecia Crisafulli  
Jim and Carri Dirksen  
Paul and Barbara Ellefsen  
Brenda Eversole  
Brian and Stacey Fitzpatrick  
Gary and Reenie Getz  
Mark and Marjorie Goley  
Ann Selby Goodman  
Scott Greiner  
Toni Greiner  
Steve and Pam Hale  
Andrew and Mary Hamilton  
Steve and Cindy Haines  
Chris and Tina Hayes  
Paula Heiderman  
Wilma Henderson  
Michael and Kathy Hensley  
Dan and Laura Hodges  
Michael and Linda Hultman  
Greg and Cindy Hutcherson  
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Michael and Jane Jack  
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Rebecca Jackson  
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Richard and Nancy Jones  
Linda Kittle  
Jake and Shirley Kloepper  
Emeka and Jill Koren  
Catherine Le Saux  
Mike and Janet Lichlyter and family  
McKay Accounting Service  
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Leon and Gerry Michl  
Karen Modisett  
Dorothy Morgan  
Susan Morrison  
Dwight and Anna Nelson  
Molly O'Connor  
Bill and Susan Ohlendorf  
Ted and Sue Page  
Scott Penley  
Tom and Helen Pietrykowski  
Mark and Mary Ann Porter  
Michael and Sally Potter  
Keith and Tammy Proffett  
Gail Ray  
Carolyn Reed  
Susie Robbins  
Kyle and Shalla Russell  
Phil and Anne Saxe  
Vicky Schirmer

Tony and Anne Schroeder  
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Dennis and Margery Smith  
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Scott Tebbe  
Greg and Kim Thomas  
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Sarah Thompson  
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Jefferson County Farm Bureau  
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John and Mary Wilson

**Bill Jenner**  
Paula Burkot  
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John and Mary Griffin  
Bill and Terry Grote  
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Rick and Leslie Grote  
Bill and Jennifer Hensler  
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Al and Connie Huntington  
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Janet Kleopfer  
Koehler Welding Supply, Inc.  
Denny and Beth Kring  
Ralph and Bonnie Lee  
Mary Pedigo  
Don and Yolanda Phillips  
Judy Sanders  
Danny and Judy Schafer  
Pamela Schmidt  
K.M. and C.C. Snell  
Gayle Spaulding  
Nancy Sprunger  
Mike and Harriet Straub  
Karen Todd  
Bob Trimble  
Lane and Jill Turner  
Josh and Rielly Wilber  
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Judy Wright  
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## IN HONOR OF:

**Custer Oratory Contest 2009**  
Noah Hamner

**Yvonne Davis**  
Keith and Karen Howard  
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Paul and Cherri Cronen

**Bob Trimble**  
Dan and Laura Hodges

## COMMUNITY FOUNDATION LEADS EFFORT TO FEED THE HUNGRY

In early 2014, the Board of Directors of the Community Foundation of Madison & Jefferson County (CFMJJC), were discussing how to become closer to the agricultural community in the area. Board Member Joe Jenner suggested purchasing an animal at the Jefferson County 4-H Livestock Auction and donating the animal to the Jefferson County House of Hope food pantry for their meat freezer. That year, the Foundation donated two hogs. Following that positive experience, the Community Foundation donated three hogs in 2015, and the Board has continued to set aside unrestricted dollars to donate livestock each year.

In 2016, CFMJJC President & CEO Bill Barnes and Marketing & Donor Relations Manager Kelley Hoagland created a flyer promoting livestock donation and how the organization Hoosiers Feeding the Hungry would be covering all processing/butchering costs of donations. The flyer included a note that a resident had sent to the House of Hope along with a small donation. The note read: "I have just been blessed with a new job. I know this isn't much, but, God has put it in my heart to give something back for all you have done for my family. Thank you for all you do. God Bless You." The flyer was shared on social media, and Bill and Kelley personally handed it out to buyers prior to the auction. Bill leveraged his relationships with the business community by calling and emailing business owners. With this level of promotion, donations increased to 15. Those 15 animals were the fourth largest food donation in Indiana that year. The House of Hope did a great job of thanking donors, and the promotion is now a joint effort.

Each year, the livestock donations have steadily grown; 21 animals were donated in 2017, 44 in 2018, and 90 in 2019. The momentum created by the Community Foundation has been key

in shining a light on youth development, serving residents in need, and fostering the partnerships of nonprofit organizations. The Jefferson County 4-H Fairboard has seen the value in working with CFMJJC, the House of Hope, and Hoosiers Feeding the Hungry through the livestock auction. When donating animals, more revenue is generated for the 4-Her, the kids get to know that their animal is helping someone in need, and the importance of agriculture in the community is highlighted. They promote the donation opportunity in their annual letter to past buyers. Jefferson County Extension Educator Lonnie Mason celebrated his 50th county fair in that position, so the Fairboard issued the "50 for 50 Challenge". The challenge encouraged buyers to collectively donate at least 50 animals to honor his years of service. The donations exceeded their goal.

Ninety animals – 6 steers, 67 hogs, and 17 lambs – was quite an increase from the first two hogs donated in 2014 by the Community Foundation. The House of Hope Board Members were ecstatic to hear the number of 90. They had three livestock trailers ready to haul the animals but were glad to call on the fourth they had on standby. In a thank you letter from the House of Hope following the auction, they shared that the generosity of buyers will "help the pantry provide supplemental food to more than 1,300 food insecure families residing in Jefferson County."

The Community Foundation is proud to partner with the Jefferson County House of Hope, Hoosiers Feeding the Hungry, and the Jefferson County 4-H program in enriching the lives of residents in the community. Each organization is looking forward to seeing what the next 4-H Livestock Auction has in store!





Since its creation in 1991, the Community Foundation of Madison and Jefferson County has invested nearly \$14 million back into Jefferson County through grants and scholarships. In 2019, the Community Foundation granted a total of \$894,572 from its endowments, with over \$300,000 of that total coming from Flexible Community Funds and Field of Interest Funds.

In April, the Foundation hosted Grant Workshops for nonprofits interested in submitting an application to the competitive grants process. Organizations that attended the workshops learned how to put their “best foot forward” via their application. Foundation staff members shared

an overview of the process timeline, grant guidelines and criteria, how to fill out an online application, and examples of best practices.

On October 1, the 2019 Competitive Grant Cycle Award Reception was held at the Jefferson County Historical Society. For consideration of grant funding, local nonprofit agencies submitted an online application. Selected finalists were asked to host on-site visits so members of the Foundation’s Grants Committee could learn more about the organizations, their projects, and goals. Organizations that received grant funding included:

### Organizations that received grant funding included:

#### **City of Madison — \$19,000**

to support the Stellar Communities designation (part of an \$80,000 multi-year pledge).

#### **City of Madison Fire Department — \$6,200**

to purchase a mobile Forcible Entry Training Simulator Prop and equipment to aid in rescue efforts.

#### **Deputy Volunteer Fire Company — \$19,000**

to support the reconstruction of the company’s fire station (part of a \$38,000 two-year pledge).

#### **Dupont-Lancaster Township Volunteer Fire Department — \$30,000**

to purchase a First-Responder vehicle to help the department serve the community of Dupont and the surrounding area.

#### **Englishton Park Presbyterian Ministries, Inc. — \$1,579**

to purchase a milk cooler for the organization’s Summer Academic Remediation and Training Center.

#### **Girls Inc. of Jefferson County — \$15,000**

to purchase a generator to help the organization continue to serve their members during power outages.

#### **Habitat for Humanity of Jefferson County — \$4,000**

to support the Appliance Disposal Program by making needed repairs to the organization’s box truck.

#### **Hanover College — \$20,000**

to build a wood-fired ceramics kiln for the use of art students and community members in Jefferson County.

#### **Historic Eleutherian College — \$2,500**

to purchase marketing materials and support the creation of a logo for the organization.

#### **Hoosiers Feeding the Hungry — \$10,000**

to support the “Meat” the Need program as it supplies fresh protein sources for food insecure families.

#### **Jefferson County 4-H Club & Agricultural Association — \$30,000**

to support the renovation of the aging Swine Barn at the Jefferson County Fairgrounds.

#### **Jefferson County Sheriff’s Department — \$18,600**

to purchase the Cellbrite Touch 2 software to help local law enforcement pull data and evidence from cellphones.

#### **Jefferson County Southpaws 4-H Dog Club — \$600**

to teach pet responsibility and update training equipment.

#### **Lydia Middleton Elementary School — \$9,000**

to provide staff training to implement the PBIS/House Incentives program at the school.

#### **Madison High School Athletics — \$4,000**

to motorize the displaying of the American Flag inside Connor K. Salm Gymnasium.

#### **Madison Performing Arts Foundation — \$200**

to support a classical harpsichord performance in downtown Madison.

#### **Madison Youth Unlimited — \$10,000**

to support the creation of the Madison Sports Court in downtown Madison.

#### **Prince of Peace Catholic Schools — \$25,000**

to support the renovation of the gymnasium locker rooms at Shawe Memorial Jr./Sr. High School.

#### **Venture Out Business Center Foundation, Inc. — \$15,000**

to support the Get Cooking Madison entrepreneurial food program.

## 2019 Grant Recipients



The 2019 Competitive Grants Cycle awards were made possible by the Community Foundation's Flexible Community Funds and Field of Interest Endowment Funds. To be considered for funding, agencies submitted an online application and, in the case of the finalists, were visited and interviewed by members of the Foundation's Grants Committee.

"Our committee is often asked for more than twice the amount that we have available to grant," said Grants Committee Chair and Community Foundation Board Member Ann Suchocki. "It is an honor to serve with a committee that is committed to the process and have the challenging task of determining the best investment of grant dollars available from the Community Foundation."

**The funds used to make 2019 grants possible included:**

- Eleanor T. Birk Foundation Youth Fund
- Caring for Veterans Fund
- Greg Cloud Memorial Endowment
- Community Endowment for the Arts
- Community Foundation Board Member & Alumni Fund
- Barbara Ann Cowan Memorial Fund
- Cronen/Marsiglio Family Unrestricted Endowment
- Harold A. "Hal" Davis Memorial Endowment for the Arts
- First Financial Bank Community Fund
- Gardner Insurance Agency Community Fund
- The Douglas & Ann Grahn Endowment
- Walter A. & Jean Graham Greiner Memorial Fund
- Hanover Fund for Youth
- Al & Connie Huntington Family Community Fund
- Jefferson County Enrichment Endowment
- Frieda Suppes Jones/John Price Jones Memorial Fund
- The Lineburg Family Endowment
- Madison Precision Products Community Fund





- Gil & Trudy McCoy Unrestricted Endowment
- The John Morgan Family Fund
- Rinda Rains Memorial Endowment
- Julius “Bud” Ritter Memorial Endowment
- Margaret Francis Seifert and Gregory A. Russell Endowment
- Spirit’s Fund
- Nancy J. Strandmark Memorial Fund
- Suchocki-Mason Family Fund
- Tribute and Memorial Fund
- Vehicle Service Group Employee Fund
- George Wagoner, MD & Marjorie Jefferies Wagoner, MD Fund
- Don R. Wallis Memorial Fund

**2019 Community Foundation Grant Winners & Community Foundation Board Members.**

Front Row: (from left) Beth Lichlyter CFMJC Board & Grants Committee Member; Susan Stahl, Girls Inc. of Jefferson County; Paula Hartman, Lydia Middleton Elementary; Samantha Pierce, Habitat for Humanity of Jefferson County; Kelly Seel, Jefferson County Southpaws 4-H Club; Starla Raley, Madison Performing Arts Foundation; Joe Bronkella, Madison Consolidated High School Athletics; Rick Lostutter, Hanover College; JD Webster, CFMJC Board & Grants Committee Member.

Middle Row: (from left) Phil Kahn, Prince of Peace Catholic Schools; Mary Kay McCubbin, Madison Youth Unlimited; Ann Suchocki, CFMJC Board Member & Grants Committee Chair; Ian Waller, Dupont-Lancaster Township Volunteer Fire Department; Dustin Bailey, Historic Eleutherian College; Devon Sharpe, Venture Out Business Center Foundation, Inc.

Back Row: (from left) Yancey Denning, Jefferson County Sheriff’s Department; Larry Truax, Englishton Park Presbyterian Ministries, Inc.; Todd Bruther, CFMJC Board & Grants Committee Member; Mike Hazelwood, Deputy Volunteer Fire Company; Bill DeVries, City of Madison Fire Department; Tanner Mahoney, Jefferson County 4-H Club & Agricultural Association; John Bush, Hoosiers Feeding the Hungry. (Photo Courtesy of Nina Campbell Photography)



## 2019 LILLY ENDOWMENT COMMUNITY SCHOLARSHIP RECIPIENT

As the 2019 Lilly Endowment Community Scholar, Madison Consolidated High School graduate Grace Brautigam received a four-year, full-tuition scholarship and \$900 yearly stipend for required books and equipment. Grace is the daughter of Kay Stokes of Madison and Jeff Brautigam and Robyn Ryle of Madison. She currently attends Indiana University – Bloomington and is pursuing a degree in Environmental Management. She is involved in the Hutton Honors College, the O'Neill School of Public and Environmental Affairs Honors Program, and ICAN, a program that works with service dogs in training. During her time at IU, Grace also plans to study abroad.

"I'm honored that the Community Foundation selected me to be their 2019 Lilly Endowment Community Scholar," Grace said. "All of the finalists were worthy of this award, and it's humbling to be chosen from them. I'm looking forward to the future and to giving back to my community with the opportunities that the Community Foundation has given me."

The scholarships are the result of a statewide Lilly Endowment, Inc. initiative to help Hoosier students reach higher levels of education. Indiana ranks among the lowest states in the percentage of residents over the age of 25 with a bachelor's degree. There were 143 scholarships awarded statewide.



### **Miranda Anderson**

Madison Consolidated High School

- Calvin Family Scholarship
- Troy Allen Pyles Memorial Scholarship

### **Jade Barnes**

Madison Consolidated High School

- Deputy Alumni Scholarship
- Jefferson County 4-H Scholarship
- George and June Kirk Scholarship

### **Tessa Bowling**

Southwestern High School

- Dupont High School Alumni Scholarship
- Jefferson County 4-H Scholarship

### **Grace Brautigam**

Madison Consolidated High School

- Lilly Endowment Community Scholarship

### **Jordyn Bryant**

Madison Consolidated High School

- Madison Chautauqua Scholarship for the Arts in memory of Bob Fourhman

### **Aubreanna Carter**

Madison Consolidated High School

- Ralph and Robyn Jones Family Memorial Scholarship
- Wood Family Memorial Scholarship

### **Makayla Christian**

Shawe Memorial High School

- Community Foundation Scholar Award

### **Bergen Cornelius**

Madison Consolidated High School

- M.W. Anderson Scholarship

### **Juliana Dilk**

Christian Academy of Madison

- George and June Miller Memorial Scholarship

### **Bailey Dyer**

Madison Consolidated High School

- Community Foundation Scholar Award
- Frances K. Eisan Memorial Scholarship
- Jefferson County 4-H Scholarship
- Larry and Charmaine Owens Scholarship of the Madison Rotary Club
- Bonnie and Printis Shelton Scholarship
- Nathan Wilson Memorial Mathematics Scholarship

### **Samantha Elliott**

Christian Academy of Madison

- Dupont Alumni Scholarship
- Jefferson County 4-H Scholarship
- Ralph and Robyn Jones Family Memorial Scholarship

### **Charles Riley Elliott**

Southwestern High School

- Brian W. Stites Memorial Scholarship

### **Maranda Elswick**

Madison Consolidated High School

- Helyn Bishop Scholarship
- Mabel Green Memorial Scholarship
- Brad O'Leary Scholarship

### **Mackenzie Gray**

Madison Consolidated High School

- Dennis Holt Memorial Scholarship
- Jefferson County 4-H Scholarship

### **Sophia Hall**

Madison Consolidated High School

- Community Foundation Scholar Award
- Troy Allen Pyles Memorial Scholarship

### **Cayden Hambrick**

Shawe Memorial High School

- Hall Family Scholarship

### **Renee Hanson**

Madison Consolidated High School

- Tiffany Carter Memorial Scholarship
- Joseph V. Cline Scholarship
- Thomas D. Craft, Jr. Memorial Scholarship







**Erika Hazelwood**

- Madison Consolidated High School
- Carl J. and Mary M. Hoefling Scholarship of the Madison Pilot Club
  - Jefferson County 4-H Scholarship

**Peyton Holt**

- Madison Consolidated High School
- Terri Nighbert Memorial Scholarship

**Hannah Huff**

- Madison Consolidated High School
- Dorothy B. Lotz Scholarship

**Alexis Jester**

- Madison Consolidated High School
- Erin Turner Memorial Scholarship

**Tyler Kramer**

- Southwestern High School
- Keith Brooks Memorial Scholarship

**David Kummer**

- Christian Academy of Madison
- Community Foundation Scholar Award

**Emma Lostutter**

- Madison Consolidated High School
- MCHS Class of 1966 Scholarship

**Grace Marshall**

- Madison Consolidated High School
- Jefferson County 4-H Scholarship

**Laney Marshall**

- Southwestern High School
- Ralph and Robyn Jones Family Memorial Scholarship

**Alex Mason**

- Madison Consolidated High School
- Chan Chilton Memorial Scholarship

**Alexandria Nay**

- Madison Consolidated High School
- Curtis Wright Memorial Scholarship

**MacKenzie Phillips**

- Madison Consolidated High School
- Sharon T. Alcorn Memorial Scholarship
  - Calvin Family Scholarship
  - Dupont Alumni Scholarship
  - Mabel Green Memorial Scholarship
  - Glenn G. and Dorothy Ebel Huntington Memorial Scholarship

**Abigail Ralston**

- Southwestern High School
- Christie Crafton Memorial Scholarship
  - Marcia S. Morrill Memorial Scholarship of the Madison Rotary Club
  - Mary Elizabeth Patterson Scholarship

**Devin Russell**

- Shawe Memorial High School
- Broadway School Alumni Scholarship
  - CAM Car Club Scholarship
  - Jefferson County 4-H Scholarship

**Mary Schroeder**

- Southwestern High School
- Lisa Cheatham Memorial Scholarship
  - Dale McNeely Scholarship

**Harper Smith**

- Madison Consolidated High School
- Community Foundation Scholar Award
  - Dorothy B. Lotz Scholarship

**Grace Stewart**

- Shawe Memorial High School
- Father Hilary G. Meny Scholarship

**Tristan Storie**

- Madison Consolidated High School
- Charles H. and C. Chris Keller Scholarship

**Aaron Watson**

- Southwestern High School
- Bill Oldaker Scholarship of the Madison Rotary Club

**Kasey Watterson**

- Southwestern High School
- J. Michael Sample Memorial Scholarship for Music



**2019 Lilly Endowment Community Scholarship Finalists**

David Kummer, Makayla Christian, Grace Brautigam, Sophia Hall, Harper Smith. Not Pictured: Bailey Dyer

Photo Courtesy of Janie Mahoney Photography



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Julie Wells

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| Jim Braun        | Julia Johnson    | Susie Robbins      |               |
| Launa Braun      | Ashley Kress     | Fernando Rubio     |               |
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William H. Hensler (2001-2007)	Steve Telfer (2013-2018)
Robert D. Hoban (1991-1998)	Barbara Trimble (1991-1995)
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Curt Jacobs (1998-2004)	Josh Wilber (2016-2018)
Jane W. Jacobs (1991-1998)	Roger Williams (2008-2010)
Jane Jakoubek (2004-2006)	Mark Wynn (2006-2011)
Kris W. Kindelsperger (1991-1998)	

**JULIE WELLS**  
**PROGRAM ASSOCIATE**

Julie joined the staff of the Community Foundation in November 2019 following a 35-year career as a high school English teacher. At the Community Foundation, she will serve as a part-time Program Associate. Her responsibilities include overseeing the CFMJC Scholarships and Lilly Endowment Community Scholar processes and assisting with the Women's Giving Circle.

Since the mid- '90s, Julie taught at Scottsburg High School, developing the American Studies course for college bound juniors, and instructing Dual Credit Composition classes through Vincennes University. She earned a BA from Hanover College, and MS and Secondary Administration certification from Indiana University Southeast.

She recently moved to Madison with her husband Brady, who serves as the Cross Country coach at Hanover College. They are the parents of two adult children. Julie enjoys reading, running, doing genealogy research, and spending time with her granddaughter.



## CONSOLIDATED STATEMENTS OF FINANCIAL POSITION

### ASSETS

	2019	2018 as restated
Cash and cash equivalents	\$ 772,826	\$ 819,958
Investments	27,289,350	22,701,887
Other assets	2,013	2,013
Property and equipment, net	253,135	260,585
	<u>\$ 28,317,324</u>	<u>\$ 25,094,448</u>

### LIABILITIES AND NET ASSETS

	2019	2018
<b>Liabilities</b>		
Accounts payable	\$8,967	\$9,098
Grants Payable	19,000	-
Charitable gift annuities	17,812	18,695
Custodial funds	916,860	718,860
Total liabilities	<u>962,639</u>	<u>746,653</u>
<b>Net Assets</b>		
Without donor restrictions		
Operating	414,319	414,319
Board Designated	158,063	158,063
Total without donor restrictions	<u>572,382</u>	<u>572,382</u>
With donor restrictions		
Restricted for specified purpose	440,690	401,425
Restricted in perpetuity - endowment	18,688,672	18,688,672
Restricted subject to the Organization's spending policy	6,833,978	3,375,311
Total with donor restrictions	<u>26,733,958</u>	<u>22,465,408</u>
Total net assets	<u>27,354,685</u>	<u>23,037,790</u>
	<u>\$28,317,324</u>	<u>\$23,784,443</u>

## FUNDS

### Fund Balance

#### Endowment Funds by Type:

Donor Advised	\$ 5,017,889
Acorn	500
Designated	8,128,347
Field of Interest	80,620
Scholarships	4,229,495
Board Advised	8,454,085
Agency	703,228
	<u>\$ 27,314,168</u>

## GRANTS

### Grant Amt # Avg. Grant Amt

#### Grants by Fund Type:

Donor Advised	\$ 154,400.00	103	\$ 1,499.03
Acorn	-	-	-
Designated	302,100.00	79	3,824.05
Field of Interest	34,434.00	21	1,639.71
Scholarships	141,925.86	64	2,217.59
Board Advised	251,512.00	73	3,445.37
Agency	10,200.00	10	1,020.00
	<u>\$ 894,571.86</u>	<u>350</u>	<u>\$ 2,555.92</u>

## CONSOLIDATED STATEMENT OF ACTIVITIES

### Support, revenues and other

	2019			2018 as restated
	Without Donor Restrictions	With Donor Restrictions	Total	Total
Contributions	\$692	\$963,769	\$964,461	\$1,758,236
Change in value of charitable gift annuities	-	(1,862)	(1,862)	34,579
Investment return, net	64,004	4,519,086	4,583,090	(1,952,158)
Management fees	317,072	-	317,072	306,558
Other revenues	12,121	-	12,121	12,000
Net assets released from restrictions	1,212,443	(1,212,443)	-	-
Total support, revenues and other	\$1,606,332	\$4,268,550	\$5,874,882	\$159,215

### Expenses

Program services	1,286,681	-	1,286,681	1,295,440
Management & general	162,087	-	162,087	137,516
Fundraising & development	109,219	-	109,219	97,596
Total expenses	<u>1,557,987</u>	<u>-</u>	<u>1,557,987</u>	<u>1,530,552</u>
Change in net assets	48,345	4,268,550	4,316,895	(1,371,337)
<b>Net assets, beginning of year</b>	<u>572,382</u>	<u>22,465,408</u>	<u>23,037,790</u>	<u>24,409,127</u>
<b>Net assets, end of year</b>	<u>\$620,727</u>	<u>\$26,733,958</u>	<u>\$27,354,685</u>	<u>\$23,037,790</u>









COMMUNITY  
FOUNDATION  
JEFFERSON COUNTY

P.O. Box 306  
Madison, IN 47250-0306

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The Community Foundation of Madison and Jefferson County is pleased to provide this annual report as part of our commitment to honoring philanthropy. You will find within these pages the names of donors who are impacting our community through their generous gifts. You will see how the Foundation supports projects that improve the quality of life in Jefferson County. You will find names of friends and neighbors who have been memorialized or honored by meaningful gifts. You will meet students attending college with help from our scholarships. And you will find financial information as we strive to provide transparency in the stewardship of our gifts. We hope you enjoy reading this report, and we invite you to share it with friends and family after you have read it.

**Community Foundation  
of Madison & Jefferson County**

P.O. Box 306  
416 West St., Suite B  
Madison, IN 47250-0306

812-265-3327  
Fax: 812-273-0181

info@cfmjc.org



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