



ANNUAL  
REPORT  
2021



1991

Founded on April 29, 1991 through the \$500,000 GIFT (Giving Indiana Funds for Tomorrow) challenge from Lilly Endowment Inc. (LEI)



COMMUNITY  
FOUNDATION  
JEFFERSON COUNTY  
GIVE • GROW • GRANT

Dear Friends,

2021 was a great year for your Community Foundation! As we celebrated our 30th anniversary year, we reflected on past volunteers, donors, and the work of local nonprofit agencies that your philanthropy has funded (pages 4-5). It was wonderful to take a stroll down memory lane, but to also look forward to the great future that we have ahead of us as an organization.

When a group of community-minded people established our organization in 1991, they were presenting a concept of giving that was very new to most people in Jefferson County. Thirty years later, we certainly can see the power of the endowment model. A great example of that power is an endowment named the King's Daughters' Hospital/William G. Crosby Fund for Pediatrics.

This endowment was established in December 1992 by the Board of Directors at King's Daughters' Hospital, now known as Norton King's Daughters' Health (KDH), using a portion of the estate of William G. Crosby. The fund's purpose is to provide financial support to the Pediatrics Department, forever. In a Madison Courier story from December 22, 1992, then Hospital Board Chairwoman Brenda Eversole said, "We believe it is very important and prudent management, to set aside a portion of our legacy for the future. A part will be spent currently for equipment and other needs, but the \$50,000 will provide an annual income to the department forever. The Community Foundation's investment policy provides for the principal to grow with inflation so that the purchasing power of the income can be maintained over the years."

Since it was established with a \$50,000 donation, nearly \$75,000 in annual grants has been distributed to the KDH Pediatrics Department and the original \$50,000 of principal has grown to a current market value of over \$107,000. Mr. Crosby's name will forever be a part of the community and his legacy will support the work of the KDH Pediatrics Department for many generations.

When you choose to give to the Community Foundation, whether it is to establish your own fund (pages 8-13) or give to one of our existing funds (pages 14-17), you are helping us build FOREVER for Jefferson County.

In 2021, we still were cautiously waiting for the COVID-19 pandemic to end and did not hold any in-person events, but we were excited to award over \$400,000 in competitive grants and scholarships (pages 27-31).

Thank you to everyone who has supported our community through the foundation over the past 30 years. You are all a part of our history, our story, and our Community Foundation family. You are all a part of our 30 amazing years.

Sincerely,

Lynn Maricle  
Board Chair

Bill Barnes  
President & CEO

2003

Created the Legacy Society to recognize donors who have made planned gifts to the Community Foundation.

2010

Awarded a \$150,000 grant to the Clearinghouse of Jefferson County to combat generational poverty, the largest grant to date awarded by CFMJJC.

2012

The Women's Giving Circle of Jefferson County was created and awarded its first grants totaling \$15,450.

2014

Awarded a \$100,000 grant to the KDH Foundation for the Hope & Healing Campaign for the cancer treatment center.

2020

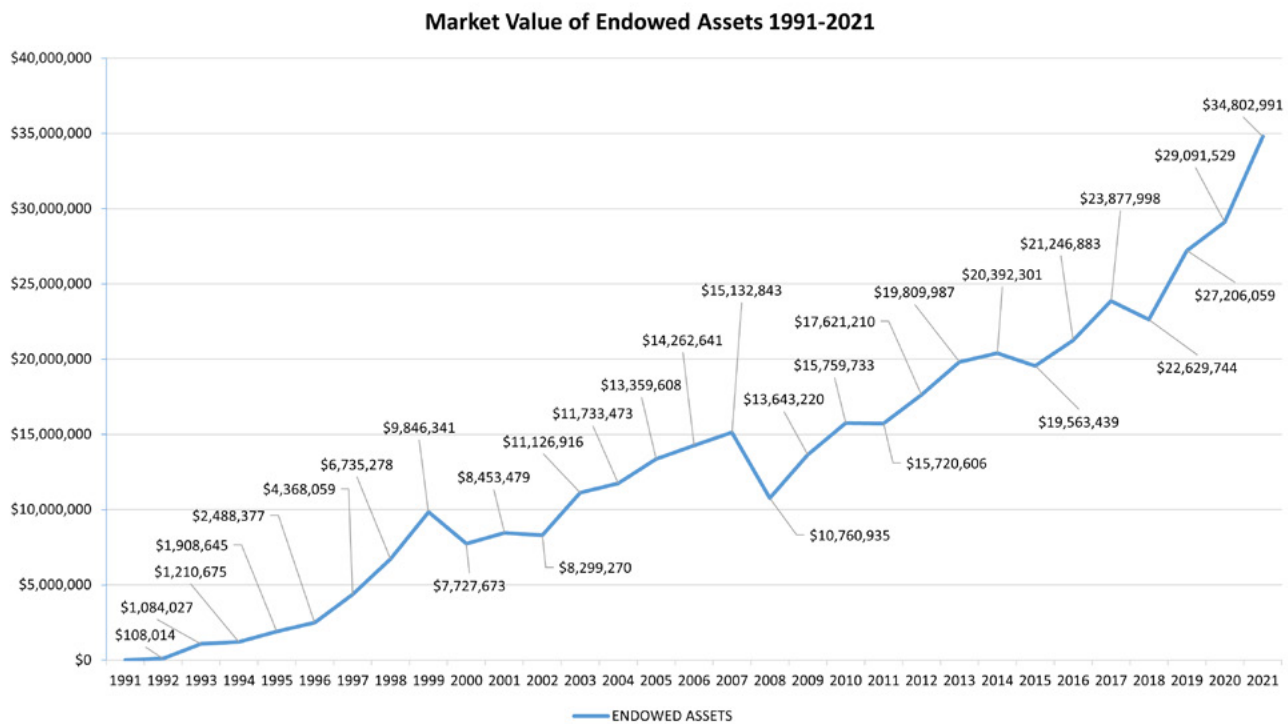
Awarded \$75,875 to 20 organizations through the COVID-19 Rapid Response Grant Program.



# 30 AMAZING YEARS IN JEFFERSON COUNTY

Thirty years ago, a small group of volunteers gathered to meet a challenge and to dream about Jefferson County’s future. That small group’s vision was to create an organization that would provide support to nonprofit organizations serving the residents of the community. That organization is now known as the Community Foundation of Madison and Jefferson County (CFMJC).

What began in 1991 with a \$500,000 matching grant from Lilly Endowment Inc.’s GIFT (Giving Indiana Funds for Tomorrow) initiative has grown to exceed \$34 million in assets. Of course, in that 30-year span of time, the county, state, country, and world have seen ups and downs; but through it all, the Community Foundation has remained a constant.



Having the word “community” in the organization’s name is key to describing the nature of its existence. As a 501(c)3 public charity, the Foundation is supported by donations from community members. Nearly 66% of all donations made in 2021 were \$100 and less, demonstrating that residents of all financial means can make a difference in the county in which they live, work, and play.

After receiving that support and growing those gifts through prudent stewardship, CFMJC makes grants each year to support a wide variety of needs in the community. Many may be familiar with some of the Foundation’s larger grants, such as providing \$100,000 to support the creation of the Cancer Treatment Center at Norton King’s Daughters’ Health and granting \$150,000 to River Valley Resources for the creation of the Clearinghouse of Jefferson County. But throughout the last 30 years, the Foundation has supported youth activities and organizations, health and safety initiatives, historic preservation projects, and the creation of parks, just to name a few.

But collecting money from and granting money to the community is not the only way the Foundation connects to Jefferson County. The Community Foundation is seen as a community leader, with the input of the CFMJC staff members and Board of Directors often being sought during the planning and implementation phases of community projects, most recently including the Stellar Community designation and the creation of Resilient Jefferson County.

It is exciting to dream about what Jefferson County will be like in the next 30 years. Whatever the future may look like, the Community Foundation will still be here to provide support to the ever-changing needs of the residents of Jefferson County – For Good. Forever.

## Permanent Planting of Art

A bright and shiny object caught her eye on the way to her dance class. She wanted to take a closer look, but her mom kept going. She stopped in her tracks and pulled back on her mom’s hand, trying to lead her a few steps back. “Mom! Look at this!” The duo took a moment to look at the shining sculpture sitting in the small courtyard between the Community Foundation office and the 420 West apartment building.

*Spring Awakening*, created by metal sculptor and fabricator Dale Rogers, adds a pop of color and shine among the courtyard landscaped by River City Nursery. “I first met Dale and saw examples of his work at the 2018 Madison Chautauqua Festival of Art,” said CFMJC President & CEO Bill Barnes. “I love birds and trees and thought that this sculpture would be perfect for the landscaped space north of our building.” The eight-and-a-half-foot tall sculpture is comprised of Cor-Ten Steel for the base and branches, stainless steel for the top, and steel for the three multi-color birds. These materials are made to sustain the sculpture’s appearance over time and through the elements. This piece of public artwork sits almost directly across the street from the sculpture *The Ties That Bind* by former CFMJC Board Member Eric Phagan featured in Lytle Park.

Just as a real tree can provide enjoyment and shade for generations, it is the Community Foundation’s hope that this tree will bring joy to those who look upon it for many years to come. That same joy that it provided for the tiny dancer, who even after practice, grabbed her mom’s hand and guided her to look at the sculpture one more time before heading to their vehicle.



TOP - Even on a snowy day, the colorful steel birds featured within the metal tree stand out, catch the viewer’s eye, and warm their heart even in the coldest temperatures.

MIDDLE - CFMJC President & CEO Bill Barnes shows his excitement and gets a closer look at the new sculpture during its installation in March 2021.

BOTTOM - *Spring Awakening* sculptor Dale Rogers (second from left) poses for a photo with CFMJC’s Bill Barnes (far left) and 420 West Apartments owners Valecia and Larry Crisafulli. The Crisafullis helped share the cost of the piece with CFMJC.





# TOGETHER MAKING A DIFFERENCE

The Community Foundation has been collaborating with donors since 1991 to fund the causes they care about most. We are here because generous people were willing to create endowments that others can donate to in order to make a difference in our county. Two endowment examples of community members coming together to donate and create a lasting impact on Jefferson County are the **Mike Hess Memorial Endowment** and the **Food for Students Fund**.

## Carrying On A Friend's Generosity

2021 marked the 10th anniversary of the creation of the **Mike Hess Memorial Endowment**. Mike was well-known in the Hanover area, as not only a member of Southwestern High School's Class of '84, but also as the owner/operator of Mike's Service Center. He was passionate about several hobbies and enjoyed giving charitably to help youth in need afford extracurricular activities at school. One of those activities that Mike often helped cover was Prom and the expenses around it. His friends shared that Mike could often be seen in local restaurants on Prom night paying for students' meals.

Mike sadly passed away in August 2011 after a battle with Cancer. A group of his friends came together and held benefit events to remember their friend and to raise money for the endowment. In their first year, they raised \$12,411, exceeding the minimum \$5,000 needed to make it a permanent fund. This has now become an annual tradition! To date, over \$74,000 has been raised and given to the fund. Following the benefit, Mike's family members and friends meet with Community Foundation President & CEO Bill Barnes to discuss how to distribute grants from the endowment and the extra money raised at the benefit. Over the past 10 years, \$12,640 has been granted to cover Prom and After-Prom event costs and student Prom expenses at Madison Consolidated and Southwestern High Schools, as well as the Dress a Student Closet at Southwestern.

It's hard to estimate just how many people have donated to the **Mike Hess Memorial Endowment** because, many times, the donations are made at the benefits with cash. But what we do know is that these folks have and will continue to make an impact on the lives of students in our county. That has been the most important thing to Mike's friends, knowing that what they've started by collecting various dollar amounts of donations from many people will last forever and be a self-sustaining legacy at the Community Foundation.



Mike Hess

TO DATE, OVER  
**\$74,000**  
HAS BEEN RAISED



A screenshot of Elijah Chandler's initial Instagram post announcing the Food for Students Fund.

*"You don't have to have thousands of dollars to start a fund, just a community of people willing to support a common goal and give to what they care about."*

## Strength In Numbers, Near And Far

It seems that there are now endless ways to connect and communicate with those around us near and far. Social media platforms like Instagram and Facebook are avenues that individuals and organizations use to get the word out about important milestones. Elijah Chandler harnessed the power of Instagram to reach out to friends and family across the country to let them know about the **Food for Students Fund** he was starting as an Acorn Fund in February 2021. His vision for the fund was to help alleviate student lunch debt in Jefferson County's public schools. (Read more about Eli and the creation of this fund on page 8).

By posting short, one-minute videos, he told his followers how they could help, and he posted updates on the fund's progress in reaching the establishing minimum dollar amount. In just six weeks, Eli and his friends, family, and followers gave enough to reach the \$5,000 needed to become a Designated Endowment.

Overwhelmed by and grateful for this outpouring of support, Eli wanted to keep the momentum going and to provide immediate relief to the schools. He rallied his followers once again to donate in the summer before school started. Over \$1,000 was granted to the public schools to help with outstanding student lunch debt.

In December, Eli partnered with the Red Roaster Coffee and Eatery to help with their annual Sock Drive for the Salvation Army. For each \$10 donated to the **Food for Students Fund**, Eli donated a pair of new socks. In total, 418 pairs of socks were donated by Eli and others in the community, with \$955 being raised for the endowment. Throughout last year, the majority of the donations to the Food for Students Fund were made via credit card through the Foundation's online giving portal. A few donors are currently taking advantage of the monthly recurring donation option available on the site.



2021 Red Roaster Sock Drive.

Though they were established 10 years apart, the **Mike Hess Memorial Endowment** and the **Food for Students Fund** show how you don't have to have thousands of dollars to start a fund, just a community of people willing to support a common goal and give to what they care about.



# NEW FUNDS

In 2021, 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.

## Designated Funds

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.

### Food For Students Fund

Elijah Chandler established this Designated Endowment as a great way to give back to the community that has been so good to him throughout his life. A graduate of Madison Consolidated High School, Eli wanted to be able to help the public schools in Jefferson County so the students, and their parents, can be as successful as possible. He has a passion for food, and one of his greatest joys in life is cooking with his daughter. Food insecurity is a growing problem in our region, and studies show that students perform better with proper nutrition. Annual grants from this fund will help public schools in Jefferson County assist students and families with lunch expenses.



### Ohio Theatre Endowment

The historic Ohio Theatre is a valued piece of Madison's Main Street district. The Ohio has been here for decades of first dates and kiddie cartoons, and Jarrett Boyd hopes it will continue to be an anchor for downtown Madison. With that in mind, she established this Designated Fund because she sees the theatre's value not only for the "picture shows," but as a venue for local theatrical groups, speakers, or musicians. Imagine the possibility of an annual film festival! Jarrett has a warm place in her heart for the small-town movie due to earning spending money working the concession stand (like the one at the Ohio) during her junior year of high school. Annual grants from this fund will be made to the Friends of the Ohio Theatre organization to support the Ohio Theatre for years to come.

## Donor Advised Funds

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.

### Rob and Michele Barlow Charitable Endowment

This Donor Advised Fund was established by Rob and Michele Barlow. As long-time residents of Madison and Jefferson County, Rob and Michele have given back to many community and nonprofit organizations, local schools, and service clubs, either financially or through their volunteer efforts. Each year, the Barlows will designate grants from this fund to the causes and organizations they care about the most.



### Bill Demaree Memorial Endowment

Julie Demaree and Kiran Somashekara created this Donor Advised Fund to remember Julie's father, the late Bill Demaree. Bill was a lifelong Madisonian who enjoyed serving his family, friends, and community. For over 50 years, he was the owner of Bill Demaree Realty, and had served on the Madison City Council for nine years. Through this fund, Julie, Kiran, and their family will select the charities to benefit from the fund's annual grants, giving them maximum flexibility with their philanthropy and honoring Bill's legacy.



Joseph T. and Ruby W. Craig Fund for Learning

This Donor Advised Fund was created to honor Joseph and Ruby Craig by their daughters Nancy Jacobs, and her husband Curt, Martha Clancy, and her husband Jack, and Margaret Hillery. Joe and Ruby recognized the importance of learning, and as teachers, they helped educate thousands of Jefferson County children. Growing up in Jefferson and Scott Counties, they learned skills from their parents that proved invaluable in supporting their families, neighbors, and communities. From gardening to plumbing, food preservation to ham radio, and sewing to small machine repair, Joe and Ruby were always prepared and willing to lend their help. More importantly, they were always willing to take the time to help others learn a needed skill so that in the future, they would be prepared to help themselves and those around them. To continue this legacy, the family will annually select the organizations and projects to benefit from the fund’s grant dollars, with an emphasis on supporting learning opportunities.



Schafer Family Philanthropy Fund

Many generations of the Schafer family have been fortunate to call Jefferson County home. Over the years, they have come together as a family to support many organizations and programs benefitting area residents. To make sure that this legacy of giving back to the community continues, members of the Schafer family have established this Donor Advised Fund. Each year, the family will select the causes that will benefit from the fund’s grants.



Doug and JoAnne Spiller Family Endowment

This Donor Advised Fund was established by Doug and JoAnne Spiller. The Spillers created this endowment as a way to give to the causes their family cares about for many years to come. They have volunteered for various organizations and support the important work they do in our community. Each year, Doug and JoAnne will designate which charitable organizations will benefit from the fund’s annual grants.

Tony and Hilary Steinhardt III Community Fund

The Steinhardt family has a long history of community service to Madison. Tony and Hilary Steinhardt III continue the family tradition by establishing a Donor Advised Fund to make a lasting impact on the quality of life in Madison. Each year, Tony and Hilary will select organizations with broad community impact to benefit from the fund’s grants, giving them maximum flexibility in their philanthropy.



“...a long history of community service to Madison... making a lasting impact...”

Field of Interest Funds

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.

World Languages and International Studies Endowment

It is easier than ever to connect with others around the world through the avenues of education, travel, and business, to name a few. Pam Alsop Sandoz cherishes the memories she’s made throughout her career in the global financial and international trade sectors, but also in her time as a French teacher, student, and tourist. With that in mind, she established this Field of Interest Fund to support experiences and/or training that helps Jefferson County students, teachers, individuals, and/or organizations gain expertise and proficiency in foreign languages, English as a second language, and/or international studies.





# Flexible Community Funds

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.



## Tim and Kim Breeding Family Endowment

This Flexible Community Fund was established by Tim and Kim Breeding. Tim and Kim have financially supported many community organizations over the years, personally and through their businesses, Teton Corporation and M&M. They have also volunteered at the Community Foundation for many years, including Tim's service as Board Chair in 2010, and Kim participating in the Women's Giving Circle. Annual grants from this fund will be utilized during the Foundation's competitive grants cycle to address the current needs of Jefferson County.

## Kevin and Mary Kay McCubbin Endowment

The McCubbin family has been giving back to the Madison community for several generations. As president of McCubbin Motors, Kevin has supported many charities and organizations over the years and has served on the Board of the Salvation Army. Mary Kay has been involved in our Catholic Schools as former president of the Friends of Shawe and Pope John. She has been involved in the community, serving currently as a member of the Board of Directors for King's Daughters' and Tri-Chair for the KDH Cancer Center Fundraising Campaign in 2015. Her most recent volunteer efforts led to the formation and creation of the Madison Sport Court, a public multi-sport Center completed in 2020. To honor and continue that legacy, Kevin and Mary Kay McCubbin established this Flexible Community Fund. Annual grants from this fund will be used to address the immediate and ever-changing needs of nonprofit organizations in Jefferson County.



# Agency Funds

In addition to the funds mentioned previous, we also offer Agency 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.



# Scholarship Funds

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

## Cheatham Family Scholarship

Robert and Mildred Cheatham were lifelong Madisonians who loved their community and raised their family here. Their sons, Gene, Buck, Tuck, Bardo, and Larry, along with their daughters, Thelma Wehner, Dot Sands, and Nancy Lee, were lifelong citizens who made significant contributions to our fair city. To honor their legacy, the family created a scholarship fund to be awarded to a Madison Consolidated High School senior wishing to further their studies at a post-secondary institution.



## Ralph and Margaret Seifert Madison Rotary Club Scholarship

The Madison Rotary Club established this Scholarship Fund in memory of long-time Rotarians Ralph and Margaret Seifert. Ralph and Margaret had a love for service and education, with Ralph serving as a professor at Hanover College for over 35 years, and Margaret serving in multiple roles at Hanover College and Ivy Tech Community College. To honor their memory, this scholarship will be awarded to a Jefferson County student intending to further their education at an institution of higher learning.





# 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 (animal welfare) (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)
- Ohio Theatre Endowment (2021)
- Neida Rogers Memorial Endowment for Music (2008)

## COMMUNITY CONSERVATION & PRESERVATION

- 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)
- Marty and Bea Ferguson Endowment (Prince of Peace Catholic Schools) (2008)
- Food for Students Fund (2021)
- 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)
- Lou Knoble Gift of Art Fund (MCHS Fine Arts Academy) (2020)
- 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)
- Deborah Lynn Taylor Memorial Endowment Fund (1999)
- World Languages and International Studies Endowment (2021)
- Betty S. Wynn Memorial Fund (Business Teacher Professional Development at MCHS) (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)
- Patty Cooper Memorial Endowment for Hanover United Methodist Church (2016)
- First Christian Church Endowment (2015)
- Hanover Presbyterian Church Fund (1995)
- Hanover United Methodist Church Endowment Fund (1997)
- Hanover United Methodist Church Food Pantry Fund in Memory of Marie Steir (2020)

- 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)
- Indiana Veterans Memorial Cemetery Endowment (2019)
- 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 Development Fund (1996)
- Jefferson County 4-H Horse & Pony Program Fund in Memory of Helen Kreeger (2017)
- 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. Hoeffling Fund (First Christian Church, Jefferson County Historical Society, Pilot Club, and Retired & Senior Volunteer Program) (2001)
- Larry and Charmaine Owens Endowment (Girls Inc., Jefferson Co. Public Library, and Trinity United Methodist Church) (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

- Rob and Michele Barlow Charitable Endowment (2021)
- 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)
- Joseph T. and Ruby W. Craig Fund for Learning (2021)
- Cronen/Marsiglio Family Endowment Fund (1997)
- Bill Demaree Memorial Endowment (2021)
- Dorsey Family Endowment (2019)
- Bob and Brenda Eversole Endowment (2011)
- Josh and Barb Ford Family Fund in Memory of Kenneth Stier (2017)
- 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)



- Chuck, Bonnie, and Brok Hensler Endowment (2002)
- Howard and Mary Muncie Hensler Memorial Fund (2017)
- Mike Hess Memorial Endowment (2012)
- Hubbard Family Endowment (2018)
- Al and Connie Huntington Family Community Fund (2014)
- 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)
- Karen S. Modisett Endowment (2021)
- Morgan Family Advised Fund (1996)
- Mickie Nethery Memorial Endowment (2007)
- Dr. John W. Petscher Memorial Endowment (2012)
- Fernando and Julie Rubio Charitable Endowment (2018)
- Schafer Family Philanthropy Fund (2021)
- Jason and Marlana Schafer Family Charitable Fund (2019)
- Skiles Family Endowment Fund (1997)
- Doug and JoAnne Spiller Family Endowment (2021)
- Tony and Hilary Steinhardt III Community Fund (2021)
- 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)

#### FLEXIBLE COMMUNITY FUNDS

- 7 Hugs: The David E., Sally Kirk, JD, and Stephanie Webster Family Endowment (2018)
- Bill and Stacy Barnes Charitable Endowment (2018)

- Eleanor T. Birk Foundation Community Fund (2018)
- Tim and Kim Breeding Family Endowment (2021)
- 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 Grahm Endowment (2002)
- Walter A. and Jean Graham Greiner Memorial Fund (1994)
- 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)
- Kevin and Mary Kay McCubbin Endowment (2021)
- 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)
- Devon and Rachel Sharpe Endowment
- Sherman, Barber, & Mullikin Fund for Jefferson County (2018)
- Norbert A. "Tony" Steinhardt, Jr. 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)
- Vonderheide Family Community Appreciation Fund (2020)
- George Wagoner, MD and Marjorie Jefferies Wagoner, MD Fund (2001)

- Robert E. Wall, DDS Fund (1993)
- Don R. Wallis Memorial Fund (1992)

#### 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)
- Cheatham Family Scholarship (2021)
- 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)
- Custer Oratory Contest Scholarship Endowment (2018)
- Deputy Alumni Scholarship (1997)
- Kenneth E. and Mary Lou Dunbar Scholarship to Honor Perry & Dunbar Drugstore Employees (2020)
- Dupont Alumni Scholarship (2000)
- Frances K. Eisan Memorial Scholarship (2013)
- Mabel C. 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 (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)
- Larry and Charmaine Owens Madison Rotary Club Scholarship (2008)
- Mary Elizabeth 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)
- Ralph and Margaret Seifert Madison Rotary Club Scholarship (2021)
- 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)

- Mayor Damon Welch Memorial Scholarship (2020)
- Nathan Wilson Memorial Mathematics Scholarship (1998)

- The Wood Memorial Scholarship (1995)
- Curtis Wright Memorial Scholarship (1999)

#### 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)
- Devon and Rachel Sharpe Charitable Fund (2020)
- David and Sally Webster Community Fund (2021)





# LEADERSHIP JEFFERSON COUNTY

Established in 2017, Leadership Jefferson County (LJC) is a bi-weekly, 10 session course comprised of topics to give participants a better understanding of resources and relationships in Jefferson County. The program was created as an action project of the “Building a Positive Community Through Collaboration & Leadership” initiative of the *Envision Jefferson County* project. That initiative was one of six created through community conversations and surveys hosted by the Envision team. Topics covered by the course include:

**Business & Economics • Education • Government Agencies & Organizations • Healthcare  
History • Industry & Agriculture • Nonprofits & Volunteerism • Social Services • Tourism**

Each year, the Community Foundation hosts the Nonprofits & Volunteerism session. CFMJC President & CEO Bill Barnes walks participants through an overview of what it means to be a 501(c)3 charitable organization and highlights healthy governance practices. Two local nonprofit organizations, the Jefferson County United Way and the Friends of Hargan-Matthews Park, visit the class to share more about their missions and programs.

Graduates of LJC have enjoyed their experiences and the knowledge they have gained about the community. Inaugural 2018 Class graduate Chris Mattern said, “Leadership Jefferson County was nothing short of life changing. I came into the program wanting to learn how to be more involved in the community and I left not only involved, but motivated to be a part of positive change and growth in Jefferson County.” 2019 Class graduate Josh Hershberger echoed Chris’ sentiments by saying, “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 Leadership Jefferson County course was placed on hiatus from mid-March 2020 through the entirety of 2021 due to the COVID-19 pandemic. Fortunately, the course has begun again for 2022. Members of the 2020 class have been invited to complete the course by attending the classes that were canceled for them because of the pandemic. LJC greatly appreciates Grote Industries, LLC and their continued sponsorship of our end-of-course celebration and luncheon in May.

The future looks bright as the LJC graduates and current participants continue to be examples of engaged and connected community members of Jefferson County.



*“Participating in Leadership Jefferson County 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. I’m seeing this town through new eye and have gained the motivation and confidence to begin to step outside of my comfort zone and participate as a community member.”*

**—Joyce Flanagan, Class of 2019 Graduate**

#### Class of 2018 Graduates:

Brooke Canter – Indiana-Kentucky Electric Corporation  
David Harden – Hanover College  
Missy Holt – Norton King’s Daughters’ Health  
Cheryl Kersey – Kersey & Kersey Architects  
Erin Lawrence – River Valley Resources, Inc.  
Chris Mattern – Madison Precision Products  
Sue Melton – Centerstone  
Victoria Perry – Madison Main Street Program  
Brandi Poling – Lide White Boys & Girls Club  
Rosie Rohmann – WorkOne Southeast  
Melissa Shelton – German American Bank  
Doug Spiller – Vehicle Service Group  
Shannon Tilley – Ivy Tech Community College Madison  
Stephanie Withered – First Financial Bank

#### Class of 2019 Graduates:

Teresa Brawner – Brawner Farms  
Kaitlyn Campbell – Norton King’s Daughters’ Health  
Sheila Coffin – Jefferson County United Way  
Amber Finnegan – Jefferson County Court Services  
Joyce Flanagan – Hanover College  
Josh Hershberger – Hershberger Law Office  
Beth Lichlyter – SuperATV  
Angie Pelsor – First Financial Bank  
Cesar Perez-Bolivar – Grote Industries  
Jason Schafer – Indiana-Kentucky Electric Corporation  
Jeff Studebaker – Madison Consolidated School Corporation  
Laura Watson – Madison Precision Products  
Brad Wood – River Valley Resources, Inc.

#### Class of 2020 Participants:

Amy Arbuckle – Madison Precision Products  
Angela Burch – Industrial Supply Company  
Jennifer Duplaga – Hanover College  
Casey Goode – Madison Railroad  
Courtney Gullion-Althoff – Ivy Tech Community College - Madison  
Keith Howard – Healthy Communities Initiative of Jefferson County  
Jenn Mahoney – German American Bank  
Amy Nevils – Madison Precision Products  
Samantha Pierce – Habitat for Humanity Jefferson County  
Nicholas Schafer – Edward Jones Investments  
Julie Webster – Grote Industries

#### Class of 2022 Participants:

Susan Cline – First Financial Bank  
Jennifer Duncan – Norton King’s Daughters’ Health  
Haley Elgin – Fusion Now  
Brandy Ennulat-Shipp – Norton King’s Daughters’ Health  
Shannon Gatke – Indiana-Kentucky Electric Corporation  
Jonathan Louis – Edward Jones Investments  
Julie Patterson – Stay-at-Home Mom/Community Activist  
Greg Schneider – Ivy Tech Community College Madison  
Hannah Shaffer – VisitMadison, Inc.  
Austin Sims – Madison Main Street Program  
Jessica Spiess – Historic Madison, Inc.  
Kimberly Taylor – Friendship State Bank  
Sarah Wagner – Madison Precision Products  
Veronica Watson – Ohio Valley Opportunities, Inc.

# LEGACY SOCIETY

## 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 to publicly thank these donors during their lifetimes.

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.

### LEGACY SOCIETY MEMBERS

Dwight & Rita Addleman	Allen Manning
Bill & Stacy Barnes	Bill & Louise Markel
Tim & Kim Breeding	Gil & Trudy McCoy
Kate & Michael Brown	William & Edna Meyers
Bob & Charlotte Canida	Gerry Michl
Dean & Jana Clapham	Karen Modisett
Don & Peggy Clapham	Marcella Modisett
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Bob & Brenda Eversole	Harve & Joyce Rawson
George Freeman	Wendell & Debbie
Dick & Connie Goodman	Seaborne
Douglas & Ann Grahm	David & Betty Seabee
Meredith Gregg	Ralph & Margaret Seifert
Glenna Hanks Wade	Printis & Bonnie Shelton
John Hawk	Donald N. Smith
Bill & Jennifer Hensler	William Stephan
Kelley Hoagland	Steven Strandmark
Bob & Claudia Hoban	June Taylor
James & Sherrill Holt	William & Nancy
Al & Connie Huntington	Underwood
Jim Jackson & Alice	Henry Van Leeuwen
Carlson Jackson	Jan Vetrhus
Curt & Nancy Jacobs	Mary Goode Wallis
Kevin Kellems	Tony & Robin Waltz
Chris & Karol Kirk	David & Sally Webster
Fred & Judy Koehler	Suzanne Williams
	John & Maureen Wurtz

Leaving a legacy for your favorite charity after you are gone is easy and a great way to decrease the potential tax burden of your heirs. Here are the most common and tax-efficient planned gifts that you can note in your will/estate documents:

- Bequest – A designated amount or percentage noted in your will/estate documents
- Life Insurance – Name your favorite charity or the Community Foundation as a beneficiary
- Retirement & Investment Accounts – Naming the Community Foundation or your favorite charity as a beneficiary can be the most tax-efficient asset to gift at death
- Appreciated Stock – Avoid your heirs paying capital gains tax on the sale of stocks, bonds, and mutual funds
- Annuities & Trusts – Leave a percentage or specific amount to the Community Foundation or to the charities that you name as beneficiary

**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.**

## Planning Early To Leave A Gift Later

After having some of her family members suffer health setbacks, CFMJC Marketing & Donor Relations Manager Kelley Hoagland knew it was time to start thinking about her future, especially around what would happen when she is gone. “Death is never an easy topic to discuss,” said Kelley, “but it’s even more surreal to think about when you haven’t yet reached mid-life. It was a topic that my parents and I needed to discuss and put into writing.” When deciding what would happen to her assets at her passing, Kelley knew that the Community Foundation would be a beneficiary. In the past seven years that she has worked at the Foundation, Kelley has seen first-hand the kind of impact donations of any size can make, whether they are made in life or through an estate. “Including the Community Foundation in my will was an easy decision,” Kelley shared. “I want to give back to and support the great organization I work for and the future of Jefferson County.”





# WOMEN'S GIVING CIRCLE

## 10 Years of Empowering Women to Make a Difference

The Women's Giving Circle of Jefferson County (WGCJC) celebrated its 10th Anniversary in 2021! Formed in 2012 by 12 local women, the WGCJC is a community of philanthropic women of all ages and backgrounds. By combining their financial strength, these women collectively make a positive change for women and children throughout Jefferson County through the following goals:

- **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**

All women in Jefferson County are welcome and invited to join. Membership consists of an annual

tax-deductible contribution of \$100. Each membership has 75% placed in a pass-through field of interest fund, while the remaining 25% is invested in the Women's Giving Circle Endowment in Memory of Bonnie Hare permanent fund. Junior Memberships are available for young ladies ages 18 and under for \$50 and are split \$25/\$25. At the end of 2021, the WGCJC Endowment had a value of \$144,166. All assets of the WGCJC are held and maintained at the Community Foundation of Madison and Jefferson County.

## How We Give

The WGCJC makes grants annually to organizations that have the greatest potential to help the women and children of Jefferson County. 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 Prevention**

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 April. Since its creation, the WGCJC has granted \$184,699 to nonprofit organizations serving the women and children of Jefferson County.

## Cheers To 10 Years!

In the past 10 years, the WGCJC has reached other impressive stats including:

- **493 different women have been members of the WGCJC**
- **63 women have been members for all 10 years**
- **The highest number of members in a year is 274 in 2017**

It is clear that our local community of women has a deep love of helping those in need. Here's to 10 (and many more) years of the Women's Giving Circle of Jefferson County!

The Women's Giving Circle of Jefferson County finished 2021 with 205 members! From the membership dollars and extra donations collected, \$15,600 in grants were awarded to five nonprofit organizations that serve women and/or children in Jefferson County.

The 2021 WGC members were excited to attend the annual celebration event on April 5, 2022 at the Fairfield Inn - Madison. Members voted on accepting the grant recommendations at the event or online. The winning organizations and projects:



**Englishton Park Presbyterian Ministries, Inc.** - to replace the summer camp's kitchen countertops



**Jefferson County Transitional Services** - to replace the summer camp's kitchen countertops



**PFLAG** - to install flooring in the PFLAG Youth gathering space



**Southwestern Middle/High School** - to purchase social/emotional learning materials for the students



Representatives of the 2021 Women's Giving Circle Grant recipients gathered to receive their awards at the Community Foundation office on April 29, 2022.

Pictured are (from left): FRONT ROW: Women's Guiding Circle Member Kathy Crafton; Larry Truax, Englishton Park Presbyterian Ministries; Stephanie Brawner, Southwestern Middle/High School; Women's Guiding Circle Member & WGC Grants Chair Jane Williams; and Kim Taylor, Jefferson County Transitional Services/Ruth Haven. BACK ROW: Tom Lowry, Janet Huber Lowry and Tabitha Tolbert, PFLAG.

## FOUNDING WGCJC MEMBERS

Mary Kay Butler, Carri Dirksen, Cara Fox, Maribel Guillen, Bonnie Hare, Nancy Jacobs, Susan Ohlendorf, Margaret Seifert-Russell, Ashley Schutte, Nancy Sprunger, Sue Stack, and Donn Vecchie-Campbell

## WGCJC 10 YEAR MEMBERS

Tracy Ahlbrand, Stacy Barnes, Marta Belt, Julie Berry, Launa Braun, Martha Brown, Mary Kay Butler, Cheryl Campbell, Emma Campbell, Maggie Campbell, Charlotte Canida, Janet Castor, Darleen Connolly, Kathy Crafton, Brenda Cummins, Karen Dickie, Laurie Dorsey, Sylvia Duke, Barbara Ellefsen, Brenda Eversole, Patti Frazier, Lisa Gray, Glenna Hanks Wade, Lisa Hanson, Jennifer Hensler, Carol Hertz, Kelli Hertz, Laura Hodges, Janet Huber Lowry, Connie Huntington, Christina Jones, Karol Kirk, Shirley Kloefer, Judy Koehler, Mary Carol Lorton, Mary Kay McCubbin, Mary McCuskey, Cindy McKay, Michelle Mouser, Thelma Mullett, Anna Nelson, Susan Ohlendorf, Margo Olson, Binnie Phillips, Alanagh Pimlott, Ann Roahrig, Linda Roaks, Susie Robbins, Ann Roller, Katherine Rosenberg, Cynthia Smoots, Nancy Sprunger, Becky Staab, Sue Stack, Phyllis Steinhardt, Karen Todd, Priscilla Torline, Nancy Underwood, Marianne Ungru, Donn Vecchie-Campbell, Betsey Vonderheide, Linda Wenning, Jane Williams

# 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 or email [julie@cfmjc.org](mailto:julie@cfmjc.org) and ask Julie Wells for more information!**



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Gary and Janet Purlee  
Alice Rabin  
Starla Raley  
Merle and Sherry Rea  
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Kimberly Reese  
Judy Richardson  
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Patrick and Karen Ricketts  
Terry and Cheryl Ricketts  
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Ron and Linda Roaks  
Robert and Connie Robbins  
Susie Robbins  
Natalie Roberts  
Alice Rogers  
Ann Roller  
Kathy Rosenberg  
Victoria Rosenkranz  
Matt and Anna Rousch  
Greg Russell

Robyn Ryle  
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Jerry Schafer  
Jason and Marlana Schafer  
Nicholas and Kara Schafer  
Vicky Schirmer  
Susan Schmidt  
Tonya Schmidt  
Robert and Pamela Schoenstein  
Annie Schroeder  
John and Laura Schroer  
John and Ashley Schutte  
Ann and Greg Schwartz  
Susan Scott  
Myron Scruggs King and Linda Gurosky  
Larry and Tammy Sedam  
Ann Selby Goodman  
Flower Shaffstall  
Devon and Rachel Sharpe  
Deanna Shelley  
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Happy Smith  
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Brooke Snyder  
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Gena Stiver Stanek  
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Bill and Rosemary Sullivan  
Kate Sutter  
Nish Suvarnakar  
Martha Sweeney  
June Taylor  
Mandy Taylor and Ashton Furnish  
George and Karen Terlinden  
Sue Thomas  
Joe and Natalie Thornsberry  
Priscilla Thurnall  
Evren Tipi Akben  
Karen Todd  
Priscilla Torline  
Nancy Totten  
Patty Trimble



Robert Trimble  
Jeff and Kay Tull  
Nancy Underwood  
Marianne Ungru  
Sharon VandeWater  
Elizabeth Varble  
Donn Vecchie-Campbell  
Emma Vecchie-Campbell  
Maggie Vecchie-Campbell  
Betty Veit  
Jan Vetrhus  
Dan Vonderheide  
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Ray Voris  
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Virginia Welch  
Joyce Wells  
Julie Wells  
Brye and Meghan Welty  
Linda Wenning  
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Lauren Wheeler  
Sharyn Whitman  
Jill Wiest  
Carole Williams  
Jane Williams  
Larry and LeaAnn Williams  
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Pam Zehren

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Aurora Utilities  
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Beck's BT Seed Solutions  
Binzer's Custom Framing  
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BitWav  
Boneyard Grill  
Brawner Farms  
Bulk Truck and Transport  
Century 21 River Valley Real Estate

Chandler Chevrolet  
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Community Foundation of Switzerland Co.  
Craig Toyota  
Farm Bureau Insurance  
Farmer's Bank of Milton  
First Christian Church of Madison  
Friends of the Madison-Jefferson  
County Public Library  
Friendship State Bank  
Gardner Insurance Agency  
Gateway Investment Services  
Geneva Financial  
German American Bank  
Goode Trucking  
Hanover Traffic, LLC  
Jefferson County 4-H Club &  
Agricultural Association  
Jefferson County Genealogical Society  
Jefferson County Historical Society  
Jefferson County Humane Society  
Jefferson County Republican  
Central Committee  
JEHK, LLC  
Jendy's Pizzeria  
Jen Era Jeff Chapter #44 OES  
Jenner Law Office  
Koehler Welding Supply, Inc.  
Kroger Company  
L & N Machine  
Laymon & Hummel Insurance  
Leach Show Pigs  
Lisa's Hope Fund  
Lytle Welty Funeral Chapel  
M & H Valve Co.  
Madison Chemical Company  
Madison Consolidated School  
Corporation Education Foundation  
Madison Kiwanis Club  
Madison Land Title  
Madison Riverfront Development  
Corporation  
Madison Rotary Club  
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Madison Vineyards  
Madison Water Department  
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McKay Accounting Service  
The Moore Family Foundation,  
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Raise the Bar Tree Service  
Sherman, Barber, & Mullikin CPAs  
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Sparkman Pallet & Lumber  
SuperATV, LLC  
Teton Corporation  
United Way of Bartholomew County  
Wanda Jackson Sunshine Fund for  
Huntingtons Disease, Inc.  
YourCause Global Good Network

**TRUSTS & ESTATES**

Elbert Hinds Estate  
Anna and Charles O'Banion Trust  
Estate of Janis Petscher  
Watson Family Trust  
Estate of Vivian Whitson

**IN MEMORY OF:**

**Myrwin W. "Red" Anderson**  
Clay, Forest, and Carol Clevenger  
Kathy Osborne

**Betty Rose Benefiel**

Abby Benefiel

**Don Benefiel, Jr.**

Abby Benefiel  
Linda Benefiel

**Don Benefiel, Sr.**

Abby Benefiel

**Patrick Brawner**

Bill and Jennifer Hensler

**Abbey Brown**

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**Ltc. (Ret.) Gustaf Carlson**

Keith and Karen Howard

**Richard Avis Cart**

Elizabeth Auxier and Chuck Requet

**Nell Burnham Cayton**

Lonnie Mason

**Janice Chandler**

Lonnie Mason

**JoAnn Cheatham**

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David and Gayla Cheatham  
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Kevin and Carla Cheatham  
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**Bill Demaree**

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Michael Cloud  
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Bill and Rosemary Sullivan  
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Joe and Natalie Thornsberry  
Jan Vetrhus  
Ray Voris

**Rosemary Dirksen**

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Jim and Bonnie Colen  
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Larry and Tammy Sedam  
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Judy Elston and family

**Douglas and Ann Grah**

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**Robert "Bob" Kraft**

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Kathy, Lisa, and Nancy  
John and Marie Kraft  
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**Larry Lee**

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**Brayden Mahoney**

Kelly Miller

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**Donald McCauley**

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**Walt Morrill**

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Emily Briner  
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Susan Scott

**H. Irene Spicer**

Louis Spicer

**Morris Spicer**

Louis Spicer

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**SuEllen Voris**

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Bill and Dorothy Cassidy  
John Clark and Denise Coombs  
Jim and Bonnie Colen  
Donnie and Glenda Cox  
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Sherri Davis Morris  
Gloria Everidge  
Scott and Bernetta Flickner  
Jenner Law Office - Joe Jenner,  
Devon Sharpe and staff  
Shawn and Jessica Kietzman  
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Silver Creek Water Corporation  
Teton Corporation  
Jeff and Kay Tull  
James and Gloria Jean Voyles  
Larry and LeaAnn Williams

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Terry Callis  
Monty and Sharon Clevenger  
Mary Beth Cullens  
Andrew and Kendra Forrester  
Holly Lanae Fory  
Michell Gina  
Kelley Hoagland  
Tom and Tamma Kennedy  
Leigh Korengel  
Rodney Nay  
Charlie and Mary Pat Ricketts  
Kate Sutter  
Ginny Welch  
Virginia Welch

Brye and Meghan Welty  
Daryle Worley  
Natalie Worley

**Virginia Lou Welch**

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Sharon and Keith Elliot  
Wenda Feutz  
Jayme Larrison  
Chuck and Cindy McKay  
Marilyn McQueen  
David and Barbara Peddie  
Glen and Pamela Perkinson  
Matt and Anna Rousch  
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Glen and Vera Brown  
Tom Bruner  
Mark Cheatham  
Jack and Martha Clancy  
Lonnie and Judith Collins  
John and Darleen Connolly  
Don and Nancy Engle  
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Keith, and Pam  
Pete Ford  
Larry and Linda Francisco  
Todd Gettelfinger  
Bill and Jennifer Hensler  
Chris and Natalie Hill  
Wanda Horine  
Mark Humphrey and family  
Al and Connie Huntington  
Curt and Nancy Jacobs  
Jefferson County 4-H Club &  
Agricultural Association  
Jefferson County Republican  
Central Committee  
Jenner Law Office  
Kevin Kimmel and Donna Wilson  
Terry and Nancy Kirshman  
James Kleopfer  
Greg and Lori Leach  
Lisa's Hope Fund  
Madison Land Title  
Lonnie Mason  
Rick and Mindy McGee  
Lorna Naylor  
Dwight and Anna Nelson  
Chuck and Dawn Nunan  
Don and Yolanda Phillips  
Tony and Tina Povaleri  
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Carl and Gloria Risk  
Robert and Connie Robbins  
Robert and Pamela Schoenstein  
John and Ashley Schutte  
David and Judy Smith  
Priscilla Thurnall  
Betty Veit  
Josh Webb  
William and Anne Willis  
Tony and LeTiscia Wilson  
Donald and Susan Wynn  
Steve Wynn and family

**Ed and Libby Youngblood**  
Chuck and Bonnie Hensler

**IN HONOR OF:**

**Bill Barnes**  
Melissa Andrew  
Community Foundation of  
Switzerland County

**Eli Chandler**  
Kelley Hoagland

**Blythe Couch**  
Elijah Chandler

**Yvonne Davis**  
Panji Pope

**Jeannie Ecker**  
Mary Kraft

**Dee Gauger**  
Vicky Schirmer

**Kelley Hoagland**  
Elijah Chandler

**Zachary Laughlin**  
Kyleen Center

**Lillian Sue Livers**  
Elizabeth Chapa

Kathleen Haggerty  
Gail Karns  
Meg Perry  
Happy Smith  
Jessica Spiess

**Madison Tool Inc.**  
Paul and Cherri Cronen

**Larry and Charmaine Owens**  
Michael and Gwynn Perlich

**Elsie Perry-Payne**  
Jen Era Jeff Chapter #44 OES  
Vicky Schirmer

**Ivan Rimstidt**  
Bob and Claudia Hoban

**Andrew and Donna  
(McCauley) Schafer**  
Daniel and Judy Schafer  
Nicholas and Kara Schafer

**Southeastern Indiana Solid  
Waste District**  
Paul and Cherri Cronen

**Doug and JoAnne Spiller**  
Elijah Chandler  
Kelley Hoagland

**Steinhardt Heating and  
Cooling**  
Paul and Cherri Cronen

**Betsey Vonderheide**  
James and Mary Ann Boyd

**Arthur G. Wake and  
Robert H. Stewart families**  
Mona Harmon-Brown  
Mary Stewart-Pellegrini

# GRANTS

Since its creation in 1991, the Community Foundation of Madison and Jefferson County has invested over \$15 million back into Jefferson County through grants and scholarships. In 2021, the Community Foundation granted a total of \$884,421 from its endowments, with over \$248,000 of that total coming from Flexible Community Funds and Field of Interest Funds.

“Our grants committee is often asked for more than twice the amount that we have available to grant during our annual competitive grant cycle,” said CFMJC President & CEO Bill Barnes. “Thanks to donors who have entrusted grantmaking decisions to the Foundation through a Flexible Community Fund, we’re pleased to be able to make a significant impact and fund a diverse range of programs and projects that will benefit residents across all of Jefferson County.”

To be considered for funding through the annual Competitive Grant Cycle, local nonprofit agencies submitted an online application. Selected finalists were then emailed any additional questions from members of the Foundation’s Grants Committee to learn more about the organizations, their projects, and goals.

## Organizations that received 2021 competitive grant funding included:

**Big Brothers/Big Sisters of SE. IN. \$3,381**  
to provide computer equipment and training on the Matchforce software system

**Developmental Services, Inc. \$6,549**  
to support updates to the community home used by clients

**Friends of the Ohio Theatre, Inc. \$40,000**  
to support the creation of an architectural design and renderings for the renovation of the theatre

**Grace Works/Hope Community \$7,275**  
to support life enrichment activities to prevent depression and isolation in senior citizens

**Hanover College \$28,000**  
to support the Hanover-Madison Connector Trail project

**Hanover Town Council \$24,900**  
to support updates to Rainbow Park

**Historic Eleutherian College \$10,000**  
to support the pilot session of the Summer Institute for STEM teachers and students

**Ivy Tech Community College - Madison \$7,000**  
to support the Student Emergency Aid program

**Jefferson Co. Emergency Mgmt. Agency \$20,701**  
to purchase a sUAS drone for use by county emergency officials and first responders

**Jefferson County Historical Society \$4,500**  
to support computer and technology updates for the digital archives

**LifeTime Resources \$11,629**  
to provide matching funds to purchase a new Catch-A-Ride vehicle

**Madison Music Movement (M3) \$10,000**  
to support the “Indiana’s Music City” branding and marketing campaign

**Madison Performing Arts Foundation \$6,200**  
to support an upcoming string quartet concert

**Madison Police Department \$17,555**  
to purchase and train a new K-9 to join the department

**Salvation Army-Madison Citadel \$40,828**  
to purchase a new van to transport those in need of services from the organization

**Springdale Cemetery Association \$9,550**  
to support care and maintenance of the cemetery including the treatment of an historic elm tree

**The 2021 Competitive Grants Cycle awards were made possible by the following Community Foundation's Flexible Community Funds and Field of Interest Endowment Funds:**

- 7 Hugs: The David E., Sally Kirk, JD, and Stephanie Webster Family Endowment
- Gerald E. Amos Memorial Endowment Fund
- Bill & Stacy Barnes Charitable Endowment
- Eleanor T. Birk Foundation Community Fund
- Eleanor T. Birk Foundation Youth Fund
- Greg Cloud Memorial Endowment
- 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
- German American Bank Endowment
- The Douglas & Ann Grahn Endowment
- Walter A. & Jean Graham Greiner Memorial Fund
- Hanover Fund for Youth
- Jefferson County Enrichment Endowment
- Jenner Family 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" & Irene Ritter Memorial Endowment
- Neida Rogers Memorial Endowment for Music
- Margaret Francis Seifert & Gregory A. Russell Endowment
- Devon & Rachel Sharpe Endowment
- Sherman, Barber, & Mullikin Fund for Jefferson County
- Nancy J. Strandmark Memorial Fund
- Ann Suchocki & Jim Mason Family Fund
- Tribute and Memorial Fund
- Vehicle Service Group Employee Fund
- George Wagoner, MD & Marjorie Jefferies Wagoner, MD Fund
- Robert E. Wall DDS Fund
- Don R. Wallis Memorial Fund



## 2021 Competitive Grant Cycle Recipients



**Hanover Town Council** – Hanover Parks Director Scott Davidson, Hanover Clerk/Treasurer Keith Mefford, Hanover Parks Committee Chair Don Server, Hanover Town Council President Kenny Garrett



**Hanover College** – HC Chief of Staff Shelley Preocanin, Clifty Falls State Park Property Manager Brad Walker, Hanover Clerk/Treasurer Keith Mefford, Heritage Trail Conservancy Board member Jim Olson, and Hanover Town Council President Kenny Garrett



**Jefferson County Historical Society** – Executive Director John Nyberg



**Springdale Cemetery Assoc.** – President John Muesel



**City of Madison Police Department** – City Grant Manager Alyssa Foltz and Sr. Patrolman Seth Melton



**Friends of the Ohio Theatre** – President Elizabeth Auxier



**Historic Eleutherian College** – Board members Camille Fife and Emeka Koren



**Madison Music Movement** – President Todd Boone



**Madison Performing Arts Foundation** – President Starla Raley



**Graceworks Lutheran/ Hope Community Service** Coordinator Kayla Parker, Site Manager Amber Adams



**Developmental Services, Inc.** – REACH Program/ Communications Manager Mary McCall



**Salvation Army** – Captain Justin Hartley



**LifeTime Resources** – Catch-A-Ride Director Michelle Guidice



**Big Brothers/Big Sisters of Southeast Indiana** – Executive Dir. Gina Freeman

## Leveraging Local Dollars

In its 30-year history, the Community Foundation has been fortunate to provide lead grants that have helped organizations receive not only local support, but money from foundations outside of Jefferson County, as well as state and federal grants. When applying for those grants, showing that a project is supported by a community foundation can often raise the status of the application. Last year, CFMJC provided grants that are prime examples of two organizations leveraging local dollars. CFMJC asked Elizabeth Auxier with the Friends of the Ohio Theatre and Kay Stokes with the Hanover-Madison Connector Trail to share about how the Community Foundation has helped their respective projects move forward.

**CFMJC:** Briefly tell us about the project for which you received a 2021 Community Foundation grant.

**Elizabeth Auxier (EA):** This grant funded an interior architectural study, including conceptual drawings and detailed construction and design plans for the Ohio Theatre. It builds on the first grant we received in 2016 from the Foundation for a feasibility study.

**Kay Stokes (KS):** When it is completed, the Hanover-Madison Connector Trail (HMCT) will stretch six miles from the Town of Hanover and Hanover College to Clifty Falls State Park, the Heritage Trail and downtown Madison. It will travel down the hillside behind the college and then skirt the edge of the IKE Clifty Creek Power Plant property before paralleling SR 56/Clifty Hollow Drive. At the base of Hanover Beach Hill Road, the trail also will connect with CR 310W, allowing another 8 miles of scenic hiking and biking along the Ohio River.

**CFMJC:** How has receiving this grant and any previous grants from the Foundation helped your organization in your fundraising efforts for this project, especially state and/or federal dollars?

**EA:** The feasibility study was extremely helpful with securing additional dollars, especially because it was a lead gift that we used as matching dollars for additional grants from Indiana Landmarks and the National Trust. The grant and support of the foundation gave credibility to our project, in the beginning, and motivated others to donate, particularly Arvin Sango's contribution of \$75,000. The data obtained from the study is still used as we write grants. In addition, we received a \$250,000 grant from the Redevelopment Commission, using information from the study. This allowed us to repair masonry, install HV/AC and replace the roof. As a result, the Ohio Theatre is more structurally sound than it has been in decades. We secured a \$40,000 grant from the DNR Historical Preservation Fund, as a result of the foundation's most recent gift. Other grant requests are still pending.

**KS:** The Community Foundation's \$28,000 grant funded a scoping study by Schmidt Associates of Indianapolis, which developed a preliminary route and cost estimates. The scoping study formed the basis of an Indiana Next Level Trails (NLT) application for Phase 1 of the HMCT, which will run from the Heritage Trail and downtown Madison to Clifty Falls State Park. The study was absolutely essential. We could not have applied for the NLT grant without it. Thanks to the Community Foundation, we received a grant for \$2.16 million from NLT. We now will use the Next Level Trails funds to leverage approximately \$960,000 (as of press time) in additional funding from the Our Southern Indiana Regional Development Authority's READI grant initiative.

**CFMJC:** How will the completion of your project impact Jefferson County and its residents?

**EA:** The feasibility study was the first big step toward raising funds for repairs to the Ohio Theatre. It also gave us direction and a multi-year plan for rehabilitating and operating the Ohio Theatre. Every project we finish gets us closer to a complete renovation that will expand to the building to the west, better serving more community members and visitors. The architectural and design drawings will bring our vision to life and help show donors and the community what we plan to accomplish.

**KS:** The Our Southern Indiana Regional Development Authority is working to create a world-class greenway system that will connect the five-county region and the greater Louisville area. Madison and Hanover could become trail heads for a system that would allow residents and visitors to bike or hike all the way into Louisville along the Ohio River. A destination trail of this caliber would draw people from all over the world. What a great benefit for Jefferson County residents who could use the trail every day, as well as for business, tourism, and regional development.

**CFMJC:** The Community Foundation just celebrated its 30th Anniversary. What do you hope to see your organization/project accomplish in the next 30 years?

**EA:** Our hope is that future generations will continue to experience the joy brought by access to the arts. We will expand programming beyond movies and concerts. The Ohio Theatre will be the region's premier multi-use arts venue and will be known outside of the Midwest as a venue where national acts want to perform.

**KS:** Thirty years from now, I hope we have not only the Hanover-Madison Connector Trail, but also have a connection to a regional network of trails that lets us bike all over southern Indiana.



**Jefferson County Emergency Management Agency** – EMA Director Troy Morgan and Operations Chief Matt True



**Ivy Tech Community College** – Foundation Director Randy Lakeman and Career & Success Coach Nina Alcorn



**LEFT** - The Community Foundation was the star of the historic Ohio Theatre's marquee in late 2021. The Friends of the Ohio Theatre used this as one way to thank the Foundation for their most recent grant award and for the continued support. Pictured are (from left): CFMJC President & CEO Bill Barnes, CFMJC Board Chair Lynn Maricle, Friends of the Ohio Theatre President Elizabeth Auxier and her fellow Board Members Matt Marshall, Allison Ouellet, and Chad Lewis.

**RIGHT** - Hanover College students enjoy a sunset bike ride on campus. The Hanover-Madison Connector Trail will allow students, and other community members, to safely travel by bike or foot between the Town of Hanover and the City of Madison. (Photo courtesy of Hanover College/Kay Stokes)



# 2021 SCHOLARSHIPS

**Devin Banks**

Madison Consolidated  
Bill Oldaker Scholarship of the  
Madison Rotary Club

**Ethan Besse**

Southwestern  
Lisa Cheatham Memorial Scholarship  
George and June Miller Memorial  
Scholarship

**Sebastian Biallas**

Madison Consolidated  
Community Foundation Scholar Award  
Larry and Charmaine Owens  
Scholarship

**Aliza Boles**

Madison Consolidated  
Deputy Alumni Association

**Alivia Brawner** – Madison  
Consolidated

Jefferson County 4-H Scholarship

**Olivia Bruce**

Southwestern  
Jefferson County 4-H Scholarship

**Brett Cahall**

Madison Consolidated  
Curtis Wright Memorial Scholarship  
Dupont Alumni Scholarship

**Nicholas Center**

Madison Consolidated  
Ralph and Robin Jones Family  
Memorial Scholarship  
Tiffany Lee Carter Memorial  
Scholarship

**Brooklyn Cline**

Madison Consolidated  
Brad O’Leary Scholarship  
Broadway School Alumni Scholarship

**Landon DeAtley**

Southwestern  
Brian W. Stites Memorial  
Scholarship

**Chloe Ferris**

Madison Consolidated  
Dennis Holt Memorial Scholarship

**Abigail Fulton**

Southwestern  
Lilly Endowment Community Scholar

**Ashton Goode**

Southwestern  
Christie Crafton Memorial Scholarship  
Jefferson County 4-H Scholarship

**McKenzy Gray**

Jac-Cen-Del  
Jefferson County 4-H Scholarship

**Abigail Hanson**

Madison Consolidated  
M.W. Anderson Scholarship

**Autumn Harmon**

Southwestern  
Community Foundation Scholar Award  
Dale McNeely Scholarship

**Norman Jones**

Southwestern  
Keith Brooks Memorial Scholarship

**Johanna Leatherman**

Shawe Memorial  
Community Foundation Scholar Award  
Hall Family Scholarship

**Jennifer Mack**

IUPU Columbus  
Carolyn Bruce Spicer and Gene E.  
Spicer Adult Nursing Scholarship

**Kadin Miller**

Southwestern  
Ralph and Robin Jones Family  
Memorial Scholarship

**Kourtney Neukam**

Madison Consolidated  
CAM Car Club Scholarship

**Luke Ommen**

Madison Consolidated  
The Chan Chilton Memorial  
Scholarship

**Rachel Riley**

Madison Consolidated  
Bonnie and Printis Shelton Scholarship  
Troy Allen Pyles Memorial Scholarship  
Thomas D. Craft, Jr. Memorial Scholarship

**Clayton Seals**

Southwestern  
J. Michael Sample Memorial  
Scholarship for Music  
Marcia Morrill Memorial Scholarship  
of the Madison Rotary Club  
Mary Elizabeth Patterson Scholarship

**Kyle Shepperson**

Madison Consolidated  
Erin Turner Memorial Scholarship

**Conner Slygh**

Madison Consolidated  
George and June Kirk Scholarship

**Logan Smoot**

Madison Consolidated  
Carl J. and Mary M. Hoefling  
Memorial Scholarship of the  
Pilot Club

**Olivia Spencer**

Madison Consolidated  
Calvin Family Scholarship  
Mabel Green Memorial Scholarship

**Emily Studebaker**

Madison Consolidated  
Carolyn Bruce Spicer and Gene E.  
Spicer Nursing Scholarship  
Class of ’84 Scholarship  
Community Foundation Scholar Award  
Dorothy B. Lotz Scholarship  
Francis K. Eisan Memorial Scholarship  
Helyn Bishop Scholarship  
MCHS Class of 1966 Scholarship  
Terri Nighbert Memorial Scholarship  
The Wood Memorial Scholarship

**Trey Suggett**

Shawe Memorial  
Community Foundation Scholar Award

**Ashlee Swickard**

Madison Consolidated  
Deputy Alumni Association Scholarship

**Gracie True**

Madison Consolidated  
Glenn G. and Dorothy Ebel Huntington  
Memorial Scholarship  
Mabel Green Memorial Scholarship  
Sharon T. Alcorn Memorial Scholarship

**Emily Ward**

Madison Consolidated  
Madison Chautauqua Scholarship for the Arts  
in Memory of Bob Fourhman

**Devin Zhang**

Madison Consolidated  
Dorothy B. Lotz Scholarship  
Joseph V. Cline Scholarship  
Nathan Wilson Memorial Mathematics Scholarship

“I am so thankful to have received this award and am excited to use it as my pathway for bettering the lives of fellow Hoosiers through a career in politics and law.”

## 2021 Lilly Endowment Community Scholarship Recipient - Abby Fulton

As the 2021 Lilly Endowment Community Scholar, Southwestern High School graduate Abby Fulton received a four-year, full-tuition scholarship and \$900 yearly stipend for required books and equipment. Abby is the daughter of Josh and Paula Fulton of Hanover. She currently attends Butler University and is pursuing a degree in Pre-Law.

“I have gratitude and immense appreciation for the Community Foundation, all of the faculty and staff at Southwestern High School, and my loving family for allowing me to have this lifechanging opportunity,” Abby said. “I am so thankful to have received this award and am excited to use it as my pathway for bettering the lives of fellow Hoosiers through a career in politics and law.”

Including Abby, the six finalists (and their schools) of the 2021 Lilly Endowment Community Scholarship were: Sebastian Biallas (Madison), Autumn Harmon (Southwestern), Johanna Leatherman (Shawe Memorial), Emily Studebaker (Madison), and Trey Suggett (Shawe Memorial). Biallas, Harmon, Leatherman, Studebaker, and Suggett each received a \$1,000 Community Foundation Scholar Award for being named a finalist.

The Lilly Endowment Community Scholarship is the result of a statewide Lilly Endowment Inc. initiative to help Hoosier students reach higher levels of education. Including the 24th cohort, 4,912 full-tuition scholarships have been awarded, and over \$424 million in scholarship tuition has been provided since the program’s inception in 1998.





# BOARD, STAFF, & VOLUNTEERS

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Sue Kittinger (2002)  
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Donald McCauley (2002-2007)  
Chuck McKay (2009-2014)  
Gerry Michl (2003-2006)  
Marcella Modisett, MD (1995-2000)  
Sarah Morgan (1995-2001)  
Bernard Murphy (1995-1997)  
James C. Pendleton (1993-1997)  
Eric Phagan (2013-2016)  
Donald L. Phillips (1995-2000)  
Dr. Ralph Pratt (1991-1993)  
Dotti Reindollar (1991-1994)  
Ivan Rimstidt, D.V.M. (1993-1999)  
Howard Risk (1997-2000)  
Michael Robinson (2008-2014)  
Bruce Rose (1993-1995)  
Tim Sandker (1996-2000)  
Rhonda Sauley (1994-1998)  
Susan Schmidt (2008-2011)  
Ashley Schutte (2007-2013)  
E. Perin Scott (1991-1996)  
Wendell Seaborne (1998-2000)  
Betty L. Sebree (2001-2007)  
Margaret Seifert-Russell (2011-2017)  
Phil Sherman (1991-1998)  
Tom Solomon (2006-2012)  
Susan Stack (2006-2012)  
Ann Suchocki (2014-2020)  
Rich Sutter (1998-2000)  
Steve Telfer (2013-2018)  
Barbara Trimble (1991-1995)  
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Tony Waltz (1999-2005)  
Josh Wilber (2016-2018)  
Roger Williams (2008-2010)  
Mark Wynn (2006-2011)



# FINANCIALS

## Consolidated Statements Of Financial Position

### Assets

	2021	2020
Cash and cash equivalents	\$927,447	\$912,954
Investments	\$34,907,689	\$29,186,680
Other assets	\$353	\$353
Property and equipment, net	\$239,144	\$248,230
	<u>\$36,074,633</u>	<u>\$30,348,217</u>

### Liabilities And Net Assets

Liabilities	2021	2020
Accounts payable	\$9,526	\$12,455
Grants payable	-	\$8,400
Charitable gift annuities	\$15,974	\$16,905
Custodial funds	\$1,207,814	\$1,009,858
Total liabilities	<u>\$1,233,314</u>	<u>\$1,047,618</u>

### Net Assets

Without donor restrictions		
Operating	\$546,745	\$459,669
Board Designated - 30th Anniversary Match Program	-	\$100,000
Board Designated Administrative Endowment	\$213,513	\$187,889
Total without donor restrictions	<u>\$760,258</u>	<u>\$747,558</u>
With donor restrictions		
Restricted for specified purpose	\$472,509	\$429,930
Restricted in perpetuity endowment	\$21,332,376	\$19,934,699
Restricted subject to the Organization's spending policy	\$12,276,176	\$8,188,412
Total with donor restrictions	<u>\$34,081,061</u>	<u>\$28,553,041</u>
Total net assets	<u>\$36,074,633</u>	<u>\$30,348,217</u>

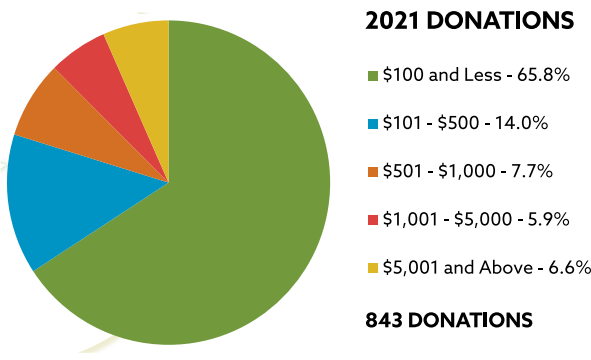
## Funds

### Endowment Funds by Type

	Fund Balance
Donor Advised	\$6,722,289
Acorn	\$9,228
Designated	\$10,450,204
Field of Interest	\$1,093,632
Scholarships	\$5,477,366
Board Advised	\$10,287,941
Agency	<u>\$969,702</u>
	<u>\$35,010,361</u>

## Grants

	Grant Amount	#	Avg. Grant Amt.
Donor Advised	\$190,330.00	118	\$1,612.97
Acorn	-	-	-
Designated	\$269,760.00	91	\$2,964.40
Field of Interest	\$38,137.00	13	\$2,933.62
Scholarships	\$124,000.00	63	\$1,968.25
Board Advised	\$256,018.00	72	\$3,555.81
Agency	\$20,300.00	14	\$1,450.00
	<u>\$898,545.00</u>	<u>371</u>	<u>\$2,421.95</u>



## Consolidated Statement of Activities

	2021		2020	
Support, revenues and other	Without Donor Restrictions	With Donor Restrictions	Total	Total
Contributions	\$2,450	\$1,274,961	\$1,277,411	\$769,626
Change in value of charitable gift annuities	-	(\$1,817)	(\$1,817)	(\$1,839)
Investment return, net	\$69,181	\$5,468,035	\$5,537,216	\$2,516,061
Management fees	\$405,087	-	\$405,087	\$316,423
Other revenues	\$12,030	-	\$12,030	\$8,084
Net assets released from restrictions	\$1,213,159	(\$1,213,159)	-	-
Total support, revenues and other	<u>\$1,701,907</u>	<u>\$5,528,020</u>	<u>\$7,229,927</u>	<u>\$3,608,355</u>
Expenses				
Program services	\$1,425,281	-	\$1,425,281	\$1,334,241
Management & general	\$152,994	-	\$152,994	\$183,145
Fundraising & development	\$110,932	-	\$110,932	\$145,055
Total expenses	<u>\$1,689,207</u>	<u>-</u>	<u>\$1,689,207</u>	<u>\$1,662,441</u>
Change in net assets	\$12,700	\$5,528,020	\$5,540,720	\$1,945,914
Net assets, beginning of year	\$747,558	\$28,553,041	\$29,300,599	\$27,354,685
Net assets, end of year	<u>\$760,258</u>	<u>\$34,081,061</u>	<u>\$34,841,319</u>	<u>\$29,300,599</u>

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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.

**Annual report designed by:**

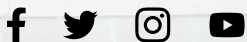
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of Madison & Jefferson County**

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