



The Community  
Foundation of  
Shelby County



# 2022

Report to the  
Community



## Welcome

2022 marks our 70th year. It is our privilege to help you give to causes, organizations and community projects that are meaningful to you. Your gifts, whether ongoing or one-time, make Shelby County improve year by year and town by town.

We worked at improving this year, too. A strategic planning process resulted in a refined Mission statement and the addition of Core Values. You'll be glad to know that we aren't changing what you told us not to change: a friendly, accessible staff, connection to the needs in Shelby County and attention to detail whether it's a new gift coming in or a granting going out.

Thank you for making Shelby County a wonderful, growing, caring community. Welcome to this review of 2022.

*Cindy*  
Cindy Helman  
Chair

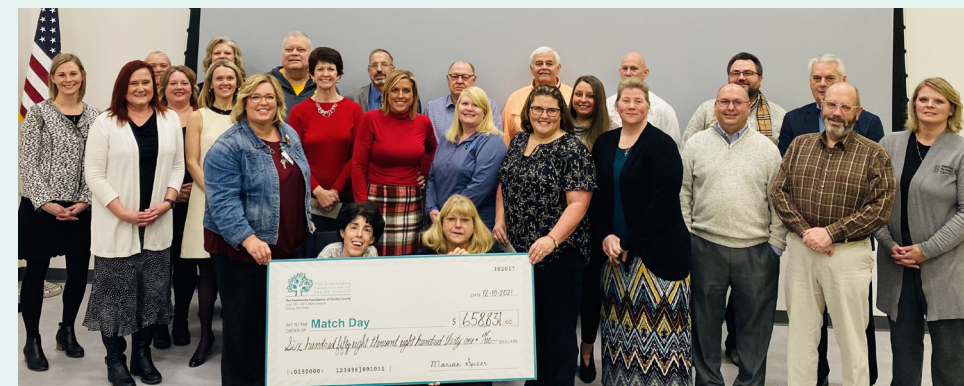


*Marian*  
Marian Spicer  
Executive Director



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*Thank you for making Match Day 2021 a success for the 23 participating organizations. More than \$658,000 went to help these organizations carry out important work, buy equipment and add programming.*

## Mission

To inspire donor generosity and transform it into meaningful, lasting impact through charitable gifts.

## Vision

To be the primary partner for donors who want to advance the community's quality of life and capacity for excellence.

## Core Values

**Stewardship** – We will support and preserve donor intent.

**Collaboration** – We will act as a catalyst and partner with others to build a better tomorrow.

**Excellence** – We will meet or exceed expectations in all we do.  
**Integrity** – We will act ethically in every relationship.

**Respect** – We will honor the dignity and worth of all.

## 2022-2023 INITIATIVES

### Initiative 1 / Objectives

- **Build** brand awareness of the Community Foundation throughout Shelby County
- **Launch** a Planned Giving program that educates about leaving a legacy gift to benefit a local cause or organization.
- **Provide** opportunities for additional donor giving that inspires long-term funds, promotes agriculture gift options, and adds giving options to engage the next generation.

**INITIATIVE 1.**  
Implement a donor cultivation strategy.

### Initiative 2 / Objectives

- **Increase** Donor Advised Funds that transition to a community-focused fund.
- **Increase** community-focused Field of Interest Funds that support giving within a Shelby County village or city.

**INITIATIVE 2.**  
Build strategy and framework for establishing community-focused funds that result in legacy generosity.

### Initiative 3 / Objectives

- **Determine** the cause(s) in Shelby County in need of funding.
- **Offer** a proactive granting opportunity including the funding method, grant monitoring and evaluation.

**INITIATIVE 3.**  
Provide collaborative leadership for funding a major community-based cause.

Shelby County Libraries' Rikki Unterbrink tells about the widely used Activity Bags and Wonder Books that were purchased with past Match Day gifts.



## 2021 Community Foundation Partners

**THANK YOU PARTNERS** for your gifts that support the annual Community Grants program. You are the resource for more than \$35,000 to \$48,800 in grants awarded to local organizations addressing local problems and opportunities. New Partners are welcome any time.

John and Tara Adams  
 Larry and Diane Alexander  
 Larry and Ann Allen  
 Anonymous (2)  
 Amy Ayers  
 Bob and Beth Baird  
 D. Jay and Peggy Baird  
 Steve and Peggy Baker  
 Mike Ballas  
 Doug and Sara Barhorst  
 Kurt and Connie Barhorst  
 Mike and Jenny Barhorst  
 Ted Barhorst  
 Julia Barker  
 Dale and Carol Barr  
 Devon and Sandy Beer  
 Tom Behr  
 Ann Bell  
 Janice Benanzer  
 Roger and Bobby Bender  
 Dan and Lori Bensman  
 Evie Bensman  
 Douglas Benson  
 John Bertsch  
 Sara Bertsch  
 Tim Bickel  
 Judy Blackford  
 Steve and Susan Blatchly  
 Phyllis Blust  
 Tom and Sondra Boecker  
 John and Eileen Boeckman  
 Joan Boltz  
 Hugh and Catherine Bonnoront  
 Doug and Beth Borchers  
 Ed Borchers  
 Tony and Joyce Bornhorst  
 Ken and Jeanie Bosslet  
 Bruce and Judi Boyd  
 Greg and Judy Buehler  
 Cassano's  
 Brent and Lori\* Clinehens  
 John E. Coffield  
 Teresa Coffield  
 Andy and Michelle Counts  
 Kent and Darlene Craver  
 Keith and Joyce Daniel  
 Jim and Janice Davis  
 Bill\* and Doris Deam  
 Mark and Joyce Deam  
 John and Betsy Deeds  
 Pete and Diane Dexter  
 John and Nettie Dunlap  
 Bob and Shirley Eck  
 David C. Edwards  
 Gloria Elsass

Nila Elsass  
 Larry and Karen Elsner  
 Emily Esau  
 Bonnie Faulkner  
 Jayne Wurstner Felgen  
 Dick and Marla Flinn  
 Evelyn Flock  
 Lois M. Fogt  
 Doug and Jessica Fortkamp  
 Jim and Karen Fortman  
 Dave and Cheryl Fortney  
 Dan and Jill Francis  
 John and Becky Francis  
 Ken and Julie Francis  
 Larry and Barbara Francis  
 Ronald and Patricia Francis  
 John and Julia Frantz  
 Rock and Gail Frantz  
 Rob and Sue Fridley  
 Mark and Jackie Fullenkamp  
 Nick and Stephanie Fullenkamp  
 Virgil and Lucy Fullenkamp  
 Duane and Tawnya Gaier  
 John and Debra Garmhausen  
 Tim and Marla Geise  
 Frank and Julie Gilardi  
 Phil and Trina Gilardi  
 Mick and Vickie Given  
 Tim and Amy Gleason  
 Don and Bev Goettemoeller  
 Russell and Rene Gottemoeller  
 Dennis and Barri Grandey  
 Ed and Karen Green  
 John and Linda Grogan  
 David and Jean Gross  
 Bob and Bonnie Guillozet  
 Brenda Hall  
 James and Joan Hall  
 Jim and Judy Harvey  
 Emma L Hecht  
 Lola N. Heintz\*  
 Arleen M Heitkamp  
 Dan and Jill Heitmeyer  
 Jeff and Cindy Helman  
 Terry Helman  
 Hemmelgarn Services, Inc  
 Richard Henke  
 Randy A. Herron  
 William and Lisa Hoewischer  
 Mark and Kristy Hoge  
 Richard and Mary Lou Holly  
 Phil and Mary Kaye Huecker  
 Wilbur and Betty Hughes  
 Michael Jannides  
 Lora Kaufman

Sue Kaufman  
 Ralph and Clara Keister  
 Rudy and Rhonda Keister  
 Daniel and Barbara Knasel  
 Steve and Rosemary Knouff  
 Steve Krivacek  
 Joe and Shannon Lachey  
 John and Edna Mae Laws  
 Bruce and Lynn Lindsey  
 Mike and Annette Lochard  
 Yvonne Lochard  
 David Lodge and Sherrie Cassad-Lodge  
 Bryson and Tiffany Long  
 Charlotte R. Lunsford  
 Dick and Suzie Martin  
 Blanche McClain  
 McCrate, DeLaet & Co  
 Cynthia F. McRill  
 Linda Meininger  
 Chris and Chris Meyer  
 Fred and Marguerite Meyers  
 Cheryl Michael  
 Dave and Connie Mielke  
 Doug Millhoff  
 Tom and Mardie Milligan  
 Sara Mitchell  
 Dave and Ann Monnier  
 Ken and Mary Beth Monnier  
 Kieth and Wendy Monnier  
 Dave and Sandy Monnin  
 Dale and Kathy Nichols  
 David and Emily O'Leary  
 Marcia Osborne  
 Glen and Vanis Phillips  
 Thomas and Donna Pleiman  
 Deb Prater  
 Veronica Presas  
 Mike and Patti Puckett  
 John and Teresa Puthoff  
 Frank and Illean Ratermann  
 Matt and Jane Ratermann  
 Gary Reed  
 Adam and Diane Reiss  
 Larry and Nancy Roettger  
 Dave Ross  
 Tom and Lisa Alvetro-Rossman  
 Donnajean Ruble  
 Dave and Lisa Ruhenkamp  
 Jay and Elaine Sargeant  
 Jeff and Nancy Sargeant  
 Marsha Sargeant-Jarvis  
 Randy and Kathy Schafer  
 Norma R. Schlagetter\*  
 Elmer and Carol Schlater  
 Jeff and Terri Schlater

### Houston FCCLA Gold Medalists

Thanks to support from the Mary E. Patterson FCCLA-FFA Fund, Houston students Sara and Sophia were able to compete in the FCCLA National Competition in San Diego where they earned a Gold Rating. Another Houston student competed and earned Silver for her project.



Ken and Brenda Schlater  
 John and Colleen Schmitt  
 Richard and Linda Scott  
 Mike and Bonnie Seffrin  
 Tim and Kathy Sell  
 Bill and Marina Shaw  
 Tom and Sandy Shoemaker  
 Jinny Shreves  
 Eric and Danielle Sielschott  
 Eric and Gay Smith  
 Norm and Jean Smith  
 Dennis and Rita Sollmann  
 Jeramie and Kara Sollmann  
 Butch and Jan Sparks  
 Marian Spicer

Spot Restaurant  
 Tim and Sarah Stammen  
 Donald L Stephan  
 Joe and Bonnie Sturm  
 Frank T Thaman  
 Jim and Ginny Thompson  
 Mike and Terri Thompson  
 Michael and Teresa Trygstad  
 Frank and Bonnie Turner  
 Gerry and Jane Ulrich  
 Jeff and Libby Van Treese  
 Hertha Vice  
 John and Karen Vornholt  
 Mark and Jane Wahl  
 Rich and Susan Wallace

Brooks and Judy Ware  
 Dan and Nita Watercutter  
 Aaron Watkins  
 Todd and Julianne Weigandt  
 Dave and Denise Welker  
 Mark Wells  
 Tom and Judy Westerheide  
 John and Susan Wilding  
 Maggi Williams  
 Gary Wilson  
 Greg and Priscilla Wilt  
 Tony and Judy Wolf  
 Amy Zorn

\*deceased

## Legacy Society

The Community Foundation of Shelby County helps you do good works forever. The Legacy Society members noted below have notified us regarding a gift from their estates to benefit a cause or organization they value. Thank you for your generosity!

Anonymous (3)  
 Douglas Wilson Allinger\*  
 Dorothy A. Barker\*  
 Roscoe P. Beanblossom\*  
 Betty Z. Bennett\*  
 Rodney R. Blake\*  
 Wayne E. Borland  
 George Brockman\*  
 Linda McReynolds Bryant  
 Lola Detrick Carmony\*  
 Jack and Connie Davis  
 Eugene P. Elsass\*  
 Ruth Bennett Emmons\*  
 Dave and Kathy Fogt  
 Harold and Lelah Fogt\*

Edmund Richard Garlow\*  
 Vera D. Ginn\*  
 George Groff\*  
 Mary Gross\*  
 Larry Hawkins  
 John G.\* and Margaret E. Humphris  
 JoAnn M. Koenig  
 W. Theodore Kuck\*  
 Phil and Bev\* Lahrmer  
 Irving Linet\*  
 John D. Long\*  
 Tom and Angela Martin  
 Dorothy A. Meyer\*  
 Doug Millhoff  
 Patrick and Carol Milligan\*

P. James Moeller  
 Joe\* and Katy Monnier  
 Gary W. Partington\*  
 Mary E. Patterson\*  
 Dave Ross  
 Dennis\* and Donnajean Ruble  
 Bob and Thelma Sargeant\*  
 Herbert and Antoinette Schlater\*  
 Louise Sheets\*  
 Brad and Claire Walterbusch  
 Kent R. Smith\*  
 Ethel Watkins\*  
 Stephen W. Weadock\*

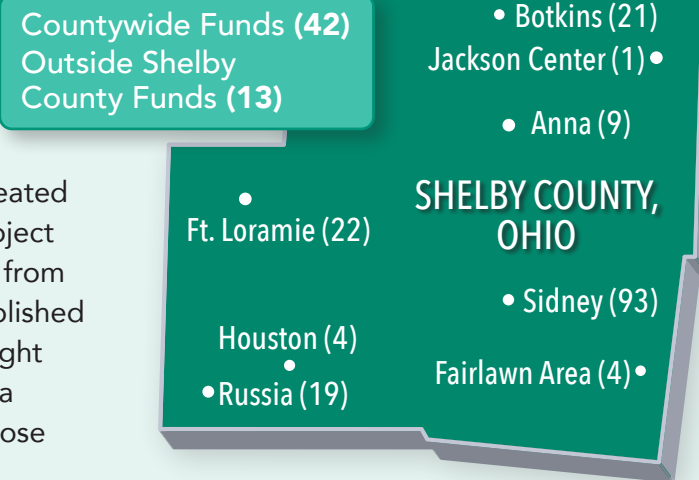
\*deceased

A gift may be made through a statement in your will or by designating the Community Foundation as a beneficiary of an IRA or life insurance policy. Your attorney or financial advisor can assist you in making a gift that is most advantageous to your personal situation.

Please let us know if you have planned a gift. You need not share specific details, but we would like the opportunity to clarify how you wish the gift to be used. Please contact Jessica Fortkamp, Donor Relations Director at (937) 497-7800.

## Investing in Your Community

Charitable Funds are created in many ways. Some have a single donor or family. Others are created by dozens of people who believe in the cause, project or organization benefitting from the fund. Donors from throughout Shelby County and beyond have established more than 230 charitable funds. The map to the right indicates the communities benefitting or creating a charitable fund, including many funds whose purpose is county-wide or beyond the county borders.



Louise Sheets

### Louise Sheets Fund

If philanthropy is defined as 'love of humanity,' Louise Sheets was a philanthropist. A widow with no children, the people of Botkins were her family and when she passed away at age 96, the Botkins

community became her heir. Residents knew Louise didn't like to be asked to give, but if a need was mentioned to her, somehow money quietly appeared.

Upon her death in 2001, Louise's will provided many gifts to community organizations and left the remainder of her estate to the Community Foundation to establish the Louise Sheets Fund. The Fund has made grants totaling nearly \$1.3 million since 2003 to organizations in and serving the Botkins area. Because of her gift, the fire department, rescue squad, park, public library, school, community swimming pool and more have the resources for new equipment, programming and improvements.

Louise's love of her community lives on.



Erick Richard

### Erick Richard Roush Young Memorial Scholarship Fund

Future Fairlawn graduates will benefit from a scholarship created in memory of the school's 1987 valedictorian. The Erick Richard Roush Young Memorial Scholarship Fund was established by his mother, Marilyn Young, after his death in

November, 2021 following a heroic battle with brain cancer.

"Erick had received numerous scholarships and his hope would be to pass on the financial benefit of these gifts to others pursuing a college education," said Marilyn. "He left a legacy of excellence for helping people live better lives."

Erick began his career in Connecticut as a medicinal chemist where he led multidisciplinary teams in the creation and refinement of novel molecules for the purpose of discovering and developing new drugs. As a Director of External Innovation in Research Beyond Borders, he led initiatives focused in the identification and enablement of novel therapeutic mechanisms, modalities and disease indications. He later mentored and advised young scientists in the company's post-doctoral training program. He authored multiple scientific articles and patents in collaboration with industry and academic investigators.

"Erick's was a lifetime of learning and giving in many, varied realms. He was an invested questioner and explorer, dedicated to truth in all walks of life. His passion for music and song was driven by a deep and abiding faith in God and the joy of combining his gifts with those of others in music ministry."

The first scholarship will be awarded to the Fairlawn High School class of 2023.



## SCARF Fund

Most entities strive for return customers, but the Shelby County Animal Rescue Foundation (SCARF) prefers that their four-legged customers leave the shelter and never return. SCARF supports the Shelby County Animal Shelter with costs for immunizations, vet care, trap-neuter-release services and facilitated donations of food, blankets and pet toys.

"SCARF's overall purpose is to assist the unwanted and neglected animals of Shelby County through support of the Shelby County Animal Shelter. We work to ensure that adoptable animals remain healthy and socialized until they find their forever home," said SCARF vice president Julie Ehemann.

The SCARF Fund at the Community Foundation of Shelby County was established in 2021 as a savings account for future large projects and other needs. One such project currently being considered is a large outdoor dog run.

The SCARF Fund is the group's second charitable fund, after their successful Building a PAWSitive Future project fund that raised money to build the Bob Sargeant and Family Shelby County Animal Shelter and Adoption Center. SCARF rallied around the need to replace the small, outdated shelter with a modern, spacious and well-equipped facility. With the completion of the new shelter, the project fund has closed.

Gifts to the SCARF Fund are welcome and ensure wagging tails and purring hearts will find permanent homes.

## William Binkley Pavilion Fund



Sidney's Tawawa Park has a stunning new picnic pavilion in its Aschenbach Grove, with a walkway leading to Big Rock, one of the park's prime features. The William Binkley Pavilion Fund assisted donors and the City of Sidney by administering gifts to build the pavilion and plant new trees.

Dr. Albert Binkley Dickas, a Sidney native and retired geologist, provided the gift to build the facility in memory of his great grandfather, William Binkley, best known for his 36-year career as editor of The Sidney Journal newspaper. In the Journal, Binkley often reminded politicians and the average citizen of their duty to improve Sidney; a concept Dr. Dickas has embraced.

"Youthful hikes from home to the woods adjacent to Tawawa Lake, introduced me to the wonders of nature, not the least being the mystery surrounding the presence and origin of Big Rock," recalls Dr. Dickas. "I learned that Big Rock was an erratic, a rock fragment carried by glacial ice and deposited some distance from the outcrop from which it was derived. Following a career as an industrial exploration geologist and a University of Wisconsin professor, retirement gave me opportunity to again explore the Tawawa area where I discovered the name of William Binkley, chiseled on the west face of Big Rock.

"Realizing his memory had become lost in the annals of time, I felt a need to resurrect an account of his many community contributions. Thus was born the idea of sponsoring a picnic pavilion that would memorialize his life and educate the public to the mystery of a Big Rock located in the verdant forest reserve I have loved for nigh on 90 years."

Members of the Aschenbach family provided gifts to replace trees and were enthusiastic about the further development of Aschenbach Grove, named in the mid-1900's to honor Rueben Aschenbach, a long-time member of city park committees.

## Creating a Fund

A charitable fund carries out your wishes. Here's how it works and what you can expect from us.

**Fund Agreement** We work with you to create an agreement specifying the fund's name and purpose and whether gifts are to be retained or spent. Template agreements are available for any of the Fund Types noted to the right. Dormant fund agreements may also be created now and then activated by a gift from your Will or other estate document.

**Gifts** There are many gifts options, but only you and your tax advisor should decide which is most advantageous to you. Please see page 13 for common types of gifts. Charitable funds may receive all gifts up front, over time or through your estate. Most funds must have an asset size of \$25,000 or more. The larger the fund, the more it can return to the community.

**Grants** Some funds, such as donor advised funds, may issue grants periodically, as you request. Others disburse annually, such as scholarship funds. Still others receive proposals from charities seeking support for their work. Grants may be issued anywhere in the U.S. and typically to qualifying not for profit organizations and educational institutions.

**Investment** Most charitable funds are invested in one of three portfolios to enable earnings and growth. Our ability to administer multiple charitable funds allows us to comeingle them for greater investment diversification. Project Funds and Gift Accounts are not invested.

**Fees** The Community Foundation's operations are supported by fees assessed to charitable funds we administer. Please contact the office to request a copy of the Fee Schedule.

**Fund Statements** Monthly reports are provided to those who are authorized. A password protected, online portal is also available, which allows viewing of the fund's activity at any time.

**Ongoing Connection to Staff** The staff considers it a privilege to assist you with your charitable giving. We welcome calls, emails and visits any time you have a question, need copies of Gift Acknowledgments or want to explore an aspect of benefiting the community. We are your resource!

## FUND TYPES

**Community Granting** Meets a wide range of charitable purposes. This fund is flexible and responsive to changing community needs. Local volunteers appointed by the CFSC award grants based upon proposals submitted by local organizations.

**Field of Interest** Awards grants to benefit causes or geographic regions you favor based upon proposals received and reviewed by local volunteers appointed by the CFSC.

**Donor Advised** Allows you to stay involved by recommending grants from the fund you established.

**Gift Account** A short-term Donor Advised Fund. Grants are made from principal (gifts).

**Scholarship** Assists students with the cost of their college education or vocational training.

**Designated** Assists charitable organizations specified when the fund is created.

**Organization** Established by a charitable organization to provide for its ongoing support.

**Project** Accomplishes community or capital projects. Receives gifts raised to pay for a specific project.

**Supporting Organization** Similar to a Donor Advised Fund but with more independence.

## Charitable Funds

Thank you for providing for the long term enhancement of our community. Charitable funds are vehicles that enable you to support the initiatives, organizations and causes most important to you. Please see page 7 for an explanation of Fund Types.

### Community Granting Funds

Community Impact Fund  
Monarch Machine  
Tool Company Legacy Fund  
Prime the Pump Fund In Loving  
Memory of Alma Wilson Allinger  
and Robert Lochard Allinger

### Designated Funds

Nancy Adams Training Center Fund  
Betty Zorn Bennett Fund  
William Binkley Pavilion Fund  
Botkins Memorial Pool Improvement  
Fund  
Ft. Loramie Village Parks Fund  
Reese C. Gross Fund  
Hall of Honor Fund \*SCSF

John and Margaret Humphris Animal  
Rescue Foundation  
The Memory Fund  
Mary E. Patterson FCCLA & FFA  
Endowment Fund \*HHLF  
Sidney Memorial Stadium Turf II Fund  
Kent R. Smith Fund  
SFC Robert E Smith Fund

### Donor Advised Funds

4 Sons Family Foundation  
Kurt and Connie Barhorst Fund  
Julia S. Barker Family Fund  
Nick and Mary Bensman Family Foundation  
Edward and Marilyn Borchers Family Foundation  
Douglas and Elizabeth Borchers Family Foundation  
Lori Lee Bricker Clinehens Memorial Fund  
John E. Coffield Fund  
Gary and Madeleine Daniel Family Foundation  
DEB Fund  
Village of DeGraff Fund  
Robert and Sondra Dunham Foundation  
Eagle Bridge Charitable Fund  
Phillip R. and Emily Shaw Esau Fund  
Douglas and Jessica Fortkamp Family Foundation  
Delbert 'Doc' and Hilda Francis Family Foundation  
John S. and Julia K. Frantz Family Foundation  
Richard R. & Gail P. Frantz Family Fund  
Thomas and Joyce Frantz Fund  
Mark and Jacqueline Fullenkamp Family Foundation  
Nick and Stephanie Fullenkamp Family Foundation  
Philip and Katrina Gilardi Family Foundation

Keister Family Foundation  
Emerson and Janet Koenig Family Fund  
Kermit T. Kuck and Ella M. Kuck Fund  
Joe and Shannon Lachey Family Foundation  
Bruce and Lynn Lindsey Family Fund  
Tom and Angela Martin Family Fund  
Dave and Ann Monnier Family Foundation  
Dale and Kathy Nichols Family Foundation  
Glen and Vanis Phillips Family Fund  
Tom and Jana Potts Family Foundation  
Adam and Diane Reiss Fund  
Right Hand Fund  
Dave Ross Foundation  
Robert and Thelma Sargeant Fund  
John and Jeanette Sargeant Family Foundation  
Jay and Elaine Sargeant Family Foundation  
Ken and Brenda Schlater Foundation  
Schmiesing Family Fund  
Richard and Linda Scott Family Endowment Fund  
Tom and Sandy Shoemaker Fund  
Sidney-Shelby County Chamber Foundation  
Norman and Jean Smith Family Fund

## How to Contribute to a Fund



### GIVE BY CREDIT CARD

1. Visit [www.commfoun.com](http://www.commfoun.com) and click the "Donate" button in the upper right corner of the screen.
2. Enter your gift amount and select the appropriate fund from the drop down menu. Add your information and continue as prompted.
3. Complete your transaction using a major credit card or your PayPal account. Please note that credit card gifts incur a processing fee of approximately 2.5% of the gift amount.

### GIVE BY CHECK

1. Make your check payable to 'Community Foundation of Shelby County' and write the intended fund's name on the memo line or an accompanying note.
2. **Mail your gift to:**  
Community Foundation of Shelby County  
100 S. Main Ave, Ste 202  
Sidney, Ohio 45365

Please see page 13 for other ways to give.

## Charitable Funds

### Field of Interest Funds

Roscoe Beanblossom Fund  
 F.I.S.H. Fund  
 John Douglas Long Blind Fund  
 Ruble Family Keep Art in Your HeART Fund

Russia Wellness Foundation  
 Louise Sheets Fund  
 Shelby County Medical Services Fund

### Organization Funds

Agape Distribution Fund  
 Alpha Community Center Fund  
 Big Brothers Big Sisters of Shelby and Darke County Fund  
 Botkins Education Foundation General Fund \*BEF  
 Botkins Local School Fund  
 Charity League of Shelby County Fund  
 Compassionate Care Free Clinic Fund  
 Compassionate Care of Shelby Co Endowment Fund  
 Ft. Loramie Education Foundation General Fund \*FLEF  
 Habitat for Humanity of Miami & Shelby Counties, OH Fund  
 Historic Sidney Theatre Fund  
 New Choices Fund  
 Operation Rebirth Fund  
 RACK Fund  
 Rustic Hope Fund

S & H Products Fund  
 Samaritan Works Fund  
 SCARF Fund  
 Senior Center of Sidney-Shelby County Foundation  
 Shelby County Arc Fund  
 Shelby County Historical Society Fund  
 Shelby County Libraries Foundation  
 Shelby County United Way Legacy Fund  
 Sidney Alive Fund  
 Sidney City Schools Foundation \*SCSF  
 Sidney First United Methodist Church Fund  
 Sidney Rotary Charitable Fund  
 Sidney-Shelby County YMCA Fund  
 Wilma Valentine Childcare Fund  
 Wilson Health Foundation Fund

### Project Funds

Anna Splash Pad Fund  
 Downtown Sidney Revitalization Fund  
 Mercy Mission House Emergency Shelter Fund  
 Raise the Roof for the Arts Campaign Fund  
 Redskin Memorial Park Fund

Russia Activity Center Addition Fund  
 Sidney Athletic Center Fund  
 Sidney Inclusive Playground Fund

### Scholarship Funds

John and Victoria Albers Memorial Scholarship Fund \*FLEF  
 Don and Helen Ambos Memorial Scholarship Fund \*BEF  
 Anna High School Class of 1942 Scholarship Fund  
 Scott F. Barker Memorial Scholarship Fund \*SCSF  
 Carol Becker Memorial Scholarship Fund \*BEF  
 Laura Behr Memorial Scholarship Fund  
 Ben-Med Scholarship Fund \*FLEF  
 Harry Emley and Mary Joslin Bennett Scholarship Fund \*SCSF  
 Edward and Marilyn Borchers Family Scholarship Fund  
 Douglas and Elizabeth Borchers Baseball/Softball Scholarship Fund  
 Douglas and Elizabeth Borchers University of Dayton Scholarship Fund  
 Joe and Mary Borchers Memorial Scholarship Fund \*FLEF  
 Homer and Mary Lou Bornhorst Family Scholarship Fund \*FLEF  
 Botkins Area Community Fund  
 Botkins Student Memorial Scholarship Fund \*BEF

Botkins Trojans Scholarship Fund  
 Botkins High School Class of 1965 Scholarship Fund \*BEF  
 Marty Bowman Football Academic Scholarship Fund \*SCSF  
 Donald and Ruth Brown Scholarship Fund \*BEF  
 Lola Detrick Carmony Scholarship Fund  
 Davis-Blackford Families Scholarship Fund  
 Edward L. and Viola A. Dietz Scholarship Fund \*BEF  
 Jim and Pat Dietz Scholarship Fund \*BEF  
 Jerry Fogt Class of 1954 Scholarship Fund \*BEF  
 Doc and Hilda Francis Family Scholarship Fund  
 Chase Fultz Memorial Scholarship Fund \*BEF  
 John Gephart "G5" Memorial Scholarship Fund \*FLEF  
 Vera DoLean Ginn Kiwanis Scholarship Fund  
 Thomas E. Given Family Scholarship Fund \*SCSF  
 Randy Greve Scholarship Fund \*BEF  
 Robert E. Grubbs Foundation  
 Larry Hawkins Family Scholarship Fund  
 Adam E. Huelskamp Scholarship Fund  
 Betty Lee Riggs Hughes Nursing Scholarship Fund

### Senior Center Karaoke

Your Match Day gifts keeps things lively at the Senior Center of Sidney-Shelby County with equipment and activities such as Friday Fun Nights, dances and Veterans-only gatherings.



### Scholarship Funds (cont'd)

IUTIS Club Scholarship Fund  
 James P. Humphrey Sidney-Shelby County Black Achievers Scholarship Fund  
 Kauffman Family Scholarship Fund  
 Donald E. and M. Jane Kemp Trade School Scholarship Fund  
 Kiwanis Club of Sidney Scholarship Endowment Fund  
 Emory and Nelda Koenig Family Scholarship Fund \*BEF  
 Lachey Family Scholarship Fund  
 Lahrmer Family Scholarship Fund \*BEF  
 Elaine Laughlin Scholarship Fund  
 Law Student Assistance Fund  
 Layton Family Foundation  
 Bruce and Lynn Lindsey Skills Scholarship Fund  
 Dr. Edward and Anne Link Fund  
 Kyle R. Magoto Scholarship Fund  
 Virginia and Richard Matz Scholarship Fund  
 Madeline Maurer Scholarship Fund \*FLEF  
 Medical and Health Professions Scholarship Fund  
 Brad Meyer Baseball Memorial Scholarship Fund \*FLEF  
 Hugo and Thelma Meyer Memorial Scholarship Fund \*FLEF  
 Leo J. Meyer Scholarship Fund \*FLEF  
 Dave and Connie Mielke Scholarship Fund \*BEF  
 Catherine Moloney Nursing Scholarship Fund  
 Dave and Ann Monnier Scholarship Fund  
 Ken and Mary Beth Monnier Engineering Scholarship Fund  
 Clair and Jeanne Naveau Family Scholarship Fund  
 New Bremen Education Endowment Fund  
 Heidi Norris Fund

Irene Palko Scholarship Fund  
 Waneta Ammon Partington Scholarship Fund  
 Mary E. Patterson Scholarship Fund \*HHLSF  
 Paul and Veronica Perin Scholarship Fund \*FLEF  
 Veronica Perin Presas Scholarship Fund \*FLEF  
 Urban and Pauline Ratermann Family Scholarship Fund \*FLEF  
 Red and Black Scholarship Fund \*FLEF  
 William A. Ross, Jr. Family Scholarship Fund  
 The Ruese Insurance Agency, Inc. Scholarship Fund  
 Robert and Thelma Sargeant Scholarship Fund  
 Bob Sargeant Skills Scholarship Fund  
 Thomas E Schafer Skills Scholarship Fund \*FLEF  
 Thomas E Schafer Scholarship Fund \*FLEF  
 Herbert and Antoinette Schlater Scholarship Fund  
 James F. and Marcia L. Schulze Scholarship Fund \*FLEF  
 Carl and Phyllis Serr Family Scholarship Fund \*BEF  
 Louise Sheets Scholarship Fund \*BEF  
 Shelby County Youth Soccer Scholarship Fund  
 Tom and Sandy Shoemaker Scholarship Fund  
 Tom and Sandy Shoemaker Skills Scholarship Fund  
 Sidney High School Alumni Scholarship Fund  
 Sidney Moose Lodge 568 Scholarship Fund  
 Woody Sturm and Sturm Family Scholarship Fund  
 William B. Swonger and Bonnie Z. Swonger Scholarship Fund  
 Frank H. and Mary I. Thaman Memorial Scholarship Fund  
 Frank T. and Virginia M. Thaman Scholarship Fund  
 Stephen W. Weadock Scholarship Fund  
 Erick Richard Roush Young Memorial Scholarship Fund  
 William and Patsy Zorn Veterans Scholarship Fund

### Supporting Organization

Donald & Evelyn Bensman Foundation

\*Affiliated with a group of funds

BEF - Botkins Education Foundation  
 FLEF - Ft. Loramie Education Foundation  
 HHLSF - Hardin-Houston Local School Foundation  
 SCSF - Sidney City Schools Foundation



Shelby County Fair-goers who dine at the Adam's Apple Café support scholarships for local students through the Adam E. Huelskamp Scholarship Fund.

## 2020 Audit Summary

Please contact the Executive Director to view a copy of the Community Foundation of Shelby County's 990 (with certain omissions to protect donor privacy), 990-T (available only for years in which it is filed), audited financial statements, investment information or IRS exemption letter.

### FINANCIAL STATEMENTS

Combined Statement of Financial Position, December 31, 2021

ASSETS		
Cash and Equivalents		\$ 9,955,714
Contributions Receivable – Project Funds		152,867
Investments		41,306,878
Property and Equipment		58,313
Other Assets		266
<b>TOTAL ASSETS</b>		<b>\$ 51,474,037</b>
LIABILITIES		
Grants Payable		\$ 337,042
Accrued liabilities		27,799
Assets held in trust for others		11,193,338
<b>TOTAL LIABILITIES</b>		<b>\$ 11,558,179</b>
NET ASSETS		
Unrestricted		\$ 39,915,858
<b>TOTAL NET ASSETS</b>		<b>\$ 39,915,858</b>
<b>TOTAL LIABILITIES AND NET ASSETS</b>		<b>\$ 51,474,037</b>

Combined Statements of Activities, December 31, 2021

REVENUES GAINS & SUPPORT		
Contributions		\$ 11,371,334
Net Investment Income (Loss)		2,646,611
Fund Management Fees		583,173
<b>TOTAL REVENUE</b>		<b>\$ 14,601,118</b>
EXPENSES		
Program Activities		\$ 3,653,137
Fundraising Costs		86,784
General & Administrative		264,488
<b>TOTAL EXPENSES AND DISBURSEMENTS</b>		<b>\$ 4,004,409</b>
<b>CHANGE IN NET ASSETS</b>		<b>\$ 10,569,709</b>
<b>ASSETS, BEGINNING OF YEAR</b>		<b>\$ 29,319,148</b>
<b>ASSETS, END OF YEAR</b>		<b>\$ 39,915,857</b>

## Investment and Spending Policy

The Community Foundation invests most charitable fund assets. The primary objective of our Investment Policy is to provide for an optimal level of total return, in real terms after inflation, and long-term growth of capital, with an acceptable exposure to risk, while maintaining the ability to support distributions.

Investment consultant Clearstead of Cleveland provides analysis and reporting to the Foundation's eight-member volunteer Investment Committee. The Investment Committee reports to the Board, which sets and monitors policy.

Project funds and most short-term charitable funds are not placed investment pools, but instead remain in money market or checking accounts to better preserve all funds until they are disbursed.

Find investment reports in the 'Who We Are' section of the Foundation's website at [www.commfoun.com](http://www.commfoun.com).

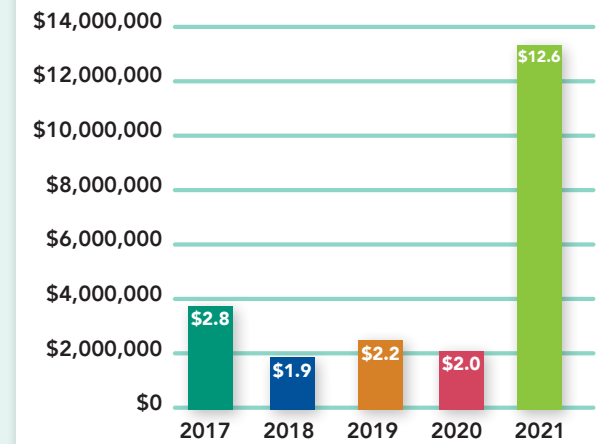
### Spending Policy

Endowed funds, meant to support the community forever, follow a Spending Policy. The Policy averages a fund's balance from the prior 16 quarters and multiplies the average by a percentage to determine the amount of annual grant dollars. Using the Spending Policy, a charitable fund keeps excess market return in favorable times and continues grant awards in unfavorable times, within certain parameters. The overall goal is that the charitable fund balance and the annual grant amount increase over time. Each investment pool has its own spending rate.

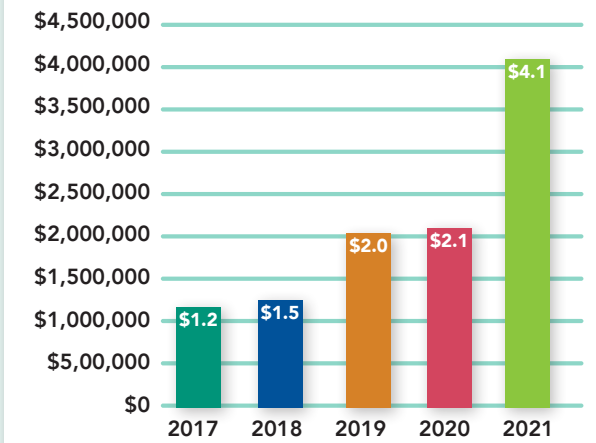
Non-endowed funds do not follow the Spending Policy, as those funds have the ability to disburse total return and principal.

## Historical Activity

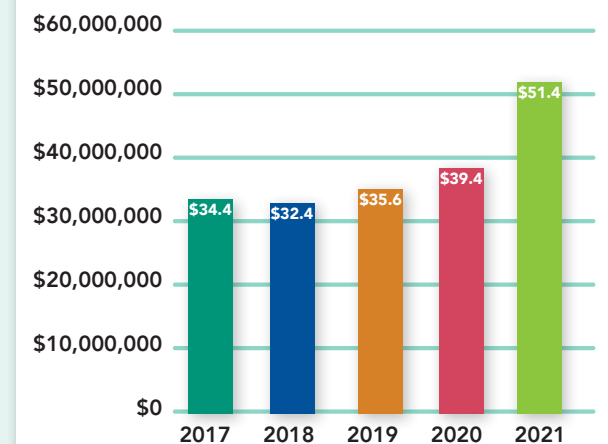
### TOTAL CONTRIBUTIONS



### TOTAL GRANTS



### TOTAL ASSETS



## Ways to Give

The mission of the Community Foundation of Shelby County is to inspire donor generosity and transform it into meaningful, lasting impact through charitable gifts. We carry out the legacy of people who provide a gift meant for short-term, long-term or permanent use within the Shelby County area.

While we welcome your gifts that add to any existing fund, we also can assist you in creating new funds that carry out specific charitable purposes.

### Giving Options

During life or through your estate, there are many options to make a gift in a way most advantageous to your personal situation. As a 501(c)(3) public charity, gifts are deductible at the highest levels allowed by law. Please contact Jessica Fortkamp, Donor Relations Director at [jfortkamp@commfoun.com](mailto:jfortkamp@commfoun.com) or (937) 497-7800 with questions or to request a copy of our Gift Acceptance Policies for General, Real Estate or Life Insurance gifts.

**Cash** – An online credit card gift or a check made payable to the Community Foundation of Shelby County is easy. Note the name of the intended fund on the check's memo line to ensure your gift is correctly credited. See page 8 for gifting details.

**Public Securities** – The fair market value of transferred shares is deductible, up to 30% of your yearly adjusted gross income. You may avoid capital gains on appreciated stock and mutual funds when we receive and sell the shares. You may also transfer privately held stock, if certain requirements are met.

**Real Estate** – The Community Foundation can accept qualifying gifts of residences, farm land, commercial property and undeveloped land. In most cases, such gifts are sold and the proceeds benefit a charitable fund.

**Grain** – Transferring ownership of grain enables farmers to give without incurring taxable income from the sale of the commodity. The cost of production may still be deducted on your tax return.

**Life Insurance** – An easy way to make a significant gift! Consider transferring ownership of an unneeded policy or developing a new policy to benefit the community in the future. Depending upon the policy, you may deduct the cash value or ongoing premium payments. You may also make the Foundation a primary or secondary beneficiary of your life insurance.

**IRA** – If you are 70½ or older, your Individual Retirement Account (IRA) may transfer up to \$100,000 a year to the Community Foundation to benefit most types of charitable funds, excluding Donor Advised Funds. The IRA gift is non-deductible, but you benefit from avoiding income taxes on the disbursement.

**Charitable Gift Annuities** – A partially deductible gift to the Community Foundation that pays you or someone you designate a set amount each year for life. Any remainder held by us at the date of death adds to or creates a charitable fund.

**Charitable Lead Trusts and Charitable Remainder Trusts** – Lead Trusts pay a fixed amount to the Community Foundation for a specified number of years with the remainder transferred to beneficiaries you name. Remainder Trusts, pay you or your designee for life with the remainder benefitting the Community Foundation. Both types provide you with tax benefits.

**Private Foundation Transfer** – Greater simplicity, fewer rules! Convert private foundation assets into a Donor Advised Fund to decrease your administrative burden, increase your tax advantages and focus your time on supporting favorite charities.



Local students volunteered for Random Acts of Christian Kindness (RACK) by making blankets that will be distributed by Right to Life of Shelby County. Grants from Donor Advised Funds helped purchase fabric.

## CFSC Trustees and Staff

Our board of trustees is comprised of Shelby County natives and long-term residents who value the principles, work ethic and community spirit found here. The board's role is to be active stewards in the investment and distribution of charitable dollars, ensuring that each charitable fund stays on the path indicated by the establishing donor or organization. Trustees are nominated by the current board of trustees and appointed by the Judge of the Shelby County Court of Common Pleas. Trustees may serve two five-year terms.



Cindy Helman



Mike Lochard



Karen Fortman



Dave Monnier

### TRUSTEES

Cindy Helman, Chair  
Mike Lochard, Vice Chair  
Dr. Karen Fortman, Secretary  
David Monnier, Treasurer  
Kurt Barhorst  
Devon Beer  
Doug Borchers  
Diane Reiss  
Lisa Ruhenkamp  
Hon. Norman Smith  
Amy Zorn



Kurt Barhorst



Devon Beer



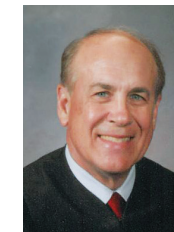
Doug Borchers



Diane Reiss



Lisa Ruhenkamp



Hon. Norm Smith



Amy Zorn



Marian Spicer



Jessica Fortkamp



Jeanne Hoying



Sandy Kinney



Juli Smith

### STAFF

Marian Spicer, Executive Director, [mspicer@commfoun.com](mailto:mspicer@commfoun.com)  
Jessica Fortkamp, Donor Relations Director, [jfortkamp@commfoun.com](mailto:jfortkamp@commfoun.com)  
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### For More Information About CFSC

Contact us at  
(937) 497-7800  
[info@commfoun.com](mailto:info@commfoun.com)  
and view our website at  
[www.commfoun.com](http://www.commfoun.com)

Our offices are in downtown Sidney:  
Courtview Center Suite 202  
100 South Main Avenue  
Sidney, OH 45365





The Community  
Foundation of  
Shelby County

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Sidney, OH 45365-2771

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## What is the Community Foundation of Shelby County?

The Community Foundation of Shelby County is a 501(c)(3) public foundation administering many charitable funds created by local residents or organizations to support favorite causes and organizations.

Each charitable fund is given a name and purpose by the individuals, families, or organizations who establish it. Foundation trustees and staff abide by the purpose

of the charitable fund, making grants to specified causes or organizations in the name of the fund. We provide the administrative structure for funds including gift acceptance, asset investment, grant disbursement and federal and state filings. Most funds are intended to be perpetuating endowments, but some have a defined life span such as the completion of a community project.

Our Mission is to inspire donor generosity and transform it into meaningful, lasting impact through charitable gifts.

[www.commfoun.com](http://www.commfoun.com)



### COMMUNITY FOUNDATION OF SHELBY COUNTY

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