

2023

REPORT TO THE COMMUNITY



The Community
Foundation of
Shelby County

Welcome

Giving a hand up. Helping out. Supporting. Paying forward. No matter the words you choose, deep in the values of Shelby County is a desire to make life better for those around us.

Thank you for all the ways you help others. It is our honor to assist you.

The values of the Community Foundation of Shelby County weave into our relationships.

- 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.

While these values set a high standard, we feel that each one is vital to maintaining your trust. Would you want it any other way?

Thank you for partnering with us in your giving. Please enjoy this review of our past year.

Michael Lochard
Board Chair



Marian Spicer
Executive Director



Table of Contents

Welcome.....	1
The Community Foundation is Your Foundation.....	2
2023 Community Foundation Partners.....	3
Planned Giving.....	5
Ways to Give.....	6
Charitable Funds.....	7-9
Investing in Your Community	10
2022 Audit Summary.....	11
Investment & Spending Policy	12
Fund Types	13
CFSC Trustees & Staff.....	14

MISSION

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

www.commfoun.com



BY THE NUMBERS

Funds: 247

Years in Existence: 71

Total Charitable Fund Value:
\$49.2 million

The Community Foundation of Shelby County is *Your* Foundation

We appreciate you and the many ways you support the community through the Community Foundation of Shelby County. Whether establishing a new charitable fund, giving to an existing one, becoming a Partner, or supporting a charity during Match Day, you make us make a difference. Thank you for everything you do to help others!

Granting Funds

247 charitable funds are housed within the Community Foundation of Shelby County, each one created to help its donor support the charities and issues they feel most passionate about. Some charities will receive a one-time grant and others receive multiple, periodic grants that will continue long into the future.

What charities do the work you value? You can help them today and tomorrow by creating a fund that gives those organizations the resources to carry on their important work.

Scholarships

When you create a scholarship fund, the invested assets generate a scholarship year after year. Graduating high school seniors, current college students completing their degrees, and young adults pursuing a skilled education all need your help to better afford schooling.

Whether a single scholarship or one that renews to support additional collegiate years, you can empower students to obtain a higher education and a better life. In 2023, 95 scholarship funds within the Community Foundation awarded more than 187 scholarships, totaling more than \$346,000.

Community Granting

Many give to help our discretionary granting program, known as Community Grants, award sums based upon proposals submitted by local organizations. Eight charitable funds give full or limited ability for grants targeting ever-changing needs in the Shelby County community. Your gift to the annual Community Foundation Partners Program also supports Community Grants.

This year, grants supported temporary housing for the homeless, school-based counseling for at-risk youth, health screening kits for cardiac patients, and so much more! Community Granting funds are flexible and always ready to support changing needs and local opportunities.

Match Day

Your gift during the Community Foundation's annual Match Day event may be doubled to help one or more participating charities. Held on Giving Tuesday (the Tuesday after Thanksgiving) it's an enthusiastic event that lets you help charities meet and exceed a goal of \$5,000 in matching money. In 2022, it was inspiring to watch more than \$812,000 raised for the 25 participating charities. Every dollar matters and every gift helps your favorite local charity receive the full matching amount.

Because of our generous Partners, Anna received a grant for the creation of a Splash Pad through the Community Foundation of Shelby County Partners Program. Anna Splash Pad opened in July of this year.



2023 Community Foundation Partners

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

John and Tara Adams
Larry and Ann Allen
Anonymous (2)
Amy Ayers
D. Jay and Peggy Baird
Bob and Beth Baird
Steve and Peggy Baker
TJ and Karen Baker
Mike and Karen Ballas
Doug and Sara Barhorst
Kurt and Connie Barhorst
Mike and Jenny Barhorst
Ted Barhorst
Julia Barker
Dale and Carol Barr
Scott Barr
Devon and Sandy Beer
Tom Behr
Ann Bell
Janice Benanzer
Dan and Lori Bensman
Evie Bensman
Douglas Benson
John Bertsch
Sara Bertsch
Tim Bickel
Judy Blackford
Steve and Susan Blatchly
Tom and Sondra Boecker
John and Eileen Boeckman
Hugh and Catherine Bonnoront
Doug and Beth Borchers
Ed and Marilyn* Borchers
Tony and Joyce Bornhorst
Ken and Jeanie Bosslet
Aaron and Leslie Boyer
Jim and Cheryl Boyer
Greg and Judy Buehler
Bernard and Phyllis Clinehens
Brent and Lori* Clinehens
John E. Coffield
Teresa Coffield
Andy and Michele Counts
Kent and Darlene Craver
Cassano's
Keith and Joyce Daniel
Jim and Janice Davis
Mark and Joyce Deam
John and Betsy Deeds
Pete and Diane Dexter
John and Nettie Dunlap
Bob and Shirley Eck
Gloria Elsass
Nila Elsass
Larry and Karen Elsner

Emily Esau
Farmers & Merchants State Bank
Bonnie Faulkner
Jayne Wurstner Felgen
David and Kathie Fields
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
Thomas and Pauline 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
John and Debra Garmhausen
Tim and Marla Geise
Richard and Jewell Giedroyce
Philip and Katrina Gilardi
Mick and Vickie Given
Don and Bev Goettemoeller
Russell and Rene Gottemoeller
Ed and Karen Green
John and Linda Grogean
David and Jean Gross
Brenda Hall
Jim and Judy Harvey
Emma L Hecht
Dan and Jill Heitmeyer
Jeff and Cindy Helman
Terry Helman
Hemmelgarn Services, Inc
Randy A. Herron
William and Lisa Hoewischer
Mark and Kristy Hoge
Richard and Mary Lou Holly
Phil and Mary Kaye Huecker
Lee Huskey
Lora Kaufman
Sue Kaufman
Tim and Dee Kearns
Rudy and Rhonda Keister
Ralph and Clara Keister
Daniel and Barbara Knasel
Steve and Rosemary Knouff
JoAnn Koenig
Steve Krivacek

Charles* and Jane Kuhlman
Joe and Shannon Lachey
Ron* and June Laughlin
John and Edna Mae Laws
Bruce and Lynn Lindsey
Mike and Annette Lochar
Yvonne Lochar
Dean and Linda Long
Charlotte Lunsford
Dick and Suzie Martin
Tom and Angela Martin
Evan and Ashliegh Maurer
Blanche McClain
Cynthia F. McRill
Linda Meininger
Tom and Barb Meyer
Tom and Diane Meyer
Cheryl Michael
Dave and Connie Mielke
Doug Millhoff
Tom and Mardie Milligan
Sara Mitchell
Brian and Susan Moloney
Dave and Ann Monnier
Ken and Mary Beth Monnier
Kieth and Wendy Monnier
Dave and Sandy Monnin
Dale and Kathy Nichols
Marcia Osborne
Glen and Vanis Phillips
Thomas and Donna Pleiman
Veronica Presas
Mike and Patti Puckett
Frank and Illean Ratermann
Matt and Jane Ratermann
Gary Reed
David and Kelly Rees
Adam and Diane Reiss
Charles and Ann Rhyan
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
Kevin and Katrina Schlarman
Elmer and Carol Schlater
Jeff and Terri Schlater
Ken and Brenda Schlater
John and Colleen Schmitt
Ralph and Rita Schulze
Richard and Linda Scott

Imagination Library graduates express their gratitude to all who helped make Imagination Library available in Shelby County!



Michael and Bonnie Seffrin
 Tim and Kathy Sell
 Bill and Marina Shaw
 Sandy Shoemaker
 Steve Shuchat
 Sidney Manufacturing Company
 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
 Steve and Lynne Springer
 Tim and Sarah Stammen

Scott and Jenna Steineman
 Karen Stockstill
 Joe and Bonnie Sturm
 Kathleen Sturm
 Joe and Kim Swartz
 Frank T. Thaman*
 Spot Restaurant
 Mike and Terri Thompson
 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
 Todd and Julianne Weigandt
 Dave and Denise Welker
 Mark Wells
 Maggi Williams
 Gary E. Wilson
 Greg and Priscilla Wilt
 Tony and Judy Wolf
 Amy Zorn

*deceased

Legacy Society

The Community Foundation of Shelby County helps you support the charities and issues you cherish most-forever. The Legacy Society members listed below have notified the Foundation 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*
 Edward and Marilyn* Borchers
 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*
 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 of Shelby County 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 a planned gift. You need not share details, but the Community Foundation would like the opportunity to clarify how you wish the gift to be used. Please contact Ashliegh Maurer, Donor Relations Director, at (937) 497-7800 or by email at amaurer@commfoun.com.

Giving that Continues Valued Programs and Services

You give because you want to help the charities and communities you value. The programs these charities provide, the lives that are touched, and the difference that is made inspires you to continue supporting their work. Where would Shelby County be without these charities? Where would these charities and your community be without you?

The Community Foundation of Shelby County helps people support the values that are important to them now and forever. When we receive a gift from a Will or Trust, the funds are set in a charitable fund that supports the causes or charities the donor intended to benefit. Depending upon the type of gift, the donor's estate receives a tax deduction.

How do I decide what to support?

Start with those places where you give your time, talent, and treasure today or in your past. Do you volunteer for an organization that could use help? Would you help the people in your town by giving to a charitable fund that provides for the ever-changing needs of things like its parks and charities? Do you want to make available to future generations the programs that have impacted your life or helped a family member? Talk to us about those ideas and we can help you make it happen.

What do I need to do?

First, work with your attorney to add a line in your Will or Trust that provides a gift to the Community Foundation of Shelby County. The statement can add details like what you want the money to support or it can be general, with the details provided to the Community Foundation in advance. You can also make the Community Foundation a beneficiary or alternate beneficiary of a life insurance policy or the remainder of an IRA or other retirement vehicle, which does not involve a change to your Will.

Many people work with us to create the document that will be activated someday by a gift from their estate. These dormant fund agreements can be altered at any time during your life and then, once a gift is received, will continue to carry your good works into the future.

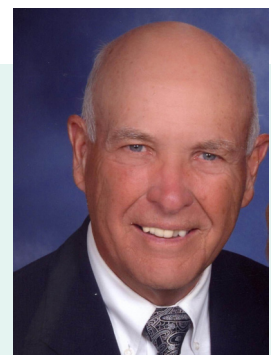
Legacy Society

If you inform us that you are planning to leave an estate gift to the Community Foundation of Shelby County, we will offer you the opportunity to be included in our Legacy Society. If you prefer anonymity, we will always respect that as well. Our Legacy Society members are located on page 4.

If you would like to discuss providing a gift through your Will or Trust to continue the charitable endeavors you are passionate about, please contact the Community Foundation's Donor Relations Director, Ashliegh Maurer.

"I have volunteered and supported many projects in Russia and the Shelby County area. One of the easiest ways to do this is with an estate gift through the Community Foundation of Shelby County. They make it very easy to fund any qualifying project, no matter where it is located."

-Ed Borchers, Legacy Society member



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 your 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 Ashliegh Maurer, Donor Relations Director at amaurer@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.

Learn more about giving to charitable funds



Your support of the Community Foundation's Match Day event helps local nonprofits carry out the vital work they do in our community. Wilma Valentine Childcare, a Match Day participant, cares for the greatest resource for the future- our children!

Charitable Funds

Thank you for providing for the long term enhancement of our community by creating and giving to the charitable funds listed below. Some are intended to give to causes forever and others have a short life span to enable people to give to favorite charities or support a community capital project. Please see page 13 for explanations 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
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 *HHLSP
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
Daniel and Lori Bensman Family Foundation
Nick and Mary Bensman Family Foundation
Douglas and Elizabeth Borchers Family Foundation
Edward and Marilyn 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
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
Dave and Lisa Ruhenkamp Fund
Jay and Elaine Sargeant Family Foundation
John and Jeanette Sargeant Family Foundation
Robert and Thelma Sargeant Fund
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

Field of Interest Funds

Roscoe Beanblossom Fund
F.I.S.H. Fund
Friends of St. Philomena Montessori School Fund
Bill and Marty Koenig Botkins Community Forever
Endowment Fund
Kermit T. Kuck and Ella M. Kuck Fund

John Douglas Long Blind Fund
Ruble Family Keep Art in Your HeART Fund
Russia Community 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
Botkins Local School Fund
Charity League of Shelby County Fund
Compassionate Care Free Clinic Fund
Compassionate Care of Shelby Co Endowment Fund
Fort Loramie Historical Association Fund
Fort. Loramie Education Foundation General Fund
Habitat for Humanity of Miami &
Shelby Counties, OH Fund
Historic Sidney Theatre Fund
Jackson Center Athletic Boosters Fund
Morgan's Place Cemetery Fund
New Choices Fund
Operation Rebirth Fund
RACK Fund
Rustic Hope Fund

Project Funds

Anna Splash Pad Fund
Dickas Pavilion Fund
Downtown Sidney Revitalization Fund
Mercy Mission House Emergency Shelter Fund
Raise the Roof for the Arts Campaign 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 High School Class of 1965 Scholarship Fund *BEF
Botkins Student Memorial Scholarship Fund *BEF

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
S & H Products Fund
Sidney Alive Fund
Sidney City Schools Foundation
Sidney First Methodist Church Fund
Sidney Rotary Charitable Fund
Sidney-Shelby County YMCA Fund
The Rev. Daniel Snider Endowment Fund for
Grace Evangelical Lutheran Church
Wilma Valentine Childcare Fund
Wilson Health Foundation Fund

Redskin Memorial Park Fund
Russia Activity Center Addition Fund
Russia Pavilion and Splash Pad Fund
Sidney Athletic Center Fund

Botkins Trojans Scholarship Fund
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
Reese C. Gross Scholarship Fund *HHLSF
Robert E. Grubbs Foundation
Larry Hawkins Family Scholarship Fund
Adam E. Huelskamp Scholarship Fund
Betty Lee Riggs Hughes Nursing Scholarship Fund
IUTIS Club Scholarship Fund

Scholarship Funds (cont'd)

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
Bill Koenig Technology Scholarship Fund *BEF
Emory and Nelda Koenig Family Scholarship Fund *BEF
Marty Koenig Health Care 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
Mike and Ann Loy Foundation *BEF
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

Supporting Organization

Donald & Evelyn Bensman Foundation

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 Scholarship Fund *FLEF
Thomas E. Schafer Skills 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 Skills Scholarship Fund
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

**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

How to Contribute to a Fund



Learn more about giving to charitable funds

GIVE BY CREDIT CARD

1. Visit 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 6 for other ways to give.

Botkins High School Seniors are awarded scholarships at this year's Botkins Education Foundation Banquet.



Investing in Your Community

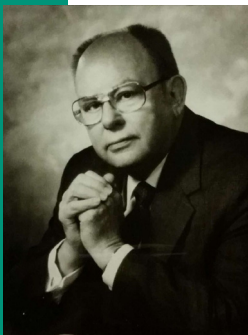
Charitable Funds are created in many ways. Some have a single donor or family. Others are created by dozens of people who believe in the cause, project or organization benefitting from the Fund. More than 240 charitable funds have been established to date by donors from throughout Shelby County and beyond. Here are two Funds making a difference. See page 13 to review Fund Types and how you can create a Fund.



Ella Kuck

Kermit T. and Ella M. Kuck Fund

The path of the Kermit T. and Ella M. Kuck Fund has been as unique and interesting as the story of the Kucks themselves. Both natives of New Knoxville, Ella gave up her teaching career in 1940 to marry Kermit, who would become the president of the iconic Monarch Machine Tool Company in 1961.



Kermit Kuck

Kermit died in 1989 and Ella in 2013, reaching age 101. In 1999, she established charitable remainder trusts to benefit her sons Joe and Ted, with the remainder going to charity after their deaths. Joe passed in 2014 and a few years later, the charitable remainder trust was brought to the

Community Foundation by Ted for its administration. Ted was highly interested in seeing that the remainder from both trusts benefitted the New Knoxville and Sidney communities.

Ted advised the Kuck Fund, issuing grants to several local charities. After his 2022 death, the Fund transitioned as planned to a Field of Interest fund that awarded its first competitive grants this year to New Knoxville's Firefighter's Association and Historical Society and to Sidney's Council of Religious Education. The fund agreement also directs annual grants to the family's churches, First Church of New Knoxville and St. John's Lutheran Church in Sidney.



Reese & Mary Gross

Reese C. Gross Funds

The late Mary Gross was known as a sweet lady and, through her estate, her legacy grows as a very giving lady. Her gifts resulted in two charitable funds bearing her husband's name that benefit youth baseball & softball programs and Houston High School grads.

The first Reese C. Gross Fund has provided more than \$40,000 since 2001 for equipment and uniforms to Sidney baseball and softball programs. IUTIS Club and Sidney Amateur Baseball have benefitted so they can help boys learn the game, focus and teamwork, thanks to the support of the fund.

The second fund, the Reese C. Gross Scholarship Fund, recently came under the umbrella of the Hardin-Houston Local School Foundation, within the Community Foundation. Beginning in 2024, two \$1,000 scholarships will be awarded to Houston graduating seniors who demonstrate need, academics, school and community service and leadership.

Ironically, Reese and Mary Gross had no children, but their generosity is providing great opportunities for local kids.

2022 Audit Summary

Please contact Marian Spicer, 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, 2022

ASSETS

Cash and Equivalents	\$ 5,967,014
Contributions Receivable – Project Funds	2,042,019
Investments	41,375,504
Property and Equipment	55,369

TOTAL ASSETS	\$ 49,439,906
---------------------	----------------------

LIABILITIES

Grants Payable	\$ 589,904
Accrued liabilities	20,066
Assets held in trust for others	14,661,381

TOTAL LIABILITIES	\$ 15,271,351
--------------------------	----------------------

NET ASSETS

Unrestricted	\$ 34,168,555
--------------	---------------

TOTAL NET ASSETS	\$ 34,168,555
-------------------------	----------------------

TOTAL LIABILITIES AND NET ASSETS	\$ 49,439,906
---	----------------------

Combined Statement
of Activities,
December 31, 2022

REVENUES GAINS & SUPPORT

Contributions	\$ 3,226,845
Net Investment Income (Loss)	6,530,183
Fund Management Fees	622,628

TOTAL REVENUE	\$ 2,680,710
----------------------	---------------------

EXPENSES

Grants	\$ 2,646,497
Program Activities	104,429
Fundraising Costs	86,414
General & Administrative	229,252

TOTAL EXPENSES AND DISBURSEMENTS	\$ 3,066,592
---	---------------------

CHANGE IN NET ASSETS	\$ 5,747,302
-----------------------------	---------------------

ASSETS, BEGINNING OF YEAR	\$ 39,915,857
----------------------------------	----------------------

ASSETS, END OF YEAR	\$ 34,168,555
----------------------------	----------------------

Investment and Spending Policy

The Community Foundation invests most charitable fund assets. The primary objective of our Investment Policy is to provide 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 in investment pools, but instead remain in money market or checking accounts to better preserve all gifts until they are disbursed.

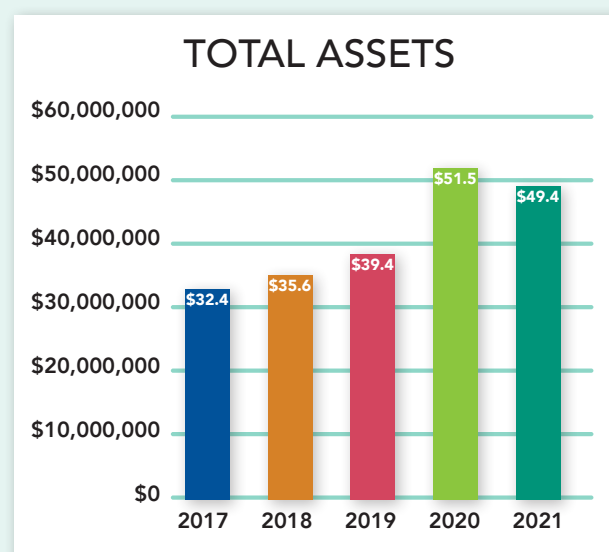
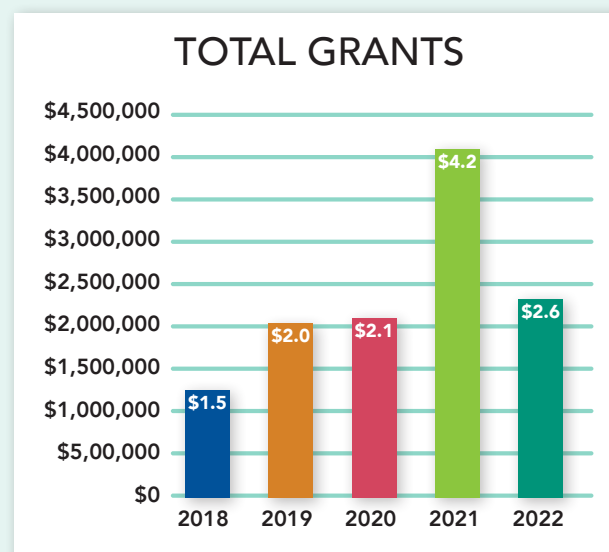
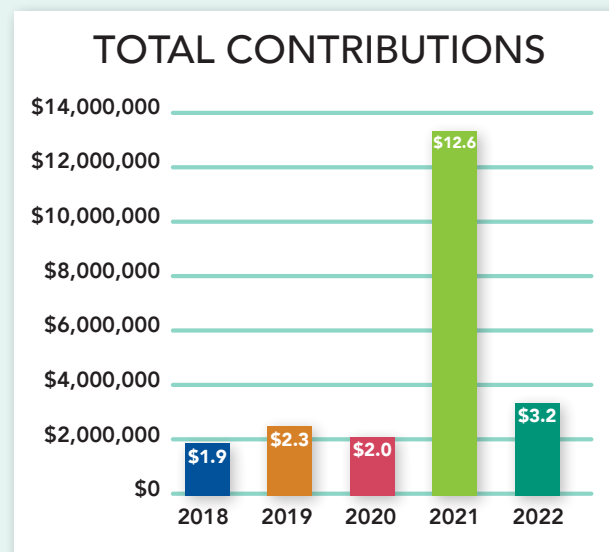
Find investment reports in the 'Who We Are' section of the Foundation's website at <https://commfoun.com>.

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



FUND TYPES

Community Granting These flexible funds are responsive to a wide-range of changing community needs. CFSC-appointed volunteers review proposals submitted by local organizations and award grants based upon community needs and merits of a request.

Field of Interest Similar to Community Granting Funds, but with a specified restriction or field of interest, such as a cause or geographic region. Grant proposals are reviewed by CFSC-appointed volunteers.

Donor Advised Allows you to stay involved by recommending grants from the fund. These funds are great for tax planning as you receive a deduction in the year a gift to the Donor Advised Fund is made. You and any successor advisors you name can recommend grants in the future using investment return and, if desired, the gifts placed in the fund.

Gift Account These short-term Donor Advised Funds help with tax planning, especially if you are bunching deductions in one tax year and taking a standard deduction in the next. You recommend grants to favorite charities until your gift is depleted, so that charities continue to receive uninterrupted support from you. Gift Accounts are great for converting stock and grain gifts into cash that is then given to your preferred charities.

Scholarship Assists students with the cost of their college education or vocational training. Most awards are for one year but some are renewable. Scholarships may be tailored to benefit high school seniors or adults.

Designated The fund agreement, when written, names charitable organizations that are to receive an annual grant. These grants continue your support to charities and enable them to rely on a stream of funding.

Organization Established by a charitable organization to provide for its ongoing support, these funds are established by an organization's board and act as a reserve for emergencies or planned growth.

Project Accomplishes community or capital projects. Receives gifts raised to pay for a specific project. The Fund closes at the conclusion of the project and once all gifts have been disbursed.

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

Creating a Fund

A charitable fund carries out your good works. Here's how it is created and operated.

Fund Agreement We work with you to customize an agreement that will help you support your favorite causes or organizations. If you are considering a fund created by your Will or other estate document, we can write the fund agreement for a future time..

Gifts You have many gift options. Please see page 6 for common types. 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.

Grants Some funds, such as Donor-Advised Funds, issue grants as you need them sent. 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. Because we administer assets of multiple charitable funds, comingled assets enable greater investment diversification. Project Funds and Gifts Accounts are not invested.

Fees The Community Foundation's operations are supported by fees assessed to charitable funds we administer.

Fund Statements Monthly reports are provided to authorized persons through emails and a password protected, online portal.

Ongoing Connection to Staff We consider it a privilege to assist you with your charitable giving. We welcome calls, emails and visits any time. We are your resource!

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 appointed by the current board of trustees and may serve two five-year terms.



Mike Lochard



Kurt Barhorst



Karen Fortman



Dave Monnier



Devon Beer



Doug Borchers



Cindy Helman



Matt Hoying



Diane Reiss



Lisa Ruhenkamp



Amy Zorn



Marian Spicer



Jeanne Hoying



Sandy Kinney



Ashliegh Maurer



Juli Smith

TRUSTEES

Mike Lochard, Chair
 Kurt Barhorst, Vice Chair
 Dr. Karen Fortman, Secretary
 Dave Monnier, Treasurer
 Devon Beer
 Doug Borchers
 Cindy Helman
 Matt Hoying
 Diane Reiss
 Lisa Ruhenkamp
 Amy Zorn

STAFF

Marian Spicer, Executive Director, mspicer@commfoun.com
 Jeanne Hoying, Accounting Manager, jhoying@commfoun.com
 Sandy Kinney, Accounting Administrator, skinney@commfoun.com
 Ashliegh Maurer, Donor Relations Director, amaurer@commfoun.com
 Juli Smith, Scholarships and Grants Administrator, jsmith@commfoun.com

For More Information About CFSC

Contact us at
 (937) 497-7800
info@commfoun.com
 and view our
 website at
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

Suite 202
100 S. Main Avenue
Sidney, OH 45365-2771

NON PROFIT
U.S. POSTAGE
PAID
SIDNEY, OH
PERMIT NO. 44

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



Find us on
Facebook

COMMUNITY FOUNDATION OF SHELBY COUNTY

Courtview Center Suite 202,
100 South Main Avenue
Sidney, OH 45365

Phone: 937-497-7800

Email: info@commfoun.com

www.commfoun.com