

REPORT TO THE COMMUNITY

2025



The Community
Foundation of
Shelby County

www.commfoun.com

Welcome

Thank you for all you do to improve lives in Shelby County! We are privileged to work throughout every local community and with you and your neighbors who have created charitable funds for scholarships, specific causes, organizations and needs that arise.

This report is about you. You make things happen and keep our most vulnerable safe, support forward-moving projects and ensure that tomorrow will be bright.

Our Values focus upon stewardship, collaboration, excellence, integrity and respect. We are grateful to serve you, as you do remarkable things for others.

Welcome to the 2025 Report to the Community.

Our Mission

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

By the Numbers

Funds: 278

Years of giving: 73

Total Charitable Fund Value: \$75Million



Board Chair
Kurt Barhorst



Executive Director
Marian Spicer

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2025 Community Foundation Partners

We are blown away by the generosity in our community. Your contributions to the 2025 Partners campaign will provide money to help save lives, increase educational opportunities, and improve the quality of life in our community. Your gifts generated over \$60,000 in the 2025 campaign that will be used to directly support the Community Grants in the Spring of 2026.

John and Tara Adams
Air Handling Equipment Inc.
Airstream, Inc.
Anonymous
Diane Alexander
Larry and Ann Allen
Bill and Donna Ankney
Nancy Archer
Amy Ayers
D. Jay and Peggy Baird
Bob and Beth Baird
Steve and Peggy Baker
TJ and Karen Baker
Doug and Sara Barhorst
Mike and Jenny Barhorst
Julia Barker
Scott 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
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
Bruce and Judi Boyd
Jim and Cheryl Boyer
Bernard and Phyllis Clinehens
Brent and Lori* Clinehens
John E. Coffield
Teresa Coffield
Steve and Cheryl Corthell
Andy and Michele Counts
Kent and Darlene Craver
Keith and Joyce Daniel
Jim and Janice Davis
Mark and Joyce Deam
Pete and Diane Dexter
Dr. Albert Dickas
John and Nettie Dunlap
Bob and Shirley Eck
Gary Elsass
Nila Elsass

Larry and Karen Elsner
Emily Esau
Bonnie Faulkner
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
Patricia Francis
John and Julia Frantz
Thomas and Joyce 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
Frank* and Julie Gilardi
Phil and Trina Gilardi
Mick and Vickie Given
Don and Bev Goettemoeller
Russ and Rene Gottemoeller
Mark and Diane Goubeaux
Ed and Karen Green
David and Jean Gross
Brenda Hall
Jim and Judy Harvey
Emma L. Hecht
Dan and Jill Heitmeyer
Jeff and Cindy Helman
Hemmelgarn Services, Inc.
Brad and Krista Hoge
Mark and Kristy Hoge
Richard and Mary Lou Holly
Michael and Lori Humphrey
Lee Huskey
Michael Jannides
Lora Kaufman
Sue Kaufman
Tim and Dee Kearns
Rudy and Rhonda Keister
Barbara Kerr
Kiwanis Club of Sidney
Daniel and Barbara Knasel
Steve and Rosemary Knouff
JoAnn Koenig
Steve Krivacek
Joe and Shannon Lachey
June Laughlin

Bruce and Lynn Lindsey
Mike and Annette Lochard
Yvonne Lochard
Bryson and Tiffany Long
Linda Long
Charlotte Lunsford
Dick and Suzie Martin
Tom and Angela Martin
Blanche McClain
Cynthia F. McRill
Chris and Christine Meyer
Tom and Barb Meyer
Tom and Diane Meyer
Cheryl Michael
Dave and Connie Mielke
Rick and Diane Milanese
Ed and Kay Miller
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
Dale and Jane Peterson
Glen and Vanis Phillips
Thomas and Donna Pleiman
Veronica Presas
Mike and Patti Puckett
John and Teresa Puthoff
Chris Ratermann
Frank and Illean Ratermann
Matt and Jane Ratermann
Gary Reed
David and Kelly Rees
Adam and Diane Reiss
Larry and Nancy Roettger
Tom and Lisa Alvetto-Rossman
Donnajeane Ruble
Dave and Lisa Ruhenkamp
Jay and Elaine Sargeant
Jeff and Nancy Sargeant
Randy and Kathy Schafer
Kevin and Katrina Schlarman
Elmer and Carol Schlater
Jeff and Terri Schlater
Ken and Brenda Schlater
John and Colleen Schmitt
Richard and Linda Scott
Bonnie Seffrin
Tim and Kathy Sell
Bill and Marina Shaw
Sidney Manufacturing Company

(Continued on Page 3)

Eric and Danielle Sielschott
Ron and Laura Simon
Eric and Gay Smith
Norman 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
Donald L. Stephan
Karen Stockstill
Sturm Construction Inc.

Joe and Bonnie Sturm
Kathleen Sturm
Joe and Kim Swartz
Mike and Terri Thompson
Michael and Teresa Trygstad
Frank and Bonnie Turner
Gerry and Jane Ulrich
Jane Van Fossen
Hertha Vice*
John and Karen Vornholt
Mark and Jane Wahl
Brooks and Judy Ware
Aaron Watkins
Roger Wehrman

Todd and JuLianne Weigandt
Dave and Denise Welker
Mark Wells*
Tom and Judy Westerheide
Maggi Williams
Greg and Priscilla Wilt
Tony and Judy Wolf
Bill and Deb* Zimmerman
Amy Zorn

*deceased



Legacy Society

Creating a Lasting Impact

The Community Foundation of Shelby County invites you to shape the future through our Legacy Society—a special group of individuals who have chosen to support the causes they care about by including a gift in their estate plans.

Members of the Legacy Society have informed the Foundation of their intention to leave a planned gift to benefit meaningful organizations and community needs. We are deeply grateful for their generosity and commitment to making a lasting difference.

Douglas Wilson Allinger*
Dorothy A. Barker*
Roscoe P. Beanblossom*
Anonymous (4)
Betty Z. Bennett*
Rodney R. Blake*
Edward and Merilyn* Borchers
Wayne E. Borland
George Brockman*
Linda McReynolds Bryant
Lola Detrick Carmony*
Jack and Connie Davis
Scott and Lynn DeLoye
Eugene P. Elsass*
Ruth Bennett Emmons*
Harry N. and Bonnie M. Faulkner
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
Dan and Tori Liette
Irving Linet*
John D. Long*
Tom and Angela Martin
Dorothy A. Meyer*
Doug Millhoff
Patrick and Carol Milligan*
P. James Moeller*
Joe* and Katherine Monnier

Gary W. Partington*
Mary E. Patterson*
Dave Ross
Dennis* and Donnajean Ruble
Dave and Lisa Ruhenkamp
Bob and Thelma Sargeant*
Herbert and Antoinette Schlater*
Rick and Lisa Schulze
Louise Sheets*
Tom and Sandy Shoemaker*
Kent R. Smith*
Frank T. Thaman*
Ethel Watkins*
Stephen W. Weadock*

*deceased

Would you like to join the Legacy Society?

Create your legacy by:

- Including a gift to the Foundation in your will or trust
- Naming the Foundation as a beneficiary of your IRA, retirement plan, or life insurance policy

Your attorney or financial advisor can help you craft a gift plan that aligns with your personal, financial, and philanthropic goals.

If you have included the Community Foundation of Shelby County in your estate plans, please let us know. You do not need to share specific details, but we'd appreciate the opportunity to understand your charitable intentions and ensure your legacy is honored as you envision.

Contact Jordan Knepper, Donor Relations Director, by phone at 937-497-7800 or email at jknepner@commfoun.com to discuss your Legacy.

9 Types of Funds



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.

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.

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 your favorite charities until your gift is depleted, so that charities continue to receive uninterrupted support from you.

Scholarships 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.

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 Private Foundation, but with fewer rules.

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 a template agreement to focus your support on 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 gifts options. Charitable funds may receive all gifts up front, over time or through your estate. Most funds must have minimum asset size of \$25,000.

Grants Some funds, such as Donor Advised Funds, issue grants 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 balance levels of risk and growth. Because we administer multiple charitable funds, comingled assets benefit from 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!



Your Gift Makes All The Difference

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 Jordan Knepper, Donor Relations Director at jknepper@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.



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 by paying no 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 benefiting the Community Foundation. Both types provide tax benefits to you.

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.

Scan with your smartphone to learn more about giving to charitable funds.



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 4 for 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

Betty Zorn Bennett Fund	Match Day Pool Fund
Botkins Memorial Pool Improvement Fund	Nancy Adams Training Center Fund
Charles and Kathleen Freeman Botkins FFA Fund *BEF	Reese C. Gross Fund
Dave and Mary Kinninger Our Forever Family Fund	Scott Spinner '59 Sidney High School
Ft. Loramie Village Parks Fund	Marching Band Fund
Hall of Honor Fund *SCSF	SFC Robert E. Smith Fund
John and Margaret Humphris Animal Rescue Foundation	Sidney Memorial Stadium Turf II Fund
Kent R. Smith Fund	The Memory Fund
Mary E. Patterson FCCLA-FFA Endowment Fund *HHLF	Tim Bickel Fund

Donor Advised Funds

4 Sons Family Foundation	Julia S. Barker Family Fund
AAA Cares Fund	Keister Family Foundation
Adam and Diane Reiss Fund	Ken and Brenda Schlater Foundation
Beigel Family Fund	Ken and Julie Francis Family Foundation
Bruce and Lynn Lindsey Family Fund	Ken and Mary Beth Monnier Family Foundation
Dale and Kathy Nichols Family Foundation	Kurt and Connie Barhorst Fund
Daniel and Lori Bensman Family Foundation	Lochard Family Foundation
Dave and Ann Monnier Family Foundation	Lori Lee Bricker Clinehens Memorial Fund
Dave and Lisa Ruhenkamp Fund	Mark and Jacqueline Fullenkamp Family Foundation
Dave Ross Foundation	Nick and Mary Bensman Family Foundation
Debby, Dave, and Reggie Boerger Family Foundation	Nick and Stephanie Fullenkamp Family Foundation
DEB Fund	Norman and Jean Smith Family Fund
Douglas and Elizabeth Borchers Family Foundation	Philip and Katrina Gilardi Family Foundation
Douglas and Jessica Fortkamp Family Foundation	Phillip R. and Emily Shaw Esau Fund
Eagle Bridge Charitable Fund	Richard and Linda Scott Family Endowment Fund
Edward and Marilyn Borchers Family Foundation	Richard R. and Gail P. Frantz Family Fund
Emerson and Janet Koenig Family Fund	Robert and Sondra Dunham Foundation
Fred and Sherry Sommer Family Foundation	Robert and Thelma Sargeant Fund
Gary P. and Madeleine F. Daniel Family Foundation	Ron and Laura Simon Family Foundation
Glen and Vanis Phillips Family Fund	Schmiesing Family Fund
Irving Linet DeGraff Community Fund	Sidney-Shelby County Chamber Foundation
Jay and Elaine Sargeant Family Foundation	Thomas and Joyce Frantz Fund
Joan and Michael Bergman Family Foundation	Thomas and Pauline Francis Fund
Joe and Shannon Lachey Family Foundation	Tom and Angela Martin Family Fund
John and Jeanette Sargeant Family Foundation	Tom and Jana Potts Family Foundation
John and Rebecca Francis Family Foundation	Tom and Sandy Shoemaker Fund
John E. Coffield Fund	...And 35 Gift Accounts
John S. and Julia K. Frantz Family Foundation	

Field of Interest Funds

Bill and Marty Koenig Botkins Community Forever Endowment Fund	Roscoe Beanblossom Fund
F.I.S.H. Fund	Ruble Family Keep Art in Your HeART Fund
John Douglas Long Blind Fund	Russia Community Endowment Fund (RWF)
Kermit T. Kuck and Ella M. Kuck 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
Clear Creek Farm Fund
Compassionate Care Free Clinic Fund
Compassionate Care of Shelby Co Endowment Fund
Fort Loramie Education Foundation General Fund *FLEF
Fort Loramie Historical Association Fund
Goods 2 Hope Fund
Habitat for Humanity of Miami & Shelby Counties, OH Fund
Historic Sidney Theatre Fund
Jackson Center Athletic Boosters Fund
Mercy Mission House Fund
Morgan's Place Cemetery Fund
New Choices Fund
Operation Rebirth Fund
RACK Fund
Rustic Hope Fund
Samaritan Works Fund



SCARF Fund
Senior Center of Sidney-Shelby County Foundation
Shelby County 4-H Foundation Fund
Shelby County Arc Fund
Shelby County CASA/GAL 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 *SCSF
Sidney First Methodist Church Fund
Sidney First Presbyterian Church Fund
Sidney Rotary Charitable Fund
Sidney-Shelby County Workforce Partnership Fund
Sidney-Shelby County YMCA Fund
The Rev. Daniel Snider Endowment Fund for Grace
Evangelical Lutheran Church
Western Buckeye Christian Service Camp Fund
Wilma Valentine Childcare Fund
Wilson Health Foundation Fund

Project Funds

Botkins Auxiliary Gym Fund
Downtown Sidney Revitalization Fund
Fort Loramie Music Boosters Band Uniform Fund
Fort Loramie Schools Athletic Complex Fund
Habitat for Humanity Rock the Block Fund
Heritage Canal Park Fund

Mercy Mission House Emergency Shelter Fund
Raise the Roof for the Arts Campaign Fund
Redskin Memorial Park Fund
Russia Activity Center Addition Fund
Shelby County Fair Livestock Complex Fund
Sidney City Schools Sports Complex Fund

Scholarship Funds

Adam E. Huelskamp Scholarship Fund
Anna High School Class of 1942 Scholarship Fund
Ben-Med Scholarship Fund *FLEF
Betty Lee Riggs Hughes Nursing Scholarship Fund
Bill Koenig Technology Scholarship Fund *BEF
Bob Sargeant Skills Scholarship Fund
Botkins Area Community Fund
Botkins High School Class of 1965 Scholarship Fund *BEF
Botkins Student Memorial Scholarship Fund *BEF
Botkins Trojans Scholarship Fund
Brad Meyer Baseball Memorial Scholarship Fund *FLEF
Bruce and Lynn Lindsey Skills Scholarship Fund
Carl and Phyllis Serr Family Scholarship Fund *BEF
Carol Becker Memorial Scholarship Fund *BEF
Catherine Moloney Nursing Scholarship Fund
Chase Fultz Memorial Scholarship Fund *BEF
Clair and Jeanne Naveau Family Scholarship Fund
Craig Barhorst Memorial Scholarship Fund
Dave and Ann Monnier Scholarship Fund
Dave and Connie Mielke Scholarship Fund *BEF
Davis-Blackford Families Scholarship Fund
Doc and Hilda Francis Family Scholarship Fund
Donald and Ruth Brown Scholarship Fund *BEF
Donald E. and M. Jane Kemp Trade School Scholarship Fund
Don and Helen Ambos Memorial Scholarship Fund *BEF
Douglas and Elizabeth Borchers Baseball/Softball
Scholarship Fund
Douglas and Elizabeth Borchers University of Dayton
Scholarship Fund

Dr. Edward and Anne Link Fund
Edward L. and Marilyn G. Borchers Family
Scholarship Fund
Edward L. and Viola A. Dietz Scholarship Fund *BEF
Elaine Laughlin Scholarship Fund
Emerson and Janet Koenig Family Scholarship Fund *BEF
Emory and Nelda Koenig Family Scholarship Fund *BEF
Erick Richard Roush Young Memorial Scholarship Fund
Frank H. and Mary I. Thaman Memorial Scholarship Fund
Frank T. and Virginia M. Thaman Scholarship Fund
Fred and Sherry Sommer Scholarship Fund
Ginny and Jim Thompson Scholarship Fund
Harry Emley and Mary Joslin Bennett
Scholarship Fund *SCSF
Heidi Norris Fund
Herbert and Antoinette Schlater Scholarship Fund
Homer and Mary Lou Bornhorst Family
Scholarship Fund *FLEF
Hugo and Thelma Meyer Memorial
Scholarship Fund *FLEF
Irene Palko Scholarship Fund
IUTIS Club Scholarship Fund
James F. and Marcia L. Schulze Scholarship Fund
James P. Humphrey Sidney-Shelby County Black
Achievers Scholarship Fund
Jerry Fogt Class of 1954 Scholarship Fund *BEF
Jim and Pat Dietz Skills Scholarship Fund *BEF
Joe and Mary Borchers Memorial Scholarship Fund *FLEF
John and Margaret Humphris Veterinary Scholarship Fund

(Continued on Page 8)

(Scholarship Funds continued)

John and Victoria Albers Memorial Scholarship Fund *FLEF
John Gephart "G5" Memorial Scholarship Fund *FLEF
Kauffman Family Scholarship Fund
Ken and Mary Beth Monnier Engineering Scholarship Fund
Kiwanis Club of Sidney Scholarship Endowment Fund
Kyle R. Magoto Scholarship Fund
Lachey Family Scholarship Fund
Lahrmer Family Scholarship Fund *BEF
Larry Hawkins Family Scholarship Fund
Laura Behr Memorial Scholarship Fund
Law Student Assistance Fund
Layton Family Foundation
Leo J. Meyer Scholarship Fund *FLEF
Lola Detrick Carmony Scholarship Fund
Louise Sheets Scholarship Fund *BEF
Madeline Maurer Scholarship Fund *FLEF
Marty Bowman Football Academic Scholarship Fund *SCSF
Marty Koenig Health Care Scholarship Fund *BEF
Mary E. Patterson Scholarship Fund *HHLF
Medical and Health Professions Scholarship Fund
Mike and Ann Loy Foundation *BEF
Mike and Mary Jo Barhorst Family Scholarship Fund *FLEF
New Bremen Education Endowment Fund
Paul and Veronica Perin Scholarship Fund *FLEF
Randy Greve Scholarship Fund *BEF
Red and Black Scholarship Fund *FLEF

Reese C. Gross Scholarship Fund *HHLF
Robert and Thelma Sargeant Scholarship Fund
Robert E. Grubbs Foundation
Schmiesing Homeschool Scholarship Fund
Scott F. Barker Memorial Scholarship Fund *SCSF
Shelby County Youth Soccer Scholarship Fund
Sidney High School Alumni Scholarship Fund
Sidney Moose Lodge 568 Scholarship Fund
Stephen W. Weadock Scholarship Fund
The Ruese Insurance Agency, Inc. Scholarship Fund
Thomas and Laura Behr Memorial Skills Scholarship Fund
Thomas E. Given Family Scholarship Fund *SCSF
Thomas E. Schafer Scholarship Fund *FLEF
Thomas E. Schafer Skills Scholarship Fund *FLEF
Tom and Sandy Shoemaker Scholarship Fund
Tom and Sandy Shoemaker Skills Scholarship Fund
Urban and Pauline Ratermann Family Scholarship Fund *FLEF
Vera DoLean Ginn Kiwanis Scholarship Fund
Veronica Perin Presas Scholarship Fund *FLEF
Virginia and Richard Matz Scholarship Fund
Waneta Ammon Partington Scholarship Fund
William and Patsy Zorn Veterans Scholarship Fund
William A. Ross, Jr. Family Scholarship Fund
William B. and Bonnie Z. Swonger Scholarship Fund
Woody Sturm and Sturm Family Scholarship Fund

Supporting Organization

Donald and Evelyn Bensman Foundation

***Affiliated with a group of funds:** BEF - Botkins Education Foundation, FLEF - Fort Loramie Education Foundation, HHLF - Hardin Houston Local School Foundation, SCSF - Sidney City Schools Foundation

Layton Family Foundation: Honoring a Father's Legacy Through Education

The Layton Family Foundation was born out of a deeply personal loss and a desire to honor a father's unwavering belief in the power of education. Following the sudden passing of Wayne Layton in June 2013, his daughters, Michelle and Mindy, and their mother, Phyllis (Layman) Layton, established the foundation to carry forward his legacy in Shelby County, where the family has its roots.

Wayne, a dedicated factory worker throughout life, instilled in his daughters the importance of education to unlock opportunities for success. The couple couldn't afford their daughters' college tuition, yet their encouragement fueled paths to earning master's degrees and building successful careers.

"Though he passed away after leaving Shelby County, we chose to give back to the community where we were born and raised," said Michelle Layton. "As first-generation college graduates who overcame financial barriers to earn degrees, we understand the challenges faced by students in similar circumstances."

Current County Commissioner Mack Knupp was the first scholarship recipient. "I vividly remember when I interviewed for the Layton Family scholarship," recalls Knupp. "My goal was to go to college debt free and this scholarship was one that helped me succeed in that goal. I am grateful for the Layton Family Foundation (selection committee) choosing me."

Layton Family Foundation scholarships support first-generation students in Shelby County. By creating this fund, Michelle and Mindy honor their father's passion for learning, ensuring his vision continues to open doors for future generations in their hometown.



Coming Together for Good: Match Day

In every corner of Shelby County, quiet heroes are at work—nonprofits that feed the hungry, care for the elderly, mentor youth, comfort the vulnerable, and inspire learning, growth, and healing. These organizations are the heart of our community, stepping in where needs arise, often behind the scenes and always with compassion.

They don't do this work for recognition. They do it because they believe in a stronger, more connected Shelby County—one where every person has a chance, every family finds support, and no neighbor is left behind.

That's why Match Day matters.

Thanks to the incredible generosity of our community, **30 local nonprofits raised a combined total of \$1,165,914.89** through Match Day 2024. That's over a million dollars directed to real needs—fueling food programs, housing assistance, youth development, mental health services, and so much more.

But Match Day isn't just about a number. It's about the lives behind every dollar given.

It's about the child who was tutored after school.

The parent who found a path forward.

The senior who didn't have to face the winter alone.



Match Day demonstrates what happens when a community believes in itself—and shows up.

Nonprofits continue their work every single day, and the impact of your past support is still being felt across the county. As we look ahead, we're excited to share that **Match Day will return in the spring of 2026, taking place on Wednesday, March 4, 2026.**

Moving the event allows us to meet needs earlier in the year, and ensures that vital programs have support when they need it most.

Your generosity has helped strengthen the fabric of our community—and the work continues. Because when we come together for good, we create lasting change.

Because together, we make Shelby County stronger.



Match Day Pool Sponsors:

- Dave Ross
- Evie Bensman
- Ed Borchers
- John and Julia Frantz
- Dave and Ann Monnier
- Ken and Brenda Schlater



Your Power to Transform Communities

Through your gifts, projects across the county have enriched the lives of residents. Initiatives such as the Anna Pickleball Courts, Botkins Track and Soccer Complex, Russia Pavilion and Splash Pad, and the Shelby County Library have all benefited from partnerships with the Community Foundation of Shelby County to manage their campaign gifts.

One of our twelve current project funds is the Fort Loramie High School Marching Band Fund. Established to help the band raise money for new uniforms, the fund exemplifies how community support preserves tradition while investing in the future.

Brad Turner shares how the Fort Loramie Marching Band has shaped his family and community:

"The Fort Loramie High School Marching Band has long been a meaningful thread in the lives of many within our community. As the son of longtime band director Frank Turner, I grew up surrounded by the music, spirit, and pride that the band represents.



During my years in the band, I learned the values of cooperation, hard work, leadership, and community pride—lessons that have carried into every part of life. Now, as a parent of three daughters who have each worn the Fort Loramie uniform, I've seen those same values instilled in them.

The current uniforms have served our community well for nearly 25 years, marching proudly in local parades, football games, and even down Main Street, USA, at Disney World. But they now show their age. It's time to invest in a new generation of uniforms that reflect the excellence and spirit of the Fort Loramie Marching Band."

Brad's story reflects the power of community support and the lasting impact of donor generosity. While this story highlights the project fund for the Fort Loramie Music Boosters, similar transformations are happening across Shelby County, thanks to your contributions to:

- Botkins Auxiliary Gym Fund
- Downtown Sidney Revitalization Fund
- Fort Loramie Schools Athletic Complex Fund
- Habitat for Humanity Rock the Block Fund
- Heritage Canal Park Fund
- Mercy Mission House Emergency Shelter Fund
- Raise the Roof for the Arts Fund
- Redskin Memorial Park Fund
- Russia Activity Center Addition Fund
- Shelby County Fair Livestock Complex Fund
- Sidney City Schools Sports Complex Fund



Each of these initiatives brings renewed vibrancy to our communities and stands as a testament to what we can accomplish together.

Thank you for enriching Shelby County through your continued generosity. Your support is not only funding projects; it is shaping lives, strengthening communities, and building a lasting legacy for generations to come.

Giving Smarter

There are many ways to give and some come with extra advantages for you, depending upon factors such as your assets or age. In addition to the Ways to Give shown on page 6, when and how you give matter.

- 1. Bunching Gifts to Benefit from Tax Laws** – Group multiple years of deductions into one year to exceed the standard deduction. Using a Donor Advised Fund or Gift Account at the Community Foundation of Shelby County enables you to make a large gift in a single year, then request grants (disbursements) to your favorite 501(c)(3) charities and churches in the following years.
- 2. Give through Your Will or Trust** – Planning a gift in your Will or Trust can have a big impact on the future of a region or charity. A statement in either document that provides a percentage or amount to a new or existing Fund at the Community Foundation means we will carry out your good works in the future.
- 3. Contribute Assets that Deduct at Fair Market Value** – Gifting appreciated assets like stock, mutual funds, property or grain typically means you deduct the Fair Market Value and eliminate capital gains taxes. We sell shares or the property and place proceeds into any charitable fund you specify.
- 4. 70 ½ and Above? Use Your IRA!** – You can issue a Qualified Charitable Distribution (QCD) from a traditional IRA, inherited IRA or inactive SEP or SIMPLE IRAs at age 70 ½. Distributing directly to charity allows you to save on income taxes. Note: IRA gifts can be given to most types of charitable funds, except Donor Advised Funds or Gift Accounts (a type of DAF).
- 5. Designated the Community Foundation as a Beneficiary of a 401(k), IRA or Life Insurance Policy** Retirement plans often carry a heavier tax burden. Life insurance can be an easy way to a charitable gift. Make the Community Foundation a primary or secondary beneficiary by notifying your plan or policy provider.

No information should be viewed as advice. Please contact your legal and tax professionals before making a gift to ensure it is appropriate for your personal situation.

Need help sorting out the possibilities? The Community Foundation of Shelby County and the Shelby County United Way have partnered to bring **Paul Grassmann of Periscope Path** to our offices for free monthly consultations. Paul is an attorney licensed in the State of Tennessee, so his services are about direction, not documents. He listens to your personal intentions and then gives input on how you can align your assets to fulfill those goals. He will include your local attorney, financial planner and tax advisor to make everything work in the best possible way.



Paul Grassmann

Contact Jordan Knepper, Donor Relations Director, at jknepper@commfoun.com or 937-497-7800 to learn more about any item above or schedule a time to meet with Paul Grassmann.



PERISCOPE PATH
Provided by Thompson & Associates

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.

Trustees



Kurt Barhorst,
Chair



Devon Beer,
Vice Chair



Lisa Ruhenkamp,
Secretary



Dave Monnier,
Treasurer



Shelly Barhorst



Liz Durnell-Maier



Mark Goubeaux



Cindy Helman



Matt Hoying



Michael Lochar



Diane Reiss



For more information
about the
Community Foundation
of Shelby County

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

Courtview Center
Suite 303
100 South Main Avenue
Sidney, Ohio 45365

Staff



Marian Spicer



Sandy Kinney



Jordan Knepper



Juli Smith

Marian Spicer, Executive Director, [mspicer@commfoun.com](mailto:mspacer@commfoun.com)
Allis Dyke, Accounting and Administrative Assistant, adyke@commfoun.com
Sandy Kinney, Senior Accountant, skinney@commfoun.com
Jordan Knepper, Donor Relations Director, jknepper@commfoun.com
Juli Smith, Scholarships and Grants Manager, jsmith@commfoun.com

2024 Audit Summary

FINANCIAL STATEMENTS

Combined Statement
of Financial Position,
December 31, 2024



Therapeutic riding at Hickory Trail Farm – supported by a grant from the CFSC.

ASSETS

Cash and Equivalents	\$ 5,266,689
Contributions Receivable-Project Funds	290,333
Investments	59,908,851
Property and Equipment	612,988
TOTAL ASSETS	\$66,078,861

LIABILITIES

Grants Payable	\$ 338,246
Accrued liabilities	29,453
Assets held in trust for others	15,411,343
TOTAL LIABILITIES	\$15,779,042

NET ASSETS

Unrestricted	\$ 50,299,819
TOTAL NET ASSETS	50,299,819

TOTAL LIABILITIES AND NET ASSETS

\$66,078,861

Combined Statement
of Financial Position,
December 31, 2024



Laughter and play at the Anna Splashpad – which was developed through a project fund at CFSC.

REVENUES GAINS & SUPPORT

Contributions	\$ 4,889,928
Net Investment Income (Loss)	4,747,460
Fund Management Fees	861,359
Gain on sale of asset	113,662
TOTAL REVENUE	\$10,612,409

EXPENSES

Grants	\$ 3,452,734
Other Program Activities	187,890
Fundraising Costs	105,246
General & Administrative	318,660

TOTAL EXPENSES AND DISBURSEMENTS

\$4,064,530

CHANGE IN NET ASSETS

\$6,547,879

ASSETS, BEGINNING OF YEAR

\$43,751,940

ASSETS, END OF YEAR

\$50,299,819

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.

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 seven-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 gifts until they are dispersed.

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

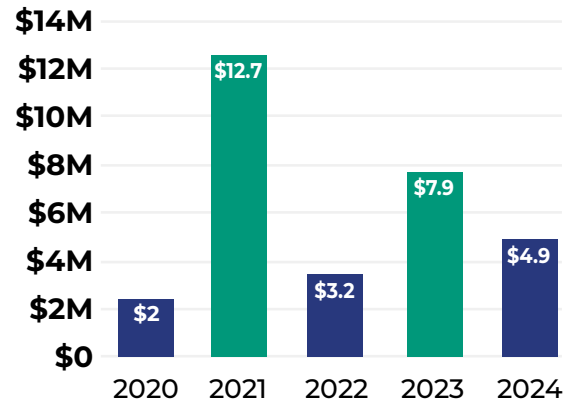
Spending Policy

Endowment 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.

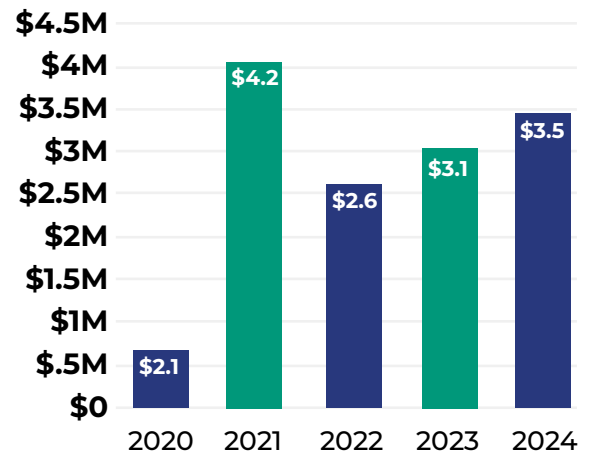
Non-endowed funds do not follow the Spending Policy, as those funds have the ability to disburse total return and principal.

Historical Activity

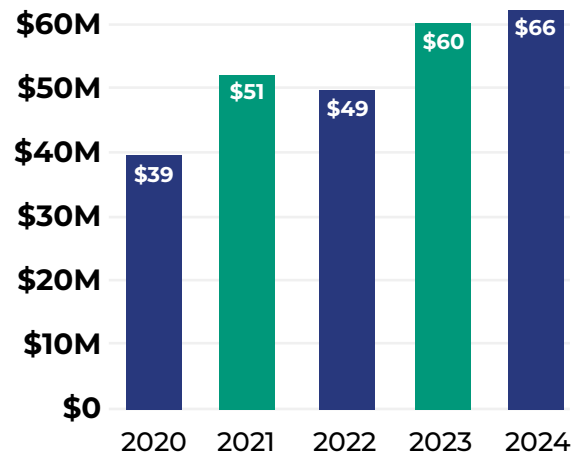
TOTAL CONTRIBUTIONS



TOTAL GRANTS



TOTAL ASSETS





The Community
Foundation of
Shelby County

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100 South Main Ave., Sidney, OH 45365
937.497.7800 • Email: info@commfoun.com

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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.

www.commfoun.com



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

