

# MARSHALL COUNTY COMMUNITY FOUNDATION

ANNUAL REPORT  
2019-2020





## FROM THE EXECUTIVE DIRECTOR'S DESK

A hundred years from now, historians will still be writing about 2020 and how heroic communities and individuals rose to the challenges. The 2019-2020 Marshall County Community Foundation Annual Report is the story of how the Marshall County Community Foundation family stepped up in partnership and in strength.

Things began normally enough. In the closing days of 2018, we heard exciting news about Lilly Endowment Inc.'s seventh phase of its Giving Indiana Funds for Tomorrow (GIFT) initiative. Through GIFT VII, Lilly Endowment seeks to build upon the momentum of previous phases to help grow financial resources to meet community needs and support community leadership to improve quality of life in our communities.

2019 and 2020, with extraordinary opportunities and challenges, are a testament to the power of collaboration and teamwork. With multiple community partners, the Foundation helped catalyze a Regional Cities and New Market Tax Credit project and brought to the county a new high quality childcare center. The Foundation supported United Way in bringing an additional \$400,000 in grants to increase the capacity of seven additional childcare providers to offer high quality preschool. The Foundation joined an incredible team of community leaders from every Marshall County city and town, and in every sector, to pursue 2019 Indiana Regional Stellar designation. The success of the Marshall County Crossroads team is told in this report.

A generous \$500,000 Lilly GIFT VII Match Grant campaign was launched to help build unrestricted endowments and increase the Foundation's capacity to respond to emerging and urgent community needs. Community Leadership Planning and Implementation Grants supported the Crossroads team in developing a Marshall County Quality of Life plan to guide work over the next 20 years with "One Vision for High Quality Hometowns." The grants also fund a team of young enFocus professionals as partners with community development projects.

During a March 12, 2020, Lilly GIFT VII Match Madness event, however, news of the cancellation of the NCAA basketball tournament was a clear and early sign that 2020 would be like none other.

Even that day when uncertainty started to unfold about what would lie ahead, we saw generous donors giving to the Foundation — to unrestricted endowment funds that, thanks to Lilly Endowment, are tripled and provide resources for future opportunities and challenges.

The Community Foundation family has a rich twenty-nine year history of philanthropy in Marshall County: scholarships to talented students, grants to nonprofits and charitable causes, community investments to enhance the reasons people choose to live, work, and play here, gifts that meet needs today and planned giving that will leave a legacy for generations.

We are here to walk with you, to serve you, through the seasons of life; the incredibly hard ones, the hopeful ones, and the joyous ones too. Thank you for your generosity and your heart. Thank you for joining an ever-widening circle of community partners and donors with vision and hope for today and for tomorrow.



**Linda K. Yoder**, *Executive Director*  
*Marshall County Community Foundation*





# BOARD MEMBERS

## FOUNDING MEMBERS

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Dr. Cecil Burket  
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## BOARD MEMBERS 2019-2020

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John Small Jr.  
Beth Styers

In 1991, Jan Garrison organized a series of meetings with community leaders to discuss the concept of a Community Foundation for Marshall County. A leadership team formed. A legacy was begun. Our Community Foundation became a catalyst to unite the county and establish a vision. We are forever indebted to the courage and vision of the Founding Members and Donors to the Marshall County Community Foundation.



# NEW FUNDS

## COMMUNITY DEVELOPMENT

- Eleanor and Randy Danielson Community Aesthetic Improvement Fund
- Lilly GIFT VII Board Engagement Grant
- Lilly GIFT VII Community Planning Grant
- Lilly GIFT VII Implementation Grant
- Will and June Erwin Community Fund

## EDUCATION

- American Legion Auxiliary Unit 27 Endowment Fund
- Build Marshall County Scholarship Fund
- The Indiana Legacy Education Support (TILES) Fund

## HEALTH AND HUMAN SERVICES

- Plymouth Lions Club Nonpermanent Fund\*

## SCHOLARSHIP

- Bruce Huff Memorial Scholarship Fund
- Chapman/Wiers Nursing Scholarship Fund
- Coach Teall Scholarship Fund
- Dale F. Reaker Memorial Scholarship Fund
- Eldon D. Shafer Memorial Scholarship Fund
- Hoosier Racing Tire Scholarship Fund
- James and Josephine Paiano Memorial Scholarship Fund
- John Ringle Memorial Scholarship Fund
- Lance McLeod Burns Argos Scholarship Fund
- Mary E. Hission Scholarship Fund
- Palbykin Aviation Scholarship Fund

\*Non-permanent fund



Please note: All pictures displaying individuals not wearing a mask were taken prior to COVID-19.



# MARSHALL COUNTY IS STELLAR - X2!



If it takes a village to raise a child, it takes five towns, one city, and one county to create a stellar community. That's exactly what Marshall County Crossroads accomplished through a collaboration of community leaders from across the region including those from government, businesses, schools, the Community Foundation and United Way and other nonprofits too. The payoff came on December 5, 2019, with the phone call that notified committee members that Marshall County Crossroads received the Indiana 2019 Stellar Communities designation. This incredible designation at the regional level was on the heels of a successful bid by the Town of Culver for the 2017 Stellar Communities designation.

Marshall County Crossroads is creating healthy, livable, and thriving communities in Argos, Bourbon, Bremen, Culver, LaPaz, and Plymouth. The Stellar vision provides current and future residents of all ages, races, and genders the best hometowns in the Midwest to live, work, and play. Millions of dollars will pour into Marshall County as a result of the Stellar designation and a quality of life plan will ensure the sustainability of this work for generations to come.

The intersection points of the vision of the Community Foundation and Marshall County Crossroads are many. The Community Foundation served a pivotal role as one of the conveners and leaders of Marshall County stakeholders throughout the Stellar application and project design process with a particular focus on Arts and Culture, Diversity and Inclusion, Education and Health and Wellness. MCCF Community Fund grants provided local match for multiple Stellar projects, strengthening the highly competitive application and achieving an extraordinary return on investment.

Culver leaders provided guidance and insight to the Marshall County Crossroads team throughout the application process for Marshall County. The Community Foundation continues to support Culver as some projects reach completion and more are yet to come. All told, eight plus years of community projects in Culver and Marshall County will be realized due to Stellar.

Stellar Communities designation is a multi-year, multi-million dollar investment into Marshall County led by the Office of Community and Rural Affairs. Additional state funding agencies are Indiana Housing and Community Development Authority, Indiana Department of Transportation, Indiana Office of Tourism Development, Department of Natural Resources, Indiana State Department of Health, Indiana Arts Commission, and the Indiana Bond Bank.

## About the Stellar Communities Program

Launched in 2011, the Stellar Communities program is a multi-agency Hoosier partnership designed to recognize smaller communities and now regions that identify comprehensive and collaborative plans for community and economic development. Through annual designation, the program provides resources for transformative quality of place community improvements by:

- Utilizing previous planning efforts
- Leveraging existing assets
- Fostering regional investments
- Stimulating continued growth for long-term relevance





# COMMUNITY FUND GRANT AWARDS

## **Community Foundation Community Fund Grants**

Twice each year, nonprofit organizations are invited to submit funding requests for projects that improve the quality of life in Marshall County. Marshall County Community Foundation Grants Committee members evaluate the proposals and conduct site visits during a competitive application process. The Community Foundation seeks to enhance the quality of life in Marshall County by providing funds through a grant making process for humanitarian, cultural, educational, recreational, and environmental activities.

The first grants from unrestricted Community Funds at the Foundation were awarded in 1995; since then the Foundation has awarded over \$4.1 million in total grants from these funds alone. In addition to the Community Fund, several named unrestricted funds also support these competitive grant rounds. Named funds include the Barbara and Ralph Winters Community Fund, the Brian and Patricia Kitch Family Community Fund, the C & M Overmyer Unrestricted Endowment Fund, the Eleanor and Randy Danielson Community Aesthetic Improvement Fund, the First Merchants Bank Community Fund, the John and Kay Finlay Community Fund, the Philip and Sylvia Bieghler Community Fund and the Paul and Carol Nye Community Fund.

The general policy of the Community Foundation is to make Community Fund Grants for innovative and creative projects serving Marshall County, and to programs which are responsive to changing community needs. The Spring 2020 Community Fund grant cycle took an unanticipated turn due to the rapid spread of COVID-19 that created a global health and economic crisis. The Board of Directors recognized the critical need to act with urgency to support the people and communities hit hardest by the impacts of COVID-19. Along with nearly 800 philanthropic organizations and Council on Foundation colleagues from across the country, the Foundation pledged to contribute to community-based emergency response funds and other efforts to address the health and economic impact on those most affected by this pandemic.



## **FALL 2020: \$75,850**

### **Community Fund Grants**

- Antiquarian and Historical Society of Culver: \$1,950 towards the rejuvenation of Heritage Park.
- Cultivate Culinary: \$10,500 to serve at-risk children healthy meals over the weekend, when their schools cannot.
- Culver Boys & Girls Club: \$4,000 to purchase new technology and STEM equipment.
- Culver Union Township Volunteer Fire Department: \$2,150 to purchase medical supplies for the creation of a medical first responder program.
- Intrepid Phoenix: \$8,000 to sponsor a Fitness Forum substance use and recovery program.
- Ivy Tech: \$12,000 for purchasing training equipment to expand pre-nursing/nursing program.
- Leadership Marshall County: \$2,050 for scholarships and new student athlete leadership program.
- Marshall County Council on Aging: \$11,900 for purchase of a transit bus.
- Plymouth Community School Corporation: \$2,300 to enhance student exposure to technology using Unmanned Aerial Vehicles (drones) in classroom settings.
- SAWS: \$2,000 to build ADA compliant ramps for two low-income, disabled Marshall County residents.
- Wild Rose Moon: \$4,000 for new equipment.
- WNIT: \$2,500 to support Education Counts Michiana.

### **Multiple Year Grants**

- Discover Plymouth: \$6,250 for biking/walking trails.\*
- David's Courage: \$6,250 for substance use disorder treatment center.\*



## **SPRING 2020: \$140,988**

### **Community Fund Grants**

- All Things New: \$1,000 in support of residential addiction recovery program.
- Bourbon Main Street Initiative: \$800 to install benches in Bourbon downtown square.
- Bremen Girls Softball League: \$4,800 to repair softball fields.
- Crossing National Inc: \$7,500 to support construction of ADA compliant restrooms.
- David's Courage: \$5,000 for COVID-19 assistance.
- Drew's Gift of Music: \$5,000 for refurbishing instruments for children in need.
- Dustin's Place, Inc: \$9,000 in start-up costs to facilitate peer-to-peer grief support.
- Marshall County Neighborhood Center: \$16,277 for ADA compliance and safety and security upgrades.
- Potawatomi Park: \$4,800 to purchase heavy duty rotary chopper.
- United Way of Marshall County/Fund the Essentials: \$40,834 to provide food, housing, and utility assistance to Marshall County families through the Marshall County COVID-19 Community Response and Recovery Fund.

### **Ralph C. Vonnegut Jr. Grants**

- Maxinkuckee Adventure Sailing: \$5,977 to enhance safety for low-cost learn-to-sail programs.

### **Multiple Year Grants**

- Habitat for Humanity: \$20,000 match for \$400,000 IHEDA grant for housing project.\*
- Town of Culver: \$10,000 from Community Funds for Culver biking/walking trails.\*
- Town of Culver: \$10,000 Vonnegut Fund for Culver biking/walking trails.\*

## FALL 2019: \$116,212

### Community Fund Grants

- Argos Izaak Walton: \$4,500 to rebuild foundation wall, restoring a piece of Marshall County's history.
- Bremen Community Cares: \$18,000 to construct an ADA compliant restroom in the Bremen Community Center.\*
- Culver Main Street Corporation: \$4,250 for an artistic place-making project for the local firehouse.\*
- David's Courage: \$3,750 assist in application and surveyor's fees to obtain national accreditation.\*
- Discover Plymouth: \$12,500 match for comprehensive Bicycle and Pedestrian Master Plan for Marshall County.\*
- Heartland Artists Gallery: \$2,445 to host three pop-up art exhibits in Marshall County.\*
- Marshall County Council on Aging: \$17,767 match to purchase two replacement vehicles for Marshall County public transit programs.
- Plymouth Lions Club: \$3,000 to purchase a pediatric auto refractor to perform vision screenings for school age children.
- Walkerton Public Safety: \$10,000 to upgrade dispatching radio equipment.
- WNIT Public Television: \$2,500 to support Education Counts program.

### Multiple Year Grants

- David's Courage: \$6,250 to support new addiction treatment center.\*
- Discover Plymouth: \$6,250 to support a Walk to School and Wellness Bucks program to encourage healthy physical activities among Marshall County's students.\*
- Garden Court: \$25,000 to support new Permanent Supportive Housing project to provide wrap-around services to the chronically homeless population in Marshall County.\*

\*The Foundation was an active partner in the Marshall County Crossroads regional planning team that secured a 2019 Stellar Designation from the Indiana Office of Rural and Community Affairs. Multiple grants were awarded in support of Stellar projects.



## SPRING 2019: \$135,996

### Community Fund Grants

- American Legion Post 27: \$5,000 to support Traveling Vietnam Veteran Memorial Wall exhibit in Marshall County.
- Argos Youth League: \$6,350 to purchase items for youth baseball fields and a new baseball pitching machine.
- Beaman Home: \$5,000 to purchase a vehicle to transport Beaman Home clients to appointments in Marshall, Fulton, and Kosciusko Counties.
- Cultivate Culinary: \$5,000 to support an innovative food rescue program and build necessary capacity for new partnerships in Marshall County to reach hungry families with nutritious food.
- Intrepid Phoenix: \$14,500 for program support for individuals in recovery from drug and alcohol addictions.
- La Paz-North Township Fire Department: \$1,750 to help purchase a water suit to aid in cold water rescues.
- Marshall County 4-H Fair Association: \$10,620 to purchase tables for new community center.
- Marshall County Habitat for Humanity: \$20,000 to help build affordable homes for families in need of assistance.
- Maxinkuckee Players: \$1,000 to support a summer production of the 1950 musical *Guys and Dolls*.
- Plymouth High School band: \$1,000 to help purchase band uniforms.
- Tippecanoe Improvement Association: \$15,000 to assist in development of a new Community Park.
- Town of Bourbon: \$1,040 to support the cycling community with a bike repair station, bicycle rack and places to rest for bicyclists.
- Wild Rose Moon: \$16,794 to further develop production facilities and purchase equipment.
- Women's Care Center: \$6,000 to support Healthy Babies and Building Kids with Character programs for underprivileged/at-risk pregnant women and young children.

### Ralph C. Vonnegut Jr. Grants

- Lake Maxinkuckee Environmental Council: \$6,500 to replace the Kline Wetland Levee to protect Lake Maxinkuckee's waters.
- Sea Scout Ship 1901: \$442 to purchase equipment to start a ship and attend the World Scout Jamboree.

### Multiple Year Grants

- Town of Culver: \$10,000 from Community Funds for Culver biking/walking trails.\*
- Town of Culver: \$10,000 from Vonnegut Fund for Culver biking/walking trails.\*



# A SEASON OF DISASTER RESPONSE AND VISIONARY PHILANTHROPY

2020 was a year dominated by one major story with an inescapable impact: COVID-19. Never before has partnership and collaboration been more essential to the health and vitality of our community. The Community Foundation served as a convener between nonprofits, government entities, businesses, and faith-based organizations. We fought to keep our community as whole as we could as the world changed around us due to the health crisis and the economic impact of necessary measures to slow the spread. The Foundation family served in an entirely new way.



**\$524,389.24**  
**Raised**

It started March 6, 2020, as Indiana recorded the first coronavirus infection. Governor Eric Holcomb issued the first public health emergency which would be extended several times, even through the end of the year.

On March 16, the Marshall County Community Foundation - together with the United Way of Marshall County - activated the Marshall County COVID-19 Community Response and Recovery Fund. A Rapid Response Grants Committee was formed with representatives from each city, town, and the countryside, from the Foundation, United Way, and the Marshall County Crossroads team. The Indiana Stay-At-Home order went into effect on March 23 and remained in place until May 1.

The Foundation and United Way boards announced the first round of 'Rapid Response' grants on April 13. By the close of 2020, 20 rounds of grants totaling \$247,563 were awarded to organizations addressing critical basic needs such as food, childcare, and housing/utility assistance for households impacted by COVID-19.

John Oliver of U.S. Granules reached out to the Foundation and United Way, sharing his deep concerns about the sheer scope of the health and economic impact of the pandemic. His concerns were fueled by the lines of cars he saw every day at the Bread of Life Food Pantry. Within days, John hosted the first meeting with Marshall County Commissioner and Crossroads Chair Kevin Overmyer, the Foundation and United Way to start recruiting 'the best fundraisers in the county.'

By May 5, the Fund the Essentials campaign was launched with a virtual event and a goal to raise \$400,000. As of November 30, 2020, this remarkable team raised \$524,389.24. The generosity and philanthropy of Marshall County was visionary. Local governments, businesses, and residents donated to serve their community when it was needed the most.

**WE TALK A LOT ABOUT HOPE, HELPING, AND TEAMWORK. OUR WHOLE MESSAGE IS THAT WE ARE MORE POWERFUL TOGETHER. ~VICTORIA OSTEEN**



**WHEN I WAS A BOY AND I WOULD  
SEE SCARY THINGS IN THE NEWS, MY  
MOTHER WOULD SAY TO ME, “LOOK  
FOR THE HELPERS. YOU WILL ALWAYS  
FIND PEOPLE WHO ARE HELPING.”**

**~ FRED ROGERS**

Community Foundation fundholders played a unique role in this work. In response to the pandemic, fundholders were given the option to redirect the annual distribution from endowment funds at the Foundation to the Marshall County COVID-19 Community Response and Recovery work. All told, these decisions provided an additional \$47,595 in Fund the Essentials donations from ten Foundation funds.

The Community Foundation Grants Committee recognized the critical need to act with urgency to support the people and communities hit hardest by the impacts of COVID-19. During the Spring and Fall 2020 Community Grant rounds, grant awards were prioritized in response to the pandemic with \$88,252 made available to support the community response and recovery work.

The Foundation and United Way partnered for an Economic Relief Initiative Grant from Lilly Endowment to bring \$275,000 to assist with immediate and long term recovery.

At the year’s end, the fight against COVID-19 is far from over as the virus surges across the country. Unlike most disasters, the response to the pandemic is still unfolding and recovery is months ahead. Even before the crisis, one in four Marshall County families were not able to make ends meet - despite working hard. A robust local nonprofit safety net will be essential as these needs become even more dire. As in traditional disaster relief, every available resource is being employed: from federal CARES Act funding for food and shelter to early childhood grants, from state rental assistance programs to mental health support. Local funds are essential in filling the gaps.

As deep as these struggles are, we know there is hope. As we wrap up 2020, the first vaccines reached Marshall County even as the country geared up for the largest ever immunization campaign. While most Americans will not be able to receive the vaccine until well into 2021, the December roll-out is a key symbolic turning point in our nation’s battle against the pandemic.

Together we will rebuild for a better, more resilient Marshall County. Generosity has always been at the foundation of our community, and today that generosity is growing to meet a new and unprecedented challenge. Thank you for your heart and passion to support your friends and neighbors and the vibrancy of our Marshall County communities.



# FUND THE ESSENTIALS DONORS



## Founders

- U.S. Granules Corporation
- City of Plymouth
- Plymouth Redevelopment Corporation
- Marshall County Community Foundation

## Pacesetters

1st Source Foundation; acpi Wood Products, LLC; AK Industries; American Containers, Inc.; Anne Benner; Bob's Cafeteria and Bruce's "Big Grill" BBQ; Bomarko, Inc.; Carol Bowen; Laura and Jerry Chavez; E. Nelson Chipman; Alan and Becky Collins; Chris and Sharon Collins and Family; Jim Conklin; Country Auto Center/Joe and Jennifer Martin Jr.; Eleanor and Randy Danielson; Mike and Judy Delp and Family; Digger Specialties, Inc.; Easterday Construction Co., Inc./Kevin Berger; First Farmers Bank and Trust; First Federal Savings Bank; The Gibson Family; David A Haist; Larry and Meredith Heckaman; James Henderson; Odette Husband; Insite Development River Gate South Apartments; Leonard Isban; Michael and Debra Isban; Les Johnson; Johnson-Danielson Funeral Home/Terri and Jim Weldy; Jones Huff & Jones, LLP; Michael Kaczynski; Tom Langdon; William Mann; Marshall County Commissioners; Marshall County Council; Marshall County Law Enforcement; Marshall County REMC Operation RoundUp; Scott and Susan Martello; Kristi and Paul Martindale; Martin's Supermarket; Masterson & Associates; Hugh Meyer; Pamela Michel; Dr. Craig and Lisa Miller; NiSource Charitable Foundation/NIPSCO; Paul and Carol Nye; John and Nadine Oliver; Jan and Marty Oosterbaan; Greg Pearson and Laura Foreno; Poor Handmaids of Jesus Christ; Pretzels, Inc.; The REES; Brad and Patricia Serf; Shelter Foundation; Dr. Tim and Sarah Smith; SRKM Architecture LLC/Brent and Eileen Martin; St. Elizabeth Episcopal Church; Dr. Tod and Ellen Stillson; Town of Bremen; Town of Culver; Town of Lapaz; Treat's Squire Shop; Truist Foundation; Dan and Charlotte Tyree; Mark and Suzanne Umbaugh; Roger and Carol Umbaugh; United Way of Marshall County, Inc.; Jon and Ruth VanVactor; Viking Paper Corporation; Charlotte and David Warner Family; Winona Powder Coating, Inc. and Winona Building Products, LLC.; Linda Yoder; John and Carol Zeglis; Zentis Food Solutions North America, LLC

**NO ONE HAS EVER BECOME POOR FROM GIVING. ~ANNE FRANK**

## Additional Donors

Barbara Alcock; Craig Anderson; Anonymous in Honor of Rusty Nixon and Fred Webster; Anonymous (4); Clyde Avery; Dr. Don and Sharon Balka; Steve and Pam Barry; Dan Bates; Richard Bean; Mr. and Mrs. Robert Beiter; Mr. and Mrs. Hank Bilsland; William Blake; Ralph and Norma Booker; Jeanne Boomershine; Kevin Bridgman; Beverly Brown; Leslie Brubaker; Larry Burnett; Michael Burroughs; Betty and Harry Busam; Kate Camper; Mary Capek; Barry Capper; Warren Casper; Jim and Cris Causey; Matthew Chamberlin; Donna Chaney; Nicholas Chaney; Melissa Christiansen; Mr. and Mrs. Paul Cleeter; Mr. and Mrs. Dennis Cote; Jeffrey D. Corsbie; Julie Crews-Barger; James Dammon; Lt. Mark Danielson; Olivia Danielson-Veed; Renee Danielson; Donnie Davidson; Bill Davis; Brenda Davis; Jim and Ann Davis; Kyle Davis; Matt and Alicia Davis; Mr. and Mrs. Orion Deruiter; Thomas and Michelle Donaghey; Donald Ecker; James W. Erwin; Will W. Erwin; Greg Farrall; Richard Featherstone; Eric Ferguson; Steve Fidler; Andrew Fitzpatrick; Dan Flynn; Mr. and Mrs. Tom Flynn; Charles Fox; Andrew Fuys; Sandy Garrison; Doug Gehrke; Paul Georgen; Ginny Gibson; Diana Gildner; Donna Girten; Vincent Glose; Chad Goze; Mr. and Mrs. Timothy Grace; Rick Graverson; Robert Gross; Mr. and Mrs. James O. Hahn; James Hartung; Phyllis Hawley; Kathy Herschberger; Kathryn Hiatt; Janet Hite; Dave Hodges; Joe and Barb Holcomb; Janis Holiday; Sally Holl; Kevin and Tammy Houin; Susan Houin; Bryan Howard; Ralph and Alice Huff; Cori Humes; Joan Hunt; Kathleen Husband; Jessica Jax; Chaplain Les Johnson; Scott Joyner; Brent Kaufman;; Anna Kietzman; Hunter Kreft; Dr. Jon and Mary Kubley; Julie Large; David A Lattimer; Jonathan Leist; Robert Listenberger; David Lloyd; Bill Londery; Rodney Ludwig; Janet Macey; Jeffrey D. Mansfield; Rodolfo Marquez; Eileen Martin; Hobart Martin; Russ Mason; Sandra Master; McKesson Title Corporation; Mid-City Supply Co., Inc.; Jon Miller; Lois and Larry Miller; Kelli Mills; Chris and Dave Morrow; Ginny and Grant Munroe; Jason Murray; Jean Nelson; Janet Newberg; Judy Newberg; Kenneth Olson; Karli Oosterbaan; Tara Oosterbaan; Jodie Overmyer; Kevin Overmyer; Debbie Palmer; Amy Paton; Greg and Sue Payne; Loretta Peters; Marianne Peters; Arleen Peterson; Roger and Janet Petill; Mike and Judy Petrucelli and Family; Christine Pickell; Barbara Pickut; Donna and Al Pontius; Kimberly Pulliam; Hugh and Karin Rettinger; Judith Ricciardi; Brandon Rich; Linda Rippy; John Rogers; Kathleen Ruffing; Daniel Sam; Mr. and Mrs. Brent Schafer; Paul Schaum; Michele Schricker; Dr. Joel Schumacher; Zach Scott; Gloria Seitz; Martha Shumaker; Karen Shuman; Elaine Small; Jamie Smith; Carol Somsel; Mary Spoor; ST Foods, Inc./Kentucky Fried Chicken - Plymouth; Linda Starr; Darren Stevens; Mr. and Mrs. Kenneth Stiles; Sean Surrisi; Beverly Towle; Bradford Trevathan; Jean Triplet; Jennifer Tromm; Jon and Ruth VanDerWeele; Nathan Walker; Fred Webster in Honor of Kathy Bottorff; Fred Webster in Honor of Greg Carroll and Karen Betz; Brandi Wilson; Catherine and Michael Wraight; Elizabeth Wray; Jane Yochum; Mark Yoder; Todd Zeltwanger

Special thanks to the Marshall County Crossroads Arts and Culture Committee for an amazing virtual kick off event on May 5, 2020. <https://bit.ly/2LRQAQq>.

# COVID-19 RAPID RESPONSE GRANT RECIPIENTS



Argos Methodist Church Food Pantry

Beaman Home

Blessings in a Backpack, Argos Elementary

Blessings in a Backpack, Culver

Blessings in a Backpack, Plymouth

Blessings in a Backpack, Walkerton Elementary

Bourbon First United Methodist Church Helping Hands Food Pantry

Boys & Girls Club of Marshall County

Bread of Life Food Pantry

County Line Brethren Church Food Pantry

Cultivate Food Rescue

Culver Community Youth Center

David's Courage

Dustin's Place

Food Bank of Northern Indiana

Grace United Church of Christ Food Pantry

Hoosiers Feeding the Hungry, Inc.

Link to Hope

Marshall County Council on Aging

Marshall County Crossroads Diversity and Inclusion Committee

Marshall County Neighborhood Center

Monastery of the Holy Martyrs Food Pantry

Oakhaven Community

Project Help

Plymouth Wesleyan Church Food Pantry

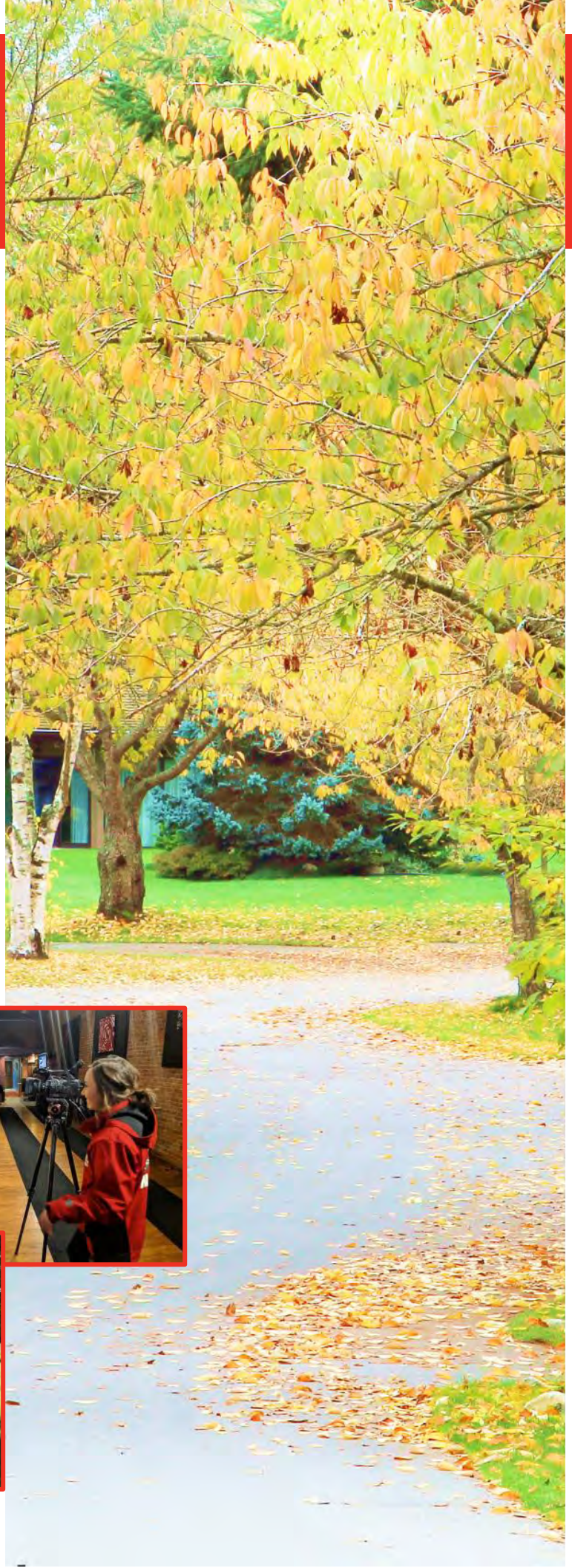
Women's Care Center



# FOUNDATION FUNDS

## ARTS AND CULTURE

Antiquarian and Historical Society Endowment Fund  
Antiquarian and Historical Society Non-Permanent Fund\*  
Bourbon Public Library Endowment Fund  
Charles and Gretchen Kimble Fund  
Culver-Union Township Public Library  
Dustin Lee Ronk Memorial Fund  
Heartland Artists Endowment Fund  
Marcia Price Art Fund  
Marshall County Historical Society Fund  
Marshall County Historical Society Non-Permanent Fund\*  
Mary A. and William S. Young Arts Fund  
MoonTree Studios Endowment Fund  
Plymouth Arts Commission Fund  
Plymouth Public Library Fund  
The REES Endowment Fund  
Wild Rose Moon Endowment Fund  
William S. and Mary A. Young Arts Fund  
WNIT Endowment Fund  
Wythougan Valley Preservation Council Fund





## COMMUNITY DEVELOPMENT

Barbara and Ralph Winters Community Fund  
Bourbon Fire Department Fire Truck Fund\*  
BOW-WOW Friends Fund  
Bremen Insulated Wire Fund  
Brian and Patricia Kitch Family Community Fund  
C and M Overmyer Unrestricted Endowment Fund  
CAPE Endowment Fund  
City of Plymouth Fund  
Culver Chamber of Commerce Fund  
Eleanor & Randy Danielson Community Aesthetic Improvement Fund  
First Merchants Bank Community Fund  
Habitat for Humanity  
Ines M. Humbert Memorial Fund  
Jennifer S. Maddox Operating Endowment Fund  
John and Kay Finlay Community Fund  
Kappa Kappa Kappa, Inc. Beta Delta Chapter Fund  
Katherine E. Garn Cemetery Fund  
Kiwanis Club of Triton Endowment Fund  
Margaret Ellen Widmar Fund  
Marion McCormack Memorial  
Marshall County Community Foundation Operating Endowment Fund  
Marshall County Humane Society, Inc. Fund  
Marshall County REMC Operation Roundup Fund\*  
MCCF 25th Anniversary Community Fund  
MCCF Community Fund  
Nelson and Wilma Leman Family/MCCF Fund  
Newman Family Zion Cemetery Fund  
Paul and Carol Nye Community Fund  
Philip and Sylvia Bieghler Community Fund  
Plymouth Rotary Club Fund  
Samuelson Family Swedish Cemetery Fund  
Sharks Build-a-Pool Fund/PAC\*  
Tusing Family Community Fund\*  
Will and June Erwin Community Fund

## DONOR ADVISED

5 M's Endowment Fund  
Beyond the Boundaries Fund  
Brad and Angela Mason Family Donor Advised Fund  
Don S. and Sharon J. Balka Donor Advised Fund  
Donald and Marlene Swank Family Endowment Fund  
Embarq Community Fund\*  
G G McMillen Fund  
Gibson Family Fund  
Glenn and Janellyn Borden Family Fund  
Gooch Family Fund  
Gordon C. and Dorothy B. Taiclet Charitable Remainder Trust  
James A. and Mary E. Henderson Donor Advised Fund  
Jane Bidwell Fund  
Jay F. and SueAnn Bates Family Fund  
John and Kay Finlay Fund  
Laramore Family Fund  
Leman Gift Fund  
LIFT Fund  
Lopp Family Fund  
Nelson and Wilma Leman Family Non-Permanent Fund\*  
Neva Mason-Charlotte and David Warner Family Fund  
Olivine Shaw Fund  
Otis R. and Carol L. Bowen Trust Fund  
Ralph and Louise Mason Family Donor Advised Fund  
Randy Neeley b STRONG 31:6 Fund  
Robert and Leona Gottschalk Fund  
Tom and Joan Gunterman Fund  
Trone Family Fund



## EDUCATION

American Legion Auxiliary Unit 27 Endowment Fund | Ancilla College Fund | Ancilla College Lewis Erwin Memorial Fund | Argos Community Schools Endowment Fund | Autism Program at Ancilla College (APAC) Endowment Fund | Bremen Public Schools Education Endowment Fund | Build Marshall County Scholarship Fund | Culver Building Trades | Elwood H. and Carol H. Hillis Charitable Fund | Holy Family Foundation Fund | International Harvester Collector's Club Northern Indiana Chapter 33 Fund | John J. Oliver Speech and Debate Fund | Leadership Marshall County Fund | Leadership Marshall County Non-Permanent\* | M Seven (M7) Global Fund\* | Marshall County Friends of Culver | Marshall County Promise Fund\* | Marshall Farmers Mutual Scholarship Fund | Palbykin Award | PHS 3 L's Fund | Plymouth Building Trades Corp. Fund | Plymouth Community Orchestra Group\* | Plymouth Education Foundation Endowment Fund | Robert P. Pickell Elementary Music Education Fund | St. Michael Catholic Church Tuition Assistance Fund | Taiclet Family Fund for Agricultural Excellence at Ancilla College | The Indiana Legacy Education Support (TILES) Fund | Triton FFA Endowment Fund | Triton Jr/Sr. High School Fund\* | Triton School Corporation Endowment Fund | Wilma S. Leman Franklin College Fund





## ENVIRONMENT

DeVota Schramm Memorial Fund  
 Frank VanGilder Fund for Magnetic Park  
 Herschell J. and Gladys M. Umbaugh Fund for Plymouth Park and Recreation  
 Jane's Park Endowment  
 Lake Maxinkuckee Environmental Fund/Curtiss Ditch Escrow\*  
 Potawatomi Park Fund  
 Ralph C. Vonnegut, Jr. Fund

## FAITH-BASED

Cecil and Berniece Burket Mission Fund  
 First United Church of Christ, Bremen Indiana Fund  
 First United Methodist Church Endowment  
 First United Methodist Church of Bourbon Endowment Fund  
 Guild Family Fund  
 Melba L. Reese Memorial Fund  
 Sandra and Richard Walter Etna Green Church of Christ Endowment Fund  
 St. Elizabeth Episcopal Church Endowment Fund  
 The Good Samaritan Fund (Plymouth Church of the Brethren)  
 Trinity United Methodist Mission Scholarship  
 Umbaugh-Garro Fund  
 Wanda J. Falconbury Memorial Fund  
 Will and Danielle Holland Crossroads Church Endowment Fund

## HEALTH AND HUMAN SERVICES

Argos Lions "We Serve" Fund  
 Argos Lions Club "We Roar" Non-Permanent Fund\*  
 Center for Hospice and Palliative Care, Inc. Endowment Fund  
 Community Hospital of Bremen Foundation Endowment Fund  
 Craig Woolfington Cancer Research Fund  
 Culver Lions Club Non-Permanent Fund\*  
 Disabled Veterans Medical Transportation Endowment Fund  
 Disabled Veterans Medical Transportation Non-Permanent Fund\*  
 Ernestine Kelley Fund  
 Heminger House Endowment Fund  
 Lifplex Community Wellness Foundation Fund\*  
 Marshall County Council on Aging Endowment Fund  
 Marshall County Council on Aging Non-Permanent Fund\*  
 Marshall County Neighborhood Center Endowment Fund  
 Marshall County Neighborhood Center Non-Permanent Fund\*  
 Marshall-Starke Development Center, Inc.  
 Michiana Benevolent Society, Inc.  
 Ounce of Prevention Fund\*  
 Plymouth Kiwanis Disabled Children's Fund  
 Plymouth Lions Club Nonpermanent Fund\*  
 Richard and Ernestine Edel Endowment Fund  
 Saint Joseph Community Health Fund  
 Saint Joseph Regional Medical Center Emergency Department Fund  
 Thornburg/Donnelly Fund  
 United Way of Marshall County Endowment Fund  
 United Way of Marshall County Non-Permanent Fund\*



## SCHOLARSHIPS

3 C's Scholarship Fund

Alberta Middaugh Memorial Scholarship

Alvin C. Boise Scholarship Fund

Ancilla College-Ruth and Lawrence Castaldi Scholarship Fund

Argos Dollars for Scholars

Argos Dollars For Scholars Flexible Non-Permanent Fund\*

Argos Dollars for Scholars Non-Permanent Fund\*

Argos High School Class of 1957 Scholarship Fund

Argos Lions Club Scholarship

Audrey Grossman Memorial Scholarship Fund

Betty Jean Wilson Zehner Memorial Scholarship Fund

Beverly E. Falconbury Memorial Scholarship

Bill and Barbara Snyder Memorial Scholarship

Bourbon High School Alumni Association Scholarship Fund

Bowen Family Medical Scholarship Fund

Bowen Medical Education Fund

Breanna Lemler Memorial Scholarship Fund

Bremen Dollars for Scholars Non-Permanent Fund\*

Bremen Dollars for Scholars, Inc.

Bremen Future Farmers of America Scholarship Fund

Bremen High School Alumni Scholarship Fund

Bremen Kiwanis Scholarship Fund

Bremen Masonic Lodge/Eastern Star Endowment

Bremen School Board Scholarship Fund

Brian Zeider Memorial Scholarship Fund

Bruce and Vivian VanDerWeele Scholarship Fund

Bruce Huff Memorial Scholarship Fund

Caroline (Doll) Mikel Memorial Scholarship Fund

Chad Edward Pearson Memorial Scholarship Fund

Chad Edward Pearson Memorial Scholarship Benefiting Knute Rockne Kiwanis Club

Chapman/Wiers Nursing Scholarship Fund

Charles King Memorial Scholarship Fund

Christina Gibbs Memorial Fund

Clarence and Bonnie Shaffer Scholarship

Community Academic Rewards for Excellence Endowment Fund

Compton Engineering Scholarship Fund

Craig Woolfington Memorial Scholarship Fund

Crystal M. Metsker Scholarship Fund

Culver Alumni and Community Scholarship Fund

Culver Community Schools Staff Scholarship Fund

Culver Lions Club Scholarship Fund

Culver Tri Kappa Scholarship Fund

Culver Young Farmers Agricultural Scholarship Fund

D. Neil Rettinger Memorial Scholarship

Dale F. Reaker Memorial Scholarship Fund

Dan Koontz Memorial Fund

David (Davy) G. Dunkin Memorial Fund

Dean and Gretchen Kimble Music Scholarship Fund

Desi Jones Memorial Scholarship Fund

Dieckmann Jac Cen Del High School Dollars for Scholars

Donald D. Zeglis Memorial Advised Scholarship Fund

**SINCE 1991, THE MCCF HAS GRANTED \$22.8 MILLION TO MARSHALL COUNTY STUDENTS, SCHOOLS, NONPROFITS, AND PHILANTHROPIC CAUSES. \$4.1 HAS BEEN GRANTED FROM COMMUNITY FUNDS DURING THE BI-ANNUAL MCCF GRANT CYCLE.**





Dorothy Irene Mitchell Memorial Nursing Scholarship Fund  
 Dorothy L. Peterson and Dudley A. Peterson Memorial Scholarship Fund  
 Dr. C. James Callahan Veterinary Student Scholarship Fund  
 Dr. Christie L. Peterson Scholarship Fund  
 Dr. David R. Barkmeier Top Research Universities Scholarship Fund

Dr. J. Kent Guild Memorial Scholarship Fund  
 Dustin Cullen Scholarship Fund  
 Eldon D. Shafer Memorial Scholarship Fund  
 Ella M. Leeper Scholarship Fund  
 Eunice Schrimsher Memorial Scholarship Fund  
 Frank DeSantis Endowment Fund  
 Fred Nierste Scholarship Fund  
 G. Ernest and Bernadine Rightley Scholarship Fund  
 GLO Scholarship Fund

Golden Girls Scholarship Fund  
 Greg LaFree Endowment Fund  
 Harold D. Miller Memorial Scholarship  
 Helen G. and Gerald M. Hess Scholarship Fund  
 Herman and Florence Mattix Scholarship Fund  
 Herschell and Gladys Umbaugh Scholarship Fund  
 Hoosier Racing Tire Scholarship Fund  
 Indiana University Alumni and Friends of Marshall County Fund

Ivan Kelley Family Scholarship Fund  
 J. O. Thompson Memorial Scholarship  
 J. Ward and Margaret M. Leeper Scholarship  
 Jack Kochert Memorial Scholarship Fund  
 Jake Spaid Memorial Fund  
 James and Josephine Paiano Memorial Scholarship Fund

James H. Wysong Scholarship Fund  
 James R. Cook PHS Class of 1961 Scholarship Fund  
 Jan and Ted Chittum Scholarship Fund  
 Jane Sieg Stillson Memorial Fund  
 Jean Pfeiffer Memorial Fund  
 Jill Carpenter Memorial Fund

Jim Blount Memorial Scholarship Fund  
 Jo Ellen Castleman/Hull Scholarship Fund  
 John and Ruby Leman Scholarship Fund  
 John E. Thomas Visual Arts Scholarship Fund  
 John R. Manring Memorial Scholarship Fund  
 John Ringle Memorial Scholarship Fund

John Ruff Scholarship Fund  
 Jordan Family Scholarship Fund  
 Julia P. Trowbridge Fund  
 Julia Yockey Shakes Memorial Scholarship Fund



Katherine E. Garn Scholarship Fund  
 Kenny and Nancy Chapman Scholarship Fund  
 Kitty Lockridge and the Class of 1967 Scholarship Fund  
 Lance McLeod Burns Argos Scholarship Fund  
 Lapaz Lions Club Scholarship  
 Larry Dumph Memorial Scholarship Fund  
 Larry R. Linhart Scholarship Fund  
 Leon R. Verhaeghe Vocational Agriculture Memorial Scholarship  
 Lewis and Neva Mason Scholarship Fund  
 Linda Parker Science and Mathematics Scholarship Fund  
 Linda Weaver Memorial Fund  
 Madison and Elizabeth Stephenson Scholarship Fund  
 Margot and Merlin Jones Scholarship Fund  
 Marian and Stephen Wayne Munn Agriculture Scholarship Fund  
 Marianne Ransdell Memorial Scholarship Fund  
 Marohn Family Fund  
 Marshall County 4-H Council Memorial Scholarship Fund  
 Marshall County 4-H Horse and Pony Scholarship Fund  
 Mary E. Hission Scholarship Fund  
 Mary Winquist Franklin and Joe Franklin Scholarship Fund  
 Matthew J. Morris Scholarship Fund  
 Mattix Scholarship Fund  
 Mavis Shank Memorial Scholarship Fund  
 Max and Lois Edmonds Scholarship Fund  
 Michael Charles Albert Scholarship Fund  
 Michael Noel Magee Scholarship Fund\*  
 Michael Paul Haag Family 4-H Beef Scholarship  
 Miss T. Memorial Scholarship Fund  
 Mt. Pleasant Church of the Brethren Scholarship Fund



Nancy Jaynes Memorial Scholarship Fund  
 Nathan Collins Memorial Scholarship Fund  
 Neil Germann Memorial Scholarship Fund  
 Nicholas Vogeler Memorial Scholarship Fund  
 Nilas Cretcher Memorial Scholarship Fund  
 Ogden Fund  
 Ounce of Prevention Scholarship Fund  
 Palbykin Aviation Scholarship Fund  
 P.H.S. Business Scholarship Fund  
 Phoebe Heishman-Lykowski Scholarship Fund  
 Plymouth Community School Corporation Scholarship Fund  
 Plymouth Fireman's Memorial Scholarship Fund  
 Plymouth Masonic Scholarship Fund  
 Plymouth Optimist Club, Inc. Scholarship Fund  
 Purdue Alumni Club of Marshall County Scholarship Fund  
 Quincy A. Troup 40 Scholarship Fund  
 R. B. Krueger Memorial Scholarship Fund  
 Ralph and Louise Mason Scholarship Fund  
 Ray L. Price Memorial Scholarship Fund  
 Ray Martin Memorial Fund  
 Read Wrestling Scholarship Fund  
 Rev. J. Robert Boyer Memorial Scholarship Fund  
 Ritter Family Memorial Scholarship  
 Robert and Helen Widmar Scholarship Fund  
 Robert and Marian Hileman Scholarship Fund  
 Robert E. and Helen L. Kirkley Memorial Scholarship Fund  
 Robert P. Pickell Memorial Scholarship  
 Robert Warner Kurtz Memorial Scholarship Fund  
 Roger Laramore Memorial Scholarship Fund  
 Rue Dee Marker Memorial Scholarship  
 Russ Teall Track and Field Memorial Scholarship Fund  
 Russell and Audrey Feldman Memorial Scholarship Fund  
 Ruth Shanks Memorial Scholarship Fund  
 Ryan M. Heintzelman Scholarship Fund  
 Ryan Unsicker Memorial Scholarship Fund  
 Sally Overmyer Memorial Scholarship Fund  
 Samuel Elliott Perkins IV Memorial Scholarship Fund  
 Sanford O. Jacox Memorial Scholarship Fund  
 SGM Jeffrey McLochlin Memorial Scholarship Fund  
 Sgt. Jason Nemeth Memorial Scholarship Fund  
 St. Michael Athletic Association Scholarship Fund  
 Staff Sergeant Justin DeCrow Memorial Scholarship Fund  
 Stephen P. Jeffirs Scholarship Fund  
 Stephen Wayne and Marian Munn Agriculture Scholarship Fund  
 Stouder Scholarship Fund  
 Timothy J. Hochstetler Memorial Scholarship Fund  
 Todd W. Edwards Memorial Scholarship Fund  
 Tony and Mary Wood Scholarship Fund  
 Tri Kappa Beta Delta Chapter - Plymouth Tri Kappa Scholarship Fund  
 Triton Education Foundation Fund  
 Vera R. Klinedinst Memorial Scholarship Fund  
 Walter A. Glaub/Marshall County Industrial Assoc. Scholarship Fund  
 Wayne G. Pippenger M. D. and Gladys Pippenger RN Nursing Scholarship Fund  
 William E. Shemberger Music Scholarship  
 Wilma Martin Scholarship Fund  
 Zane and Zoie Triplet Memorial Scholarship Fund







## YOUTH AND FAMILY

Aim Straight Marriage and Family Fund  
 B.E.A.M. Youth Philanthropy Donor Advised Fund  
 B.E.A.M. Youth Philanthropy Fund\*  
 Bicycle Helmet Fund\*  
 Boy Scouts of America, LaSalle Council Fund  
 Culver Boys & Girls Club Flexible Non-Permanent Fund\*  
 First United Methodist Church of Bourbon/Bashor Home Fund  
 Friends of the Culver Youth Center Fund  
 James and Debra Read Marshall County 4-H Endowment Fund  
 James H. Neu Fund  
 Kenneth and Ruth Gilbert Family Fund  
 Missman Family Fund  
 National Youth Service Day Fund\*  
 Pendergast-Rosander-Nye Fund  
 Wilma and Nelson Leman Athletic Endowment Fund  
 Youth Leadership Marshall County\*

\*Non-permanent fund



# VOICES OF LEADERSHIP

While We are Individually Strong, We are Collectively Powerful.

In a year like none other, annual meetings for the Community Foundation and United Way were held together and virtually for the first time on December 3, 2020. While separate organizations each with their own board of directors, the Foundation and United Way are unique in sharing staff and space at the Marshall County Philanthropy Center. Both organizations share interest in serving the philanthropic needs of the community, bringing together people and resources to strengthen and build more vibrant, more resilient communities.

The annual meeting marked Day 272 since the first Indiana Public Health Emergency was issued. As the evening began, thoughts turned to how everyone has been impacted by the pandemic but in many and often deep and different ways. The conversation shifted to voices of hope and leadership and a recognition of so many who stepped up to help, who banded together with vision, courage, innovation, and collaboration.

Claudia Cummings, President and CEO of Indiana Philanthropy Alliance, and Rachel Scott, Chief Strategy Officer, Indiana United Ways, spoke about the servant leadership they recognized in Marshall County through the work to become a Stellar community and how that forged the strength to respond to COVID-19.

## SPECIAL LEADERSHIP RECOGNITIONS



### Marshall County Nonprofit Organizations

For their impressive and commendable dedication and commitment to help and their creativity and persistence in adapting so they could continue to safely serve so many Marshall County residents.



**Kevin Overmyer, President,  
Marshall County Commissioners**  
**Ginny Munroe, President,  
Culver Town Council**

For their exemplary leadership in forming the Marshall County Crossroads team, achieving the 2019 Indiana Stellar Designation, and spearheading the creation of a Marshall County Quality of Life plan that will guide comprehensive community development including arts and culture, education, and health and wellness initiatives for the next twenty years.



**Kreg Gruber, Chief Executive  
Officer, Beacon Health System**  
**Dr. Jason Marker, Associate  
Director, Memorial Hospital**

For their leadership in securing Health Resources and Services Administration planning and implementation grants totaling \$1,050,000 to address substance use disorders and for their engagement of 19 organizations and more than 45 community leaders in this effort. Dr. Marker was an exemplary leader throughout and Project HOPE officially launched coordinated efforts in September 2020 for prevention, treatment and recovery services, helping those with addiction and their families connect with critical supports.



**Chad Towner, President / CEO  
Saint Joseph Health System**

For his outstanding leadership, passion, and courage to serve as a reliable and credible source of information as the world learned more about COVID-19. Chad's daily updates and town hall meetings with community leaders were visible manifestations within the region of his leadership at the national, state, and local level to educate and respond to the virus. For many, his voice broke through the noise and confusion and brought calm and clarity even when the messages were alarming and difficult to hear. Many thanks to Chad and his leadership team including Loretta Schmidt, Eric Holsopple, and Michelle Peters for their truly amazing leadership in these outreach efforts.

Our heartfelt admiration and deep thank you to all healthcare professionals and support teams that are represented by the remarkable leaders at Beacon Health Systems and Saint Joseph Health Systems. You are all special heroes in this fight and we are grateful.



# FRIENDS OF THE FOUNDATION AWARD AND TOCQUEVILLE SOCIETY AWARD



## **John J. Oliver, President, U.S. Granules**

John's generous leadership and investment in Marshall County communities is deep and is well reflected in his relationships with the Community Foundation and United Way. Among the many examples are support of the Daniel Tyree Academic Scholarship Fund and the John J. Oliver Speech and Debate Fund, and projects like the REES Theater. This year we particularly recognize the incredible 2015 investment by the Daisy and John Oliver Family in the Saint Joseph Hospital Emergency Department. This support helped equip and prepare the hospital with better, more efficient and safe space for staff and patients.

John's exceptional leadership spurred the extraordinary Fund the Essentials Campaign in partnership with the Marshall County Crossroads team. He brought his concerns along with creative and practical ideas on how it might be done at a time of global uncertainty.

John was presented the Friends of the Foundation Award from the Foundation, marking only the third time this award has been issued since inception in 2003. John was also recognized as a member of the United Way Tocqueville Society, the first Marshall County resident to achieve this distinction.

In his honor, the community rooms at the Marshall County Philanthropy Center are now named the John J. Oliver Community Rooms. These rooms are designed to connect and nurture community leaders and those vital collaborations that will move our communities into the future.



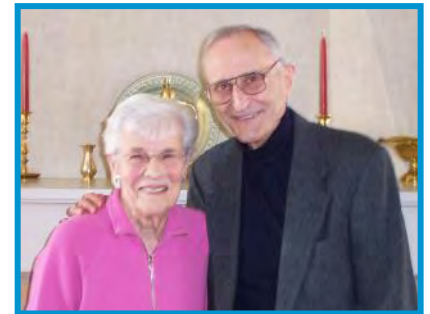
**Daisy and John L. Oliver Plymouth Medical Center Emergency Room** located at the Plymouth campus of the Saint Joseph Health System.





### **June and Will Erwin**

June Erwin, a founding Community Foundation board member from 1991-1993, quickly connected her husband Will to the Foundation. Combined, their contributions as board members were influential over the next eleven years with Will serving as president from 1998-2000. June and Will were generous supporters of the Foundation, starting thirteen endowment funds over the years.



In his 1999 Foundation President's Report, Will wrote, "As we look back at our visionary founders and say, thank you and well done, we must also look at the future needs of our communities and see that our work has just begun. . . . If Marshall County is to keep the young people we raise and educate, we need the stabilizing influence of a strong and growing community foundation to support a richer quality of life."

In recognition of all that June and Will Erwin mean to our communities and to the Foundation family, past board and committee members, grant recipients and those people they surprised with an endowment fund in their name, a tree will be planted at the Marshall County Philanthropy Center honoring their lives and careers that were distinguished by service, innovation, and imagination.

Contributions in their memory may be made to the June and Will Erwin Community Fund at the Marshall County Community Foundation.

### **John "Jack" Oliver, Jr.**

The Marshall County community was heart-broken to lose Jack Oliver in 2020 to COVID-19.

In 2014, the Oliver Family members were the recipients of the Indiana Volunteer of the Year award for Marshall County. For the Oliver Family, Jack and Jana, and their children John and Jennifer and Jessica, giving back to the community is "just what you do." Collectively and as individuals they are inspiring examples of business and charitable leadership.

Jack built a legacy encouraging others to make a difference. Starting in 2020, United Way will issue "Inspired to Give 100% Awards" reflecting the legacy of John "Happy Jack" Oliver. These awards to companies that achieve that goal embody the values that Jack lived, shared, and fostered with his biological family and his work family too.





# MARSHALL COUNTY COMMUNITY FOUNDATION, INC.

## SELECTED FINANCIAL INFORMATION STATEMENTS OF ACTIVITIES AND NET ASSETS FOR THE YEAR ENDED JUNE 30

<b>REVENUE:</b>	<b>2020</b>	<b>2019</b>
Contributions	\$ 1,276,190	\$ 1,040,482
Donated Services, Facilities & Gifts In-Kind	1,236	21,118
Rent Income	103,935	8,661
Loss on Disposal of Assets		(2,454)
Administrative Fee Income	310,810	337,019
Investment Return (loss), net	(234,102)	1,321,812
Miscellaneous	2,500	850
Change in Value of Split Interest Agreements	<u>29,052</u>	<u>(12,878)</u>
	1,489,621	2,714,610
<b>EXPENSES:</b>		
Program Services	1,663,257	1,342,874
Management and General	242,022	175,905
Fund Raising	<u>80,666</u>	<u>58,629</u>
	<u>1,985,945</u>	<u>1,577,408</u>
<b>Change in Net Assets</b>	(496,324)	1,137,202
Net Assets at Beginning of Year	<u>30,829,349</u>	<u>29,692,147</u>
Net Assets at End of Year	<u>\$ 30,333,025</u>	<u>\$ 30,829,349</u>

### STATEMENTS OF FINANCIAL POSITION AS OF JUNE 30

	<b>2020</b>	<b>2019</b>
<b>ASSETS:</b>		
Cash, Receivables and Other Assets	\$ 2,088,608	\$ 1,316,170
Investments and Charitable Remainder Trusts	34,534,411	36,193,448
Property and Equipment - Net	<u>267,023</u>	<u>272,405</u>
<b>TOTAL ASSETS</b>	<u>36,890,042</u>	<u>37,782,023</u>
<b>LIABILITIES:</b>		
Agency Liabilities	5,510,673	5,818,652
Other Liabilities	<u>1,046,344</u>	<u>1,134,022</u>
<b>TOTAL LIABILITIES</b>	6,557,017	6,952,674
<b>NET ASSETS:</b>		
Without Donor Restrictions	1,495,388	1,467,506
With Donor Restrictions	<u>28,837,637</u>	<u>29,361,843</u>
<b>TOTAL NET ASSETS</b>	<u>30,333,025</u>	<u>30,829,349</u>
<b>TOTAL LIABILITIES AND NET ASSETS</b>	<u>\$ 36,890,042</u>	<u>\$ 37,782,023</u>

The selected information listed above has been derived from financial statements audited by Estep Burkey Simmons LLC. Copies of the complete financial statements and related notes are available by contacting the Marshall County Community Foundation, Inc. office.

# STAFF MEMBERS

## **LINDA YODER**

Executive Director  
lyoder@marshallcountycf.org

I am inspired by the vision, energy, generosity, and compassionate actions we are privileged to witness every day. That, along with the deep friendship and satisfaction that comes from working together for the common good, are the greatest measures of hope for the future.

## **ANGELA RUPCHOCK-SCHAFFER**

Director of Community Impact and Communications  
arschafer@marshallcountycf.org

The impact of the Community Foundation is seen in the life stories of our area's families. It has been a particular honor to be part of local COVID-19 Community Response and Recovery work in 2020.

## **JAYNE ROAHRIG**

Resource Development Specialist  
jayne@marshallcountycf.org

Scholarships for our students and Community Fund grants touch and help so many people in our community. That is what the Community Foundation's mission is about.

## **TAMMY HOUIN**

Director of Accounting and Finance  
thouin@marshallcountyuw.org

I love going to work each day at the Community Foundation knowing that what we do today will make Marshall County a better place to live tomorrow. Our kids deserve that from us.

## **NAOMI ENAMORADO**

Accounting Assistant  
nenamorado@marshallcountycf.org

Millions of dollars in grants and scholarships are being invested back into Marshall County to make it a better place for all. Our generous donors are the reason why!





# JOHN MARSHALL LEGACY SOCIETY



When you make a planned gift, you are choosing to leave a legacy. The Foundation established the John Marshall Legacy Society to honor planned gift donors. Planned giving donors understand the power of endowment and know that the assets given to the Foundation will continue to grow and support good works for generations to come.

John Marshall served on the United States Supreme Court. His tenure as Chief Justice (1801–1835) produced decisions that became fundamentals of U.S. law. Chief Justice Marshall accomplished much during his life and, by his actions, left a positive legacy affecting generations far beyond his lifetime. Marshall County was named in his honor.

If you would like to discuss making a planned gift and becoming a member of the John Marshall Legacy Society, or if you have questions about the best way for you to benefit through a planned gift, please call us at 574.935.5159. We would love to meet and talk.

Members of the John Marshall Legacy Society are invited to take advantage of the following opportunities

- Your planned gift could include an IRA, a charitable gift annuity, an insurance policy, securities, retirement assets, real estate or a gift bequest in your will or testamentary trust. Together, we can select the right fit for you and your family.
- Name your charitable fund to honor your loved ones. (\$5,000 minimum required for a separate fund. Lesser amounts welcome for existing funds.)
- Share your personal history through stories and photographs for future generations who will receive grants from your fund.
- Attend special events designed for generous people who have provided for the Marshall County Community Foundation in their estate plans.
- Receive recognition in Community Foundation publications so that others might follow your example of community stewardship and leadership. (You may, of course, choose anonymity instead.)

## SOCIETY MEMBERS



- |                               |                                  |                               |
|-------------------------------|----------------------------------|-------------------------------|
| • Marjorie Ann Baker          | • Geraldine M. Keller*           | • Dorothy L. Peterson         |
| • Dr. Don S. and Sharon Balka | • Dorothy E. Kinney*             | • Ernie* and Bernie* Rightley |
| • Dr. David R. Barkmeier      | • Wilma S. Leman*                | • John Ringle*                |
| • Berniece Irene Burket*      | • Larry R. and Sherry Linhart    | • Jayne Roahrig               |
| • Ruth and Lawrence Castaldi* | • Dr. Vance F. Lopp*             | • Sam and Karen Schlosser     |
| • James R. Cook*              | • Jennifer S. Maddox             | • Harriett Sheetz*            |
| • Kurt W. and Chris Garner    | • Elizabeth S. Marshall*         | • Ralph C. Vonnegut, Jr.*     |
| • Gerald M. and Helen G. Hess | • Neva M. Mason*                 | • John and Beverly J. Wien    |
| • Mary E. Hission*            | • Floyd R. Mattix*               | • Linda K. Yoder              |
| • Inez Humbert*               | • Herman and Florence Mattix*    |                               |
| • Scott Joyner                | • Samuel E. and Mary C. Perkins* |                               |

\*Deceased

# GIFT VII 2:1 MATCH

## YOUR DONATION OF ANY SIZE TRIPLES!

Lilly Endowment Inc. is providing an exciting match – GIFT VII – to help build Community Foundation Funds.

From now through September 30, 2021, Lilly Endowment Inc. will match all gifts to the Community Fund with two dollars for every dollar contributed, up to \$500,000.

Unrestricted endowment funds, we call them Community Funds, are the most flexible and responsive funds at the Foundation in addressing current and emerging needs. Grants from Community Funds support projects focusing on the arts, education, health and human services, recreation, building quality of life, and the environment.

### HOW THE MATCH WORKS

- Before September 30, 2021, make a gift or pledge to the Community Foundation's Community Fund.
- Irrevocable pledges for multiple-year contributions qualify and must be paid by December 31, 2022.
- Lilly Endowment Inc. will match that gift 2-to-1, tripling its value. For example, your \$100 gift will draw \$200 in matching dollars—a total benefit of \$300 to support Marshall County communities!

### HOW TO GIVE

- Give online by credit card at [www.marshallcountygives.org/GIFTVII](http://www.marshallcountygives.org/GIFTVII).
- Give by check, noting "GIFT VII" in the memo line. Mail to PO Box 716, 2680 Miller Drive, Suite 120, Plymouth, IN, 46563, or stop by during office hours: Monday – Friday, 8:00 a.m. to 5:00 p.m.
- Gifts of IRA assets, appreciated stock, or life insurance are welcome. Discuss various giving options with your financial planner or have them contact us at 574.935.5159.

*Your gift maximizes the seasons for those living in Marshall County!*

*Your generosity changes lives. Your legacy is forever.*

