





















## MARSHALL COUNTY COMMUNITY FOUNDATION

ANNUAL REPORT 2021







## FROM THE EXECUTIVE DIRECTOR'S DESK

Since 1991, the visionary leadership of our Founders has built a thriving community foundation that is a leader, innovator, convener, and proud supporter of our people and communities. This annual report marks the 30<sup>th</sup> anniversary of the founding of the Marshall County Community Foundation. We have much to celebrate.



Traditionally, the gift for a 30<sup>th</sup> anniversary is the pearl. Natural pearls are among some of the most coveted gems in the world. History teaches that pearls are the ultimate symbol for wisdom. The donors to the Foundation build upon the wisdom of past generations, preparing for the next.

Similarly, the Marshall County Community Foundation assists with hundreds of community needs, supporting nonprofits and students, catalyzing opportunities, building a legacy of philanthropy – layer by layer. The Foundation's story of impact in Marshall County is continuously being developed – gift by gift, grant by grant.



**Linda Yoder** Executive Director

A pearl is created as layer upon layer of fluid are formed to protect an oyster, mussel, or clam from an irritant. Naturally occurring pearls can take years to fully develop, as layers of coating build up to create a stunning gem. What a beautiful way to describe 30 years of thoughtful philanthropy in Marshall County!

The Foundation is honored to be faithful stewards of your donations. Pearl jewelry is often passed as heirlooms from generation to generation in a family. A necklace or bracelet reminds us of a lost loved one. The Foundation's 'heirlooms' are not made up of pearl earrings or rings, but of gifts that donors wish to 'keep in the family' and help support the people and communities of Marshall County long after they pass.

We hope you enjoy the 2021 annual report and celebrate this important milestone year with us. Our commitment to stewardship as your trusted investors and opportunity connectors is as strong today as it was on day one in 1991.

We look forward to another 30 years of consistent growth and increasing reach and impact on the communities we call home.

All the best,

Jude K Yoder

## TIMELINE of The Marshall County Community Foundation

**1990** - Lilly Endowment launches GIFT (Giving Indiana Funds for Tomorrow) initiative to establish or strengthen community foundations in Indiana.

1991 - On February 19, 1991, the Marshall County Community Foundation (MCCF) was established as a 501(c)(3) not-for-profit organization.

1992 - Kiwanis Club of Plymouth establishes the first endowment fund with the MCCF and leads to a total of 34 endowment funds by 1995.

# CELEBRATING 30 YEARS OF THE MARSHALL COUNTY COMMUNITY FOUNDATION

In 1990, Jan Garrison organized a series of meetings and an evaluation committee of community leaders to discuss the concept of a community foundation for Marshall County. A leadership team formed. A legacy was begun. The Marshall County Community Foundation was formed in 1991. Thirty years later, we laud our beginnings and look to the future.

The Foundation became a catalyst to unite Marshall County. We salute the courage and vision of the Founding Members and Donors to the Foundation.

A hallmark of the American experience has been our enduring belief that a group of committed citizens can make a difference. The Marshall County Community Foundation embodies the highest ideals of the American people: our collective commitment to serving others and creating a better world for all.

Facts and figures show our tremendous growth. Even more compelling are the stories of individuals and families, of donors and grant recipients, of community leaders and volunteers. We are touched by why and how people give and by how those gifts have impacted the lives of so many through education, arts and culture, health and human service, environmental and community projects.

As we wrap up our 30<sup>th</sup> year, we feel more connected to Marshall County than ever. We are honored to be your community-minded partners and trusted stewards of your donations and gifts. We are as committed as ever to steadfastly connect exciting opportunities with the visionary thinkers and do-ers of Argos, Bourbon, Bremen, Culver, LaPaz, and Plymouth.

For now. Forever. Helping great ideas take flight. Thank you.



Dr. Jim White, President Mark Feldman, Secretary/Treasurer Kevin Berger Kevin Boyer Joan Hunt

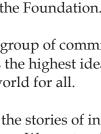
Jennifer Hurford Jack Jordan Adam Lukenbill Karen Schlosser **Beth Styers** 



1993 - Sylvia Bieghler hired as first Executive Director.

1995 - R. Jeffrey Honzik hired as second Executive Director, establishing a working relationship between the MCCF

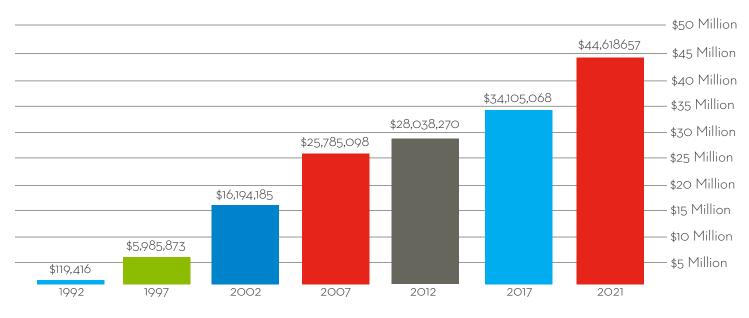
and the United Way of Marshall County (UWMC) under one management team.







# MARSHALL COUNTY COMMUNITY FOUNDATION HISTORICAL ASSETS BY YEAR



## FOUNDING AND FIRST BOARD MEMBERS

Rob Bowen Cecil Burket Dean Byers Everett D. Colvin, Vice President Dale Cox Rev. Mark Day Karen Dehne, Treasurer Greg Downes June Erwin Jan Garrison, President David Gibson Dr. Kent Guild Sister Virginia Kampwerth Ronald Gifford Betty Laramore, Secretary Charles Lewallen Sally Manuel Angela Mason V. Richard Miller Everett Missman Roger Moynahan Alice Neal Paul Pare Melba Reese Phil Reidenbach Dan Schmelter Charles Schramm Jean Seltenright Bruce Stauffer Tom Steffen Gordon Taiclet Jean Williams

## PRESIDENTS OF THE MARSHALL COUNTY COMMUNITY FOUNDATION

Kevin Boyer, Bourbon William Erwin, Bourbon Jan Garrison, Plymouth Jerry Gates, Argos David Gibson, Plymouth Elwood "Bud" Hillis, Culver Tammy Houin, Plymouth Bruce Jennings, Bremen Patricia Kitch, Bourbon Louise Mason, Bourbon Capt. William Pippenger, Culver Tom Stiles, Bremen Gordon Taiclet, Argos Dr. Jim White, Bremen (current President) John Zeglis, Culver

1995 - The MCCF and UWMC begin a strategic program, Leadership Marshall County, to fill an existing vacuum of leaders

and potential board members for various organizations in the community.

1996 - The MCCF completes the Lilly Endowment GIFT II Initiative, ensuring the Foundation's future.





Hope Jordan Amor 2011 Recipient of Lilly Scholarship Principal, LaVille Elementary

Since 1998





Congratulations to the 2021 Lilly Endowment Community Scholarship Awardee, Mark Bahr, of Bremen High School.

# THE POWER OF SCHOLARSHIPS

When asked about her new role as the Principal for LaVille Elementary, Hope Amor shared, "This is exactly what I want to do, and exactly where I want to be." Amor is coming home to teach and lead in Marshall County after receiving the Lilly Endowment Community Scholarship in 2011 to study at DePauw University.

Hope Jordan Amor is a proud graduate of Bremen High School. After completing her studies at DePauw, she went on to earn a Masters of Arts in Teaching at Marian University and a Masters in Education Administration at Butler University. Along the way, Amor discovered her heart and passion was in elementary education.

All of that education began with the promise of the Lilly Endowment Community Scholarship administered by the Foundation.

"I am forever grateful for the Foundation's scholarship committee. "They believed in me as a high school senior. I feel like they still believe in me today. They opened the doors to my education, for me to eventually be able to give back to the community I love."

Being close to family is important to Amor, so when the LaVille Elementary Principal position opened up, she pounced. It was her 'unicorn job' – perfect in all aspects. Both Amor and her husband grew up locally, and returning to Marshall County to continue her career and settle down as a family was important to the couple.

The United Way of Marshall County recently welcomed Amor as a new Board member, a position she is excited to make an impact in. "Teachers have a unique partnership with United Way. We see the struggles of our students and their families first-hand," Amor said. "I'm honored to be able to focus on serving the kids and community I know and love."

**1996** - The City of Plymouth establishes a one million dollar endowment in the MCCF, the first municipality in the State of Indiana to do so. **1998** - The Leman family establishes the largest single gift (at that date) by creating three Charitable Trusts.





1999 - The MCCF successfully completes Lilly Endowment GIFT III, a \$1 million initiative.
2000 - The Foundation successfully completes Lilly Endowment GIFT IV, a \$1.4 million initiative.
MCCF assets reach \$15 million with 150 separate funds.

# KEEPING THE MAXINKUCKEE DREAM ALIVE

In the spring of 2021, a grant from the Ralph C. Vonnegut Jr. Fund was awarded to the Lake Maxinkuckee Environmental Fund (LMEF) to purchase equipment for water sampling and monitoring.

The high-quality equipment means the LMEF can monitor nutrient loading from three main tributaries and additional smaller ones into Lake Maxinkuckee, measuring more frequently and at more sites than previously. If something concerning is found, the results are taken to a lab for further study and possible action.

"Historically, we contracted with businesses to monitor Lake Maxinkuckee and her waters," said Debbie Palmer, President and CEO of LMEF. "Monitoring more often now means more data and opportunities to protect Lake Maxinkuckee. It also means that we need more volunteers for our work!"

When the LMEF asked for volunteers to help with the water sampling, Ginny Vonnegut Hahn stepped up – a niece of Ralph C. Vonnegut Jr. She commented that she was initially intrigued to volunteer because the money for the grant came from her uncle and his fund at the Foundation.

Hahn first came to Lake Maxinkuckee as an infant in 1962, when her family would spend two weeks vacation there every summer. Now her children are the 5<sup>th</sup> generation of the Vonnegut family to enjoy Lake Maxinkuckee and its waters.

"Our generation of Vonneguts most definitely feels the same connection to the lake as previous generations did," said Hahn. She hopes that her children will come for years to come, introducing the next generation of the family to the magic that is Lake Maxinkuckee. She added, "We feel so blessed to be part of a long line of family who have enjoyed this lake and we don't want to take it for granted."

Hahn's cousin, Nonie, recently shared that her father (Ralph C. Vonnegut Jr.) would have been proud to know that his niece was helping preserve the beauty of Lake Maxinkuckee, a place that was so special to him.

Palmer said that the new monitoring equipment is a game-changer for the LMEF. "We got a great response

from volunteers to help us with this effort," she added. "Being out on the water, doing what we love, and introducing even more people to our mission to preserve Lake Maxinkuckee – and how to pass on this beautiful treasure to the future – is the reason why the LMEF is here, after all."



"That is good that you two are keeping the Maxinkuckee dream alive. That will always be an enchanted body of water to me, my Aegean Sea, perfect in every dimension."

## - Kurt Vonnegut Jr. to his cousin, Catey Rasmussen, 1977

2002 - Lilly Endowment, Inc. awards MCCF a \$4.1 million CAPE (Community Alliances to Promote Education) Grant - the largest single grant

to date given, public or private, to the MCCF; Ancilla College serves as fiscal agent.

2003 - Golden Girls Scholarship Fund established in memory of Wilma Leman and the Golden Girls.

# COVID-19 PANDEMIC

The COVID-19 pandemic has been part of our lives for the better part of two years. The pandemic response has been a focus of the Marshall County Community Foundation since March 2020.

When the pandemic first hit, while much of the world shut down, the Foundation and many others in the philanthropic sector got to work. On March 16, the 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 every city, town, and geographic corner, from the Foundation, United Way, and the Marshall County Crossroads team. They continue their work still.

The Fund the Essentials campaign raised a remarkable \$524,389.24 to support COVID-19 response work in Marshall County. Economic Relief Initiative grants from Indiana United Ways through Lilly Endowment Inc. funding brought \$410,000 to help stabilize the community.

By June 30, 2021, Rapid Response grants were awarded to 35 Trusted Community Partners that provided assistance to households impacted by COVID-19. The Foundation invested hundreds of thousands into Marshall County to help keep local families afloat. In addition to Rapid Response grants, special consideration was given during the Foundation's Community Fund grant rounds to requests actively addressing the local fallout of COVID-19.

Local food pantries received funding to keep shelves stocked. Mental health groups were given aid to help those struggling with the emotional toll of the pandemic. Schools and nonprofits received grants to purchase personal protective equipment. Housing and utilities assistance was prioritized to help keep residents safely in their homes amid job loss and uncertainty.

After a grueling year, vaccines provided a glimmer of hope. Working in partnership with the Marshall County Crossroads team, the Marshall County Health Department, and area health systems, the Foundation continues to help share information about vaccine availability, clinics, and updates on booster shots.

But while celebrating amazing progress in fighting COVID-19, victory can not yet be claimed. Friends and neighbors are still getting sick; families are still losing loved ones. Businesses are struggling to find workers and stay open amid supply chain issues. Local nonprofits are again seeing an increased need for their services. Many students are struggling after prolonged periods of remote learning. The list goes on. While attention may have shifted away from "Rapid Response," the Foundation is planning for the future. How will the Marshall County community recover, respond, reimagine, and rebuild?

The fight against COVID-19 is not over. There is plenty of work to do. We know there is hope and opportunity. It is through generous donors and collaborative community leaders that, together, we will make our communities stronger and more resilient.

# TEACHING THE NEXT GENERATION OF NURSES IN MARSHALL COUNTY

A grant of \$25,000 from the Community Fund is supporting the creation and growth of a new nursing program at Marian University's Ancilla College (MUAC) in Marshall County.

The Foundation grant is helping build the MUAC nursing skills lab, re-creating real-world situations nurses would encounter upon graduation. An infant simulation mannequin teaches students to make clinical decisions in a safe manner, experiencing what checking a child's pulse, heart rate, and other vital signs would be like in the hospital setting.

"Seeing the opportunities available in Marshall County for nursing students, it's very exciting," said Dr. Dorothy Gomez, the Dean of Marian University's Leighton School of Nursing and Associate Professor. With her extensive history of instruction in undergraduate nursing, Dr. Gomez believes the MUAC nursing program will bring that something 'extra' to future nurses.

Nursing students will thrive in the small class sizes and faith-based, family-friendly environment fostered at Marian University's Ancilla College. And, most importantly, they will build solid relationships with their teachers in the tight-knit program, constantly challenged as students to become the best nurses they can be.

The Community Fund grant supported MUAC in getting accreditation for the nursing program. Expanding the program to a four-year degree is an important step towards helping alleviate the national nursing shortage – a shortage that is often more acute for rural communities like Marshall County.

"Nurses are unique in their ability to respond to the health needs of their community. The Foundation is making an early investment in this new nursing program. An investment that will build the strength and the health of Marshall County far into the future."





2003 - MCCF successfully completes Lilly Endowment GIFT V, a \$1.8 million initiative.

2007 - The Ralph C. Vonnegut, Jr. Fund established with a Charitable Remainder Unitrust.

2007 - Jennifer S. Maddox hired as new MCCF Executive Director.



"We're here to make people's lives better. I love what I do and the clients I get to spend my days with. They're incredible people. We are lucky to have them as members of our community."



# GROWING THE MISSION

When you walk into the new Corvilla building in Bremen, artwork and smiles greet you. A large and sunny space invites the visitor in. Corvilla provides life-enhancing services to enrich the lives of individuals with intellectual and developmental disabilities while encouraging respect and dignity in the communities in which they live.

"Ultimately, we want our clients to go home with a sense of pride and accomplishment," said Joe Paris, Director of Day Services for Corvilla. A 2021 Community Fund grant helped Corvilla purchase a washer, dryer, refrigerator, stove, and a commercial kiln to better serve their clients.

The new appliances and kiln will support multiple aspects of Corvilla's mission. The Bremen Corvilla site offers a comprehensive day program and serves as a hub for Supported Living and Employment Services in Marshall County. An art storefront features unique one-of-a-kind artisan pieces available for sale made by the people Corvilla serves.

When a Corvilla client sells a piece of their art, 50 percent of the sale is paid directly to the artist who made it and the other 50 percent goes into the purchase of more supplies. Each piece is as unique as the individual who made it. With daily scheduled activities, Corvilla creates a positive atmosphere where clients feel safe and engaged. Corvilla encourages client participation and leadership in daily events. Everyone can choose what activities they want to participate in, resulting in a meaningful and productive day.

"The exciting thing is being able to offer programs and opportunities that help our clients develop life skills," Paris noted. "We are grateful for the welcome we have received from the Marshall County Community Foundation and this grant. I see the results of your investment every day, and let me tell you, it's incredible."

2008 - Largest MCCF grant awarded to date: \$250,000 to help build the Community Resource Center.
2008 - MCCF concludes the Generations Initiative. Twenty-one new funds were created between May 1, 2007, and June 30, 2008.

**2009** - Leadership Marshall County launches the Youth Leadership Marshall County program.





### Adam K. Lukenbill

Estate planning, farm and business succession planning, estate and trust administration, asset protection, and representation of closely-held businesses. Lukenbill & Lukenbill, LLP Attorneys at Law (Photo: Kayla Holderread)

#### Fiscal Year 2020-2021



# PROFESSIONAL ADVISORS: HELPING MAKE EFFECTIVE PHILANTHROPY POSSIBLE

The power of philanthropy lives strong in our Marshall County communities. So does collaboration! Professional advisors and the Foundation can be a win-win partnership in helping clients achieve their charitable goals and crafting "forever gifts" that will live on for generations.

Professional advisors include attorneys, accountants, trust officers, and estate and financial planners. Professional advisors help clients with important financial decisions. The Foundation can simplify their giving and amplify their impact.

"One of the first questions I ask is, 'Do you have any charitable intent? A nonprofit that has touched you or your family? A cause close to your heart,'" said Adam K. Lukenbill, a member of the Board of Directors for the Foundation, and an area attorney. "The answers are usually a great way to start a conversation about estate planning and my client's goals."

The oversight of donations made to the Foundation appeals to many of the donors that Lukenbill advises. An Investment Committee and the Board of Directors steward gifts to the Foundation and strive to ensure donations are as impactful decades into the future as they are today.

"When someone is thinking of their legacy, they want it to last. Whether their name is attached to a new scholarship or maybe a donor-advised fund, my clients are interested in making an impact," shared Lukenbill. "Frankly, there are few organizations that have the trust, oversight, and perpetuity the Foundation does. My clients want to know their gifts will continue to make an impact in Marshall County long after they are gone, supporting causes that are important to them."

> "It's that spirit of stewardship. I think that's what appeals to me the most. Inspiring philanthropy is a fantastic part of my job and one I look forward to each day."

2010 - MCCF introduces the Samuel Elliott Perkins IV Memorial Scholarship, offered annually to students from Marshall County who will attend Purdue University. The new scholarship fund is made possible by a 2002 Charitable Bequest of \$1.2 million.
 2011 - MCCF hires new Executive Director Linda K. Yoder.



In gratitude, we remember Legacy Society members Dr. David R. Barkmeier and Virginia Peterson, who passed away in 2021.

Their generosity will always be celebrated.

When you make a planned gift, you are choosing to leave a lasting legacy. The Foundation established the John Marshall Legacy Society to honor planned gift donors. Members of the Legacy Society have informed us of bequests, life insurance policies, trusts, and other end-of-life planned gifts, for the purpose of encouraging others to give back to Marshall County, her communities, and her people.

## JOHN MARSHALL LEGACY SOCIETY MEMBERS

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

Names in italics are deceased John Marshall Legacy Society members

## YOU CAN CREATE AN IMPACT NOW

Contributing from an IRA to a fund at the Marshall County Community Foundation – or creating a new one – is an easy way to reduce your tax burden and make a significant gift to support causes you care about.

For those 70 ½ or older, a gift from your IRA account to the Foundation can benefit your favorite charity. Gifts made from an IRA (up to \$100,000 per year) are not reportable as taxable income and qualify toward the required annual minimum distribution. An IRA Qualified Charitable Distribution may be requested for almost any type of fund.

The expertise of your professional advisor combined with the Foundation's community knowledge, pooled investments, flexibility to support charities, and anonymity (if desired) are a powerful way for you to create an impact.

Check with us or your professional advisor about your giving options, current or deferred, to maximize the benefits of your gift. Donations may be made through stocks, bonds, mutual fund shares, real estate, your will, retirement assets, life insurance policies, or other giving tools. We work with individuals, families, companies, and charitable organizations.

Call us at 574.935.5159. We would love to talk with you and help your ideas take flight.

**2012** - The sale of 160 acres of land for \$1 million from the estate of Elizabeth (Libby) Marshall benefits the Marshall County Historical Society and provides opportunity for significant increase to their endowment fund and establishment of a nonpermanent fund. Proceeds from the sale of Libby's home and an additional 61 acres of land establish the First United Church of Bourbon Endowment Fund.

# MARSHALL COUNTY COMMUNITY FOUNDATION, INC. SELECTED FINANCIAL INFORMATION

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

## **REVENUE: 2021**

Contributions Donated Services, Facilities & Gifts In-Kind Rent Income	\$1,405,155 l 1,255 112,596
Loss on Disposal of Assets	
Administrative Fee Income Investment Return (loss), net	311,443 7,204,413
Change in Value of Split Interest Agreemen	ts (68,075)
TOTAL REVENUE	8,966,787
EXPENSES:	
EXPENSES:	
EXPENSES: Program Services	1,350,226
	1,350,226 246,128
Program Services	
Program Services Management and General	246,128
Program Services Management and General Fund Raising	246,128 82,035
Program Services Management and General Fund Raising TOTAL EXPENSES	246,128 82,035 1,678,389

# STATEMENTS OF FINANCIAL POSITION AS OF JUNE 30

## **ASSETS: 2021**

	<b>**</b>
Cash, Receivables and Other Assets Investments and	\$2,577,853
Charitable Remainder Trusts	41,802,258
Property and Equipment - Net	238,546
TOTAL ASSETS	44,618,657
LIABILITIES:	
Agency Liabilities	6,239,427
Other Liabilities	757,807
TOTAL LIABILITIES	6,997,234
NET ASSETS:	
Without Donor Restrictions	1,814,451
With Donor Resrictions	35,806,972
TOTAL NET ASSETS	37,621,423
TOTAL LIABILITIES & NET ASSETS	\$44,618,657

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.

2012 - MCCF hosts 12-12-12, a 12 percent matched giving event for 12-hours on December 12, 2012. Heralded as the "single greatest day of giving in Marshall County," the event raised \$538,565 for endowment funds supporting more than 72 nonprofit agencies and charitable causes and including seven new funds.

2013 - Following a year-long process, MCCF hires Northern Trust as the new investment management team.





# COMMUNITY FOUNDATION

FUNDS LIST

\* Non-Permanent Fund \*\* Current as of June 30, 2021

## ARTS AND CULTURE

Antiquarian and Historical Society Endowment Fund Antiguarian 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 **REES Non-Permanent 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 and Randy Danielson Community Aesthetic Improvement Fund First Merchants Bank Community Fund Gibson Community Fund Gift Phase VII Board Engagement Grant Fund Gift Phase VII Implementation Grant 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 Embarg 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 Lifeplex Community Wellness Foundation Fund\* Marshall County Council on Aging Endowment 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 Dept. Fund Thornburg/Donnelly Fund United Way of Marshall County Endowment Fund United Way of Marshall County Non-Permanent Fund\*

## SCHOLARSHIPS .....

Fiscal Year 2020-2021

337 Scholarships Awarded to Marshall <sup>...</sup> County Students Fiscal Year 2020-2021



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 Coach Teall Memorial Scholarship Fund 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 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 Pfieffer 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 Plymouth High School 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 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 Thomas Clark Gibson Memorial 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 and 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\*

## 2021 NEW FUNDS

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GIFT Phase VII Board Engagement Grant Fund GIFT Phase VII Implementation Grant Fund Will and June Erwin Community Fund



# SPECIAL RECOGNITION

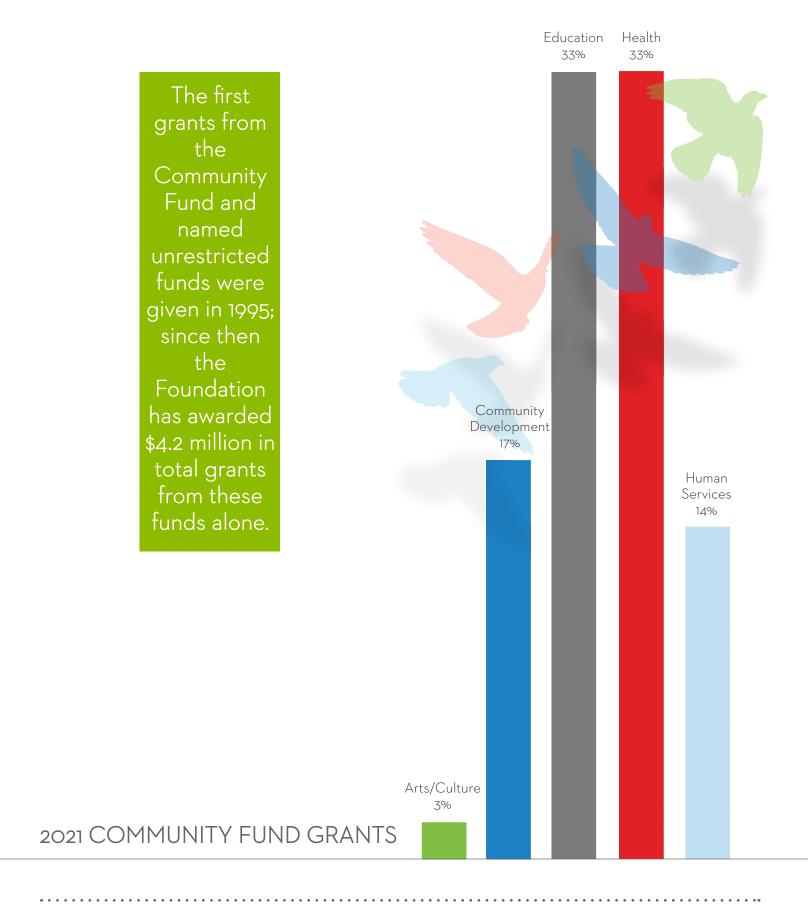
In addition to the Marshall County Community Fund, the following named unrestricted funds support competitive grant rounds in Marshall County. Thank you for your generous support to address ever-changing needs in the community, year after year!

Barbara and Ralph Winters Community Fund Billy and Vickie Ellinger Community Fund Brian and Patricia Kitch Family Community Fund C and M Overmyer Unrestricted Endowment Fund Eleanor and Randy Danielson Community Aesthetic Improvement Fund First Merchants Bank Community Fund Gibson Community Fund John and Kay Finlay Community Fund Paul and Carol Nye Community Fund Philip and Sylvia Bieghler Community Fund Will and June Erwin Community Fund

2014 - Lilly Endowment announces Lilly Endowment GIFT VI initiative; MCCF receives \$500,000 award to support 1:1 match

for unrestricted gifts and 1:2 match for restricted gifts.

2015 - Lilly Endowment GIFT VI match goal of \$250,000 for restricted gifts is achieved prior to first progress report to Lilly Endowment in July.



2016 - The MCCF successfully meets the Lilly Endowment GIFT VI match challenge.

2017 - MCCF May Match Madness giving event raises \$272,191 over the course of 25 hours, supporting 63 nonprofits and endowment funds.

2017 - The Town of Culver receives Indiana Stellar Communities designation; MCCF Community Fund grants support key Stellar projects.

## COMMUNITY FUND GRANTS

Of the 383 funds at the Foundation, Community Funds are the most flexible and responsive in seizing our community's most compelling opportunities or responding to the most pressing needs. Grants from Community Funds are awarded two times per year through a competitive application process.

Fall 2021 \_\_\_\_\_

- Bremen Community Cares: \$20,000 to purchase a chair lift to help meet American Disabilities Act requirements for the Bremen Community and Performing Arts Center.
  Culver Park Department: \$10,000 to upgrade existing public basketball court with new recreational options allowing diverse engagement across ages, physical abilities, and mobility levels.
  Drew's Gift of Music: \$5,000 toward refurbishing and procurement of instruments for children in need and to help promote music education for local schools and communities.
- Marshall County Historical Society: \$8,927 to purchase technology that will help improve audio-visual systems.
- Servants at Work (SAWS): \$3,200 to build ADA compliant wheelchair ramps for Marshall County residents.
- **WNIT:** \$2,500 to support the Education Counts Michiana Program that works to strengthen education and economic systems.
- **Wythougan Valley Preservation:** \$7,000 to create interpretive signs and historic markers to help the community and visitors understand and honor Marshall Country history.

Fiscal Year 2020-2021

\$213,713

Awarded in Community Fund Grants

Multi-Year Grants \_

\$12,500 from Community Funds for Marshall County Crossroads Stellar projects.

**\$20,000** to the Rees Theatre for the purchase of an Ultra HD LED Display Screen (NEW). Total grant award \$60,000.

**\$25,000** to Marshall County Crossroads Regional Planning for a multi-year and county-wide systems approach to health and well-being (NEW). Total grant award \$100,000.

2019 - With multiple community partners, the Foundation helped catalyze a Regional Cities and New Market Tax Credit project

with its first local impact investment and brought to the county a new high quality child care center and aquatics center.

**2019** - MCCF moves to new offices that share the building with a child care center.



2019 - The Indiana Office of Community and Rural Affairs, along with Lieutenant Governor Suzanne Crouch, selects Marshall County Crossroads as the 2019 Stellar Communities designee. MCCF serves a convening role and supports the application. The region, which includes all of Marshall County, as well as the towns of Argos, Bourbon, Bremen, Culver, LaPaz and Plymouth, will receive more than \$13 million in grants from various state agencies to implement its regional development plan.

## SPRING 2021

**Big Brothers Big Sisters Southern Lake Michigan Region:** \$15,000 to support youth mentoring program for elementary and middle school students at Culver Community Schools.

Boys & Girls Club of Marshall County: \$9,935 to support the CODE in CLASS (CiC) program.

**Corvilla Inc.:** \$5,760 to purchase appliances and commercial kiln for new Bremen location providing care for adults with disabilities, day and employment services, and supported living services.

**Culver Community Schools:** \$2,500 to provide materials and supplies for childcare program at Culver Community Schools.

**Dustin's Place:** \$14,750 for start-up and expansion costs for staffing, storage facility, and a family check-in station.

Marian University's Ancilla College: \$25,000 to support new four-year nursing program.

- **Marshall County Neighborhood Center:** \$15,000 to operations support for food/clothing/household pantry providing basic needs to vulnerable families.
- **The Time is Now:** \$2,150 to support start-up costs for new support center assisting survivors of human trafficking and domestic violence.

Tippecanoe Improvement Association: \$22,500 to support community park development project.

United Way of Marshall County: \$10,000 in support of the Marshall County Blue Zones

Phase 1 Community Development and Readiness Assessment.

Multi-Year Grants

**\$10,000** was awarded from Community Funds for the Marshall County Crossroads Stellar project for Culver biking/walking trails and the Beach Lodge.

Ralph C. Vonnegut Jr. Grants \_

**The Ralph C. Vonnegut Jr. Fund** was established to provide annual funding for environmental, educational, or recreational projects directly related to Lake Maxinkuckee. This grant cycle, \$2,000 was awarded to the **Lake Maxinkuckee Environmental Fund** to purchase water sampling equipment and supplies and \$4,619 was awarded to **Maxinkuckee Adventure Sailing** to purchase one Zest sailboat and accessories.



Fiscal Year 2020-2021

2019	- A generous \$500,000 Lilly Endowment GIFT VII Match Grant campaign launches to help build unrestricted endowments and increase
	the Foundation's capacity to respond to emerging and urgent community needs.

## MARSHALL COUNTY COMMUNITY FOUNDATION STAFF



of the heart and generosity of this community in supporting each other and a vision for the future. It is an honor to hear why people give and how that impacts our communities and the people who live, work, and play here."

#### Naomi Enamorado

Accounting and Finance Assistant nenamorado@marshallcountycf.org

"I have the pleasure of interacting with all aspects of the Foundation – the giving and the receiving. I see the generosity of our donors make a real-world impact for our scholarship and grant recipients and our Trusted Community Partners."

#### Jayne Roahrig Resource Development Specialist jayne@marshallcountycf.org

"I love to see and experience all the good the Foundation does for the community, and the impact it has on organizations and individuals to achieve their goals and education."

#### **Emily Maggart**

Development Director emaggart@marshallcountycf.org

"Marshall County is the epitome of neighbors helping neighbors. When the pandemic hit, community members from all backgrounds stepped in to help in any way they could. Everyone works to better the community they are proud to call home."









#### Tammy Houin Director of Accounting and Finance thouin@marshallcountycf.org

"We see firsthand the difference the Marshall County Community Foundation has made by being a supporter of visionary ideas with the power to improve the lives of all of our residents."



Cush Cuthbertson Systems and Communications Specialist ccuthbertson@marshallcountycf.org

> "In my role in systems and processes, I am rewarded everyday by being able to work on a strong and dynamic team to meet the needs of the community."



Angie Rupchock-Schafer Director of Community Impact and Communications arschafer@marshallcountycf.org

"For me, my job is a labor of love – sharing stories of the community impact made possible by our donors and their philanthropy in Marshall County."



2020 - The MCCF and United Way of Marshall County together activate the Marshall County COVID-19 Community Response and Recovery Fund. MCCF joins forces with Marshall County Crossroads Team, United Way, area businesses, nonprofits, and municipalities to raise \$524,389 to "Fund the Essentials" for COVID-19 response.

2021 - MCCF celebrates 30 years of community philanthropy!









# HELPING GREAT IDEAS TAKE FLIGHT





COMMUNITY-MINDED PARTNERS / TRUSTED INVESTORS VISIONARY THINKERS / OPPORTUNITY CONNECTORS

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