Building Community
Our Story

Wayne County Foundation
“It is very important to me that my grandsons know that anyone can make a difference in the community - both by giving what he or she can financially, and also by giving of their time and talents in service to others.”
- Susan Isaacs
Endowed funds create a lasting legacy for you, your family, or those you wish to remember. They also offer ongoing support for the charity of your choice and may provide you with valuable tax benefits. Endowments are permanent funds that can be created in support of one organization, in support of a field of interest (the arts, education, youth, or animals, for example), or can be unrestricted to be used where the community’s need is greatest.

These funds can be created to honor someone special or create a lasting legacy for a loved one. You can even build an endowment over time through our Acorn Funds!

**SHARING GIFTS of Philanthropy**

In 2015, Susan Isaacs was serving as a member of the Board of Directors of the Foundation. When Lilly Endowment Inc. challenged the community to raise money in order to claim a $1 million match from the Endowment, Susan stepped up and made a gift that established the Susan Isaacs Endowment Fund.

Over the years since its inception, Susan has added to the fund using money she has earned doing taxes. “My job as Township Trustee is very rewarding and I love it but I also love doing people’s taxes and that is the money I use to help grow my fund at the Foundation,” Susan said.

Susan, who is raising her two grandsons, also uses the fund to teach the boys about philanthropy and the need to give back to the community.

Though modest in its beginning, the fund has continued to grow and annually provides support to the Foundation’s grant-making activities.

In October, Lilly Endowment Inc. announced another round of the Giving Indiana Funds for Tomorrow (GIFT) program. This will enable the Wayne County Foundation to capture $1 million, based on our success in raising gifts into endowed funds. In particular, donors establishing or building unrestricted endowments at the Foundation are eligible for a 2:1 match on their gifts, while those adding to or establishing endowed funds for a particular purpose are eligible for a 1:2 match. This opportunity continues through December 2020 or until all the funds have been claimed.
A charitable gift annuity is a way you can make a gift to your favorite charity through the Foundation and receive fixed payments for life in return.

The payments can begin immediately or be deferred until a future date and will not vary. The payments received under a gift annuity agreement will vary by the age of the annuitant but generally speaking, the older the annuitant, the higher the rate. The terms of the annuity are spelled out in a simple agreement signed by you and the Foundation. Gift annuities have many other advantages! They:

- are not affected by interest rates or stock prices;
- will likely help you save on your taxes, especially if you use appreciated stock or mutual fund shares to fund your annuity; and
- can be set up to benefit someone else. Doing so assures continued payments to a loved one.

The annuity ends on the death of the annuitant(s), at which point the Foundation uses the remaining funds as you, the donors, have outlined in the agreement.

When Lilly Endowment Inc. offered matching dollars in 2015, Ed and Carolyn Lafever saw a way to help the community and create an additional stream of income for their retirement years. When they created their Charitable Gift Annuity, their generous gift garnered matching dollars from GIFT VI that created an unrestricted fund. This fund supports the Foundation’s community grant-making while their annuity supports the Lafevers in their golden years.
Janet Wortman comes from a family of educators. Her great-grandmother and her grandparents were teachers. Her mother and brother were teachers and Janet, herself, taught in Richmond. She led classes at Highland, Charles, and Westview Elementary Schools and spent 26 years at Garrison Elementary. When she talks about teaching her eyes light up and you see the passion she has for helping children learn. Yet she humbly says, “From the time I started teaching, I learned a lot!”

Now retired and living in her hometown of Morristown, Janet has not forgotten her adopted home of Richmond. Though no longer living here, she remembers Richmond fondly. “I want to support education, to help assure others have the opportunities I had. And I want to give back to the community that gave so much to me,” she said.

In 2018, she established the Janet Wortman Scholarship Fund to provide scholarships to Richmond High School seniors who graduated in the upper third of their class and who plan to attend Ivy Tech Community College in Richmond or IU East.

Janet has made plans to add to the fund during her lifetime and in her estate plans, assuring her passion for teaching will be remembered as her legacy for generations to come.
A bequest is one of the most touching and enduring statements a person can make. Because bequests are gifts made on a donor’s passing, they represent a final declaration of what was important to them during life and serve to create a lasting legacy for future generations.

A bequest – a gift made as part of your estate – can be made through the Foundation to benefit the community. Bequests can be a specific dollar amount, a percentage of one’s estate, or the amount that remains after all other obligations have been fulfilled.

Bequests to the Wayne County Foundation often create permanent funds designed to ensure the donor’s intent is fulfilled for years to come. These funds might be in the form of:

- scholarships which will be awarded based on the donor’s selected criteria;
- organization-designated funds, benefitting the work of one or more specific agencies;
- field of interest funds that can support a range of programs or initiatives relating to certain charitable themes; or
- unrestricted funds to be used to address the most pressing needs over time or in support of opportunities as they become apparent.

Regardless of the fund type that is established by the gift, a bequest serves to identify and memorialize the charitable program or purpose that is most important to the donors. The generosity that is expressed by a bequest is very meaningful and creates a lasting difference in our community today, tomorrow, and forever.

**Modest Bequests Can Create Meaningful Endowments**

In 2003, a $1,267 bequest from Mary Hatfield Jenkins established the Mary Hatfield Jenkins Memorial Fund. Since then, a trust has added to the fund and the result is amazing! To date, the fund has awarded over $1,469,529 in scholarships to graduating seniors of Wayne County high schools who have been recognized for their academic excellence.
For forty-one years, the Foundation has helped generous individuals and families create lasting benefits for our community. These legacies are ones of “philanthropy in action” and thoughtful concern for others. The Legacy Society was created in 2007 to thank these forward-thinking donors and to recognize their generosity during their lifetimes.

The Society is comprised of the many caring individuals who have made formal plans to benefit the community through a gift to the Foundation. We thank the members of the Legacy Society and our Cornerstones who remembered the Foundation prior to the creation of the Legacy Society.

Anonymous Donors
*Frank and *Mary Alice Adney
Tom and Sheryl Alberts
Charles Ball
*Chris Benton
*Tom and Jo Bivens
Steve and Jill Borchers
*Julia Downs
Jim and Penny Duke
*Tom and *Annadell Ebbinghouse
Jon and Judy Ford
*Al and *Loraine Gentry
*Leroy and Barbara Gohn
Roger and Connie Green
Chris Hardie and Kelly Burk
Tom and Mary Heyob
*Mike and Carol Hinshaw
*Eileen Hunt
Ron and Rachel Hughes
Jon and Suzette Igelman
Pat James
Vikki Johnson

*Vic and *Faye Jose
Dick and Sherry Kirschner
*Marlowe and *Pat Kluter
Edward and Carolyn Lafever
Daryl and Terri Lane
Paul and Pat Lingle
Barry and Carolyn MacDowell
Joan Martin
*Charlie Matthews
*Maxine Matthews
*Marjorie Meredith
Steve and Andrea Mosey
Ernie and *Betty Mills
*Bill and *Becky Niersbach
David and Beverly Nixon
*Evelyn Petry
Sherry Petry
*Erma Rich
*Roy Ridge
*Marvin and Becky Railsback
Lowell and Kathleen Robinson
David Rodgers

*Hugh and *Sara Ronald
*Bob and Jane Rosa
Allan and Miriam Rosar
*Peter and Jean Rossi
George and Mary Schmid
*Karl and *Marjorie Sharp
*David Sherick
Siri Shinn
*Vera Reynolds
*Glen and Jewell Spears
*William Starr
David and Carla Stidham
*Laurence Strong
Don and Heidi Thurston
*Wayne and Jane Vincent
Colleen Walter
Patricia Wascomb
Darrell Watt
*Patricia Wedding
David and Tammy Williamson
Janet Wortman
Carl and Connie Wooldridge

*indicates those we remember

William F. Adler
Charles and Joan Bartel
Byron Bond
Willard G. and Jane Bowen
Clay and Opal Brooks
John and Mary Brubaker
Zelma Bozworth
Clarence Brown
Florence Bultman
Melba Dawn Chiarenza
Thomas Coffin
William J. Cramer
M. Glenn Cross
Fred and Alice Crye
Mary Louise Custer
Eunice E. Dare
Mildred Dreyer
Hub and Zella Etchison
Edward Fath
Kenneth Goodwell
Gilbert Gray
Francis and Earla Gregg
Roscoe and Rosa Haindel

J. Ross and Natalie Harrington
John and Pat Harlan
Frank and Madeline Hensley
Anna Belle Henthorne
Mary E. Hill
Martha L. Hoffman
John Charles and
Gertrude Hubbard
Marie Ingabrand
Elizabeth Jay
Mary Hatfield Jenkins
Charles Kienzle
Nora Lee Latture
Fern Lee
Henry and Ruth Macy
Ruby Fender Martin
Donald McKinney
Mary Helen Miller
Antonio Mitrione
Marian H. Niswander
Robert O’Maley
Alicebelle Parry
Henriette Pierson

Abram Phillips
Ruby Ellen Phillips
Mary Elizabeth Powers
William H. Reller
Daniel G. Reid
Roberts Rhoads
Moreta Ballinger Rinehart
Ruth Hamilton Robbins
Charles Rodefeld
Jeanette Rodefeld
Will and Emma Rodefeld
Elizabeth Smelser
Catherine Binkley Thomas
Glenn Veal
Joan Vigran
Stanley Vigran
Harry and Marilyn Voyles
Lura Carnes Wine
Anne Withers
Frederick Wood and
Mary Couch Wood
Doris Wyatt
J. Rollf and Miriam Wadman

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Advised Funds Provide Options

As the name implies, a donor advised fund allows a person to make gifts out of a fund that he or she creates for the benefit of various charitable organizations. Think of them as a “charitable checking account,” where money is set aside now for distribution in the future.

Donor advised funds can be created as non-permanent funds that can be depleted or as permanently endowed funds, where only a portion of the fund is made available for distribution each year.

For some, donor advised funds are simply a matter of convenience, but there are advantages, too. These funds can receive large gifts when a ‘life event’ happens. Perhaps the sale of your business or home has created capital gains. A gift into the fund might help with the tax consequences!

Donor advised funds are also taking on a new importance with tax reform. To reach the higher threshold for itemizing deductions, some donors are considering ‘bunching’ their gifts with a contribution into an advised fund once every two or three years. This strategy will help them achieve larger deductions while also supporting their favorite charities.

DAF’s can also be used for family philanthropy. Some donors use an advised fund as a substitute for a more complicated family foundation, while others use them to teach their children the value of helping others.

When Ahaus Tool was looking for a way to streamline their corporate giving, they turned to the Wayne County Foundation. After learning about their needs and charitable passions, the Foundation staff offered a solution: a corporate donor-advised fund. In 2012, the fund became a reality. This ‘non-permanent’ fund allows Ahaus Tool leaders to make gifts into the fund when it is advantageous to them, helps build their corporate charitable ‘nest egg’, and then allows them to make gifts to their favorite organizations at any time.

One company. Several charitable passions. Consistent results: charity toward others.
Many people have charitable passions, but they may not understand all of the options available to support them. We’re happy to help explore them with you and make suggestions to fit your budget and timelines, as well as your interests. We may even be able to help you lower the cost of making a gift - or show you how to make a much larger gift than you ever thought possible! Your Wayne County Foundation staff is experienced and the Foundation is uniquely positioned to help you achieve your charitable goals and make a lasting difference in our community.

**STEPHEN C. BORCHERS**

Nearly all of Steve’s career has related to the not-for-profit community.

He served 20 years with American City Bureau – a small, but nationally prominent consulting firm. There, he worked with more than 150 client organizations engaged in local, regional, national, and international capital campaigns. In 2002, he assumed the position of Chief Operating Officer for the Indiana Humanities Council.

Three years later, Borchers joined the Wayne County Foundation as its Executive Director. In that position, he guides the Foundation’s development, investment, and grantmaking functions, as well as a wide range of community leadership initiatives.

Borchers graduated from the Ohio State University with honors in the liberal arts. He and his wife, Jill, have two adult children and three grandchildren.

**RACHEL H. HUGHES**

Prior to beginning her work at the Foundation, Rachel enjoyed a long career with the United Way. While working for the Indiana Association of United Ways, she served as a liaison, consultant, and strategic planning partner for Indiana’s State Employees’ Campaign. After moving to Richmond in 1994, she brought those same skills to the United Way of Whitewater Valley where she helped them realize their largest campaign to date.

In 2006, she became the Foundation’s first Development Officer. In this role, she enjoys helping donors find their passion and create their legacy through philanthropy. She makes connections with community leaders, serves as a consultant for the area’s nonprofit organizations, and develops and implements the Foundation’s fundraising and marketing strategies.

Rachel holds a Masters Degree in Philanthropic Studies from Indiana University. She is married to Ron and has four grown children and six grandchildren.
Achieva Resources Corporation

Achieva Resources Corporation provides guardianships to challenged adults who have no family members or those who have been abused, neglected, or exploited by friends and family members. Their successful Challenge Match campaign resulted in over $14,000 being raised to support their guardianship program.

The Golay Community Center

The Golay Community Center is a hub of family activity for western Wayne county. Last year’s Challenge Match allowed the organization to raise money to paint the inside of their pool. The Center’s natatorium is open year-round and is an important part of the community where local citizens of all ages, social classes, and abilities learn water safety.

Challenge Match Partners

Doxpop Charitable Giving Fund
Mr. Richard E. Jeffers

Reinke Donor Advised Fund
Mr. and Mrs. Allan Rosar
Wayne Bank Community Fund
The Challenge Match presents a unique opportunity for local nonprofit organizations to raise money to cover their operating expenses or special projects. The campaign, which offers matching dollars to participating organizations, has helped raise over 1.5 million dollars in each of the past three years.

Last year, 54 organizations collectively raised over 1.39 million dollars. The Foundation and its Match Partners added an additional $240,000 to create an astounding result: over 1.63 million dollars raised to support the most basic functions of the organizations that are changing lives of those who live in the Whitewater Valley.*

In order to fulfill their mission of giving animals a second chance at finding their forever homes, 2nd Chance Animal Rescue needed to raise money to support their rescue efforts. Through the Challenge Match, they raised nearly $8,600 that will support their newly-formed pet food bank, Bone Appetit, and provide pet food, cat litter, and treats to pet owners who have fallen on hard times. The money will also help their team continue to fight animal cruelty and homelessness for the pet population in Wayne County.

*A full listing of Challenge Match participants is included in the Annual Report located in the back of this book.
PREVIOUS RECIPIENTS

1994 – Charles A. Rodefeld
1995 – Robert W. Rosa
1996 – J. Ross and Natalie Harrington
1997 – Kathleen Postle
1998 – Becky Rosa
1999 – John M. Harlan
2000 – Jim and Helen Cope
2001 – William R. Niersbach
2002 – Victor R. Jose
2003 – Donald C. McCullough
2004 – Tom and Claire Ann Milligan
2005 – Inezetta Stiver
2006 – Paul Lingle
2007 – Andy Cecere
2008 – Albert Gentry
2009 – Jon Ford
2010 – David and Carla Stidham
2011 – Richard ‘Jeff’ Jeffers
2012 – Cheri Jetmore
2013 – Father John Luerman
2014 – Frank and Mary Alice Adney
2015 – Jack and Debra Edelman
2016 – Ray Ontko
2017 – Ginger Gray

Charles A. Rodefeld Award
For Leadership in Philanthropy
and Community Service

George Schmid

For many years, George Schmid has served Richmond Civic Theatre. Sometimes he’s the star. Sometimes he plays a supporting role such as House Manager or usher. Other times he has served at the highest level of leadership, President of the Board of Directors. Regardless of the task, George is always willing to help and his insights and thoughtful guidance are invaluable to those who work with him.

Whether serving in a starring role or in a supporting part, George’s main goal is to see the theatre flourish. He works tirelessly to achieve a level of professionalism at every stage of the organization’s operation. Volunteers who have the good fortune to work with George always feel valued and welcome. Donors who are approached by him leave knowing they have invested in their community in a positive, meaningful way, because he leads by example.

He and his wife, Mary, have been season sponsors of the theatre for more years than there are records to track the gifts. Their financial support has been vital in making sure the theatre continues to provide quality entertainment to the community. George also served on the Centennial Capital Campaign committee and helped raise $450,000 for much-needed upgrades to the historic Murray Theatre.

This commitment of time and financial support led to his selection as the recipient of the 2018 Charles A. Rodefeld Award for Leadership in Philanthropy and the Community.
Sometimes leadership is found in unexpected places. Such is the case in Dublin, a small community of around seven hundred people. Ask nearly anyone in town to name a force for positive change and you’ll get the same answer - Margurite Clark.

In 1991, she founded the Dublin “Do Gooders Club”. Members of this group gather and pay dues monthly. The Club uses their funds to help families in need. Under her leadership, the Do Gooders organize events at the local nursing home including monthly bingo and birthday parties, a yearly “Senior Prom” and the annual Harvest Ham and Beans Dinner. At Christmas, they ensure that each resident has a gift. They also sponsor regular parties for the residents at the State Hospital. Additionally, they provide help with funeral dinners and assist families who are struggling to pay their bills or just need a little help to occasionally make ends meet.

Margurite’s leadership and compassion have strengthened the entire Dublin community and the Dublin Do Gooders Club, which was born out of her passion for helping others, has grown into a multi-faceted presence in the Dublin area. It is for these and other reasons that Margurite was chosen as the 2018 recipient of the Ruth J. Wickemeyer Award for Community Service.
An Update from Lilly Community Scholar
Kara Lambright Schroeder

When Kara Lambright Schroeder was in high school, she played soccer and was very involved in school and her community, but her real love was learning. “I just love learning,” she proclaimed. That love of learning paid off when, in 2011, Kara received a Lilly Endowment Community Scholarship.

“For me, the scholarship was validation that all the time I spent being involved and studying was worth it. Someone noticed that I gave back in a meaningful way. That meant a lot to me,” Kara said.

Kara used her scholarship at Ball State where she earned a Bachelor of Science degree in nursing. After graduating, she started working at Reid Health where she serves as a labor and delivery nurse.

Kara and her husband, Andrew, live in Cambridge City. They enjoy spending their free time hiking and supporting locally-owned businesses and attractions.

“We love where we live. There’s so much to do here and Andrew and I love being part of it. I can’t imagine living anywhere else and feel so blessed that I can give back to this community.”

The prestigious Lilly Endowment Community Scholarships are awarded annually to two graduating seniors from Wayne County high schools. The recipients are selected on the basis of their academic performance, their written essays, letters of recommendation provided by their teachers or counselors, and their extracurricular activities.

Lilly Endowment Community Scholars receive a four year full tuition scholarship and book stipend to the public or private Indiana college of their choice.

In 2018, Taylor Brown and Logan Harmeyer were chosen to receive the scholarships.

Community Scholarships

“Community Scholarships

“We love where we live. There’s so much to do here and Andrew and I love being part of it. I can’t imagine living anywhere else and feel so blessed that I can give back to this community.”
2018 Lilly Endowment Scholars

Taylor Brown
Taylor Brown is the daughter of David and Stacy Brown. During her four years at Richmond High School, she maintained a 4.30 GPA while participating in track and field and National Honor Society. She volunteered at Cope Environmental Center and tutored other students in honors chemistry. While in school, she served in several leadership positions, including Health Occupational Students of America (HOSA).

Taylor is attending Indiana University-Purdue University Indianapolis where she is majoring in neuroscience and biochemistry.

Logan Harmeyer
Logan Harmeyer is the son of Mark and Andrea Harmeyer. While attending Lincoln High School, Logan maintained a 4.12 GPA and participated in a variety of varsity sports including football, track and field, and basketball. He was involved in several clubs including Business Professionals of America, National Honor Society, student council, 4-H, Parliamentary Procedures, and Spanish Club. He volunteered at the Lord’s Table Soup Kitchen and several other community service projects and spent 10 years in 4-H.

Logan is attending Indiana University-Purdue University Indianapolis.

“My first year in college has been a great experience. Not only have I been working hard in the classroom in my first year, I have also started to network for my future career. As a Sports Management Major at IUPUI, I have used the city of Indianapolis to help me in the future. I have taken part in a few volunteer opportunities - helping with the annual Monumental Marathon and also the Indy Ultimate. To go along with my experiences, I have been working part-time as a Brand Ambassador in the marketing division for the Indiana Pacers since October. This has been an amazing opportunity in the workforce that I plan on building on for the next three years.”

[ An Update ]
Forward Wayne County began as a way to bring folks together around common key priorities that are needed to move the community forward in a changing economy. The long term goals associated with the project seek to address the area’s population decline, below average income levels, higher-than-average poverty rates, and low levels of educational attainment.

Achieving these goals means our community will be better able to attract, develop, and retain a highly competitive workforce. This will benefit local businesses and corporations and, in turn, create more opportunities for individuals and families – now and far into the future.

The initiative is focused on two main areas: people and community. One area that has already seen success is the early childhood initiatives. Under the leadership of Pat Heiny and Dr. Nancy Green, the Foundation has already received two grants to aid in this endeavor. A $25,000 grant from Early Learning Indiana and a $206,000 award from the Family and Social Services Administration will each help increase the availability and quality of preschool education throughout Wayne County.

The initiative is focused on four key areas of Human Capital Development:
1. Early Childhood Success
2. Educational Attainment
3. Employability
4. Health and Wellness

And four key areas of Quality of Place:
1. Neighborhood Development
2. Government and Policy
3. Environment
4. Arts and Culture
Our Staff

LISA BATES
Lisa joined the Foundation staff in November 2005 as the Administrative Assistant. In July 2014, she was promoted to Program Officer. In that capacity, she oversees all aspects of the Foundation’s annual grant cycles and administers over 125 scholarships.

Prior to joining the Foundation staff, Lisa worked for the Economic Development Corporation of Wayne County for eight years. Lisa holds an Associates of Applied Science degree in Accounting from Ivy Tech Community College. She lives in western Wayne county with her husband, Mark, and two sons Zach and Ben.

THERESA SCRUGGS
Theresa is the Foundation’s Administrative Assistant. In this capacity, she is an ambassador to those who visit the building. One of her primary responsibilities is managing the donor database which includes processing and acknowledging gifts made to the Foundation. Additionally, she serves as a resource person for supporting organizations and gives oversight to the Foundation’s physical property.

She holds a Bachelor’s degree in Business Education from Ball State University. She and her husband, Dave, live in rural Greens Fork and have two grown sons.

AMY WALTZ
Amy is a Certified Public Accountant who spent much of her career in public Accounting with her own business, and then with Ramsey, Rodefeld, Kassens and North. Amy is the Foundation’s Finance Officer, joining the staff part-time in 2007 and then full-time in 2013. In her position, Amy oversees all financial aspects of the organization.

Amy received her Bachelor of Business Administration degree in Accounting from Harding University and passed her CPA exam in 1991. She and her husband, Rod, live in Richmond. They have three grown children.
A Message FROM OUR BOARD CHAIR

I’m grateful for the people who have made 2018 a banner year for the work of the Wayne County Foundation. Through the generosity of many before us, Wayne County Foundation assets made possible the grants and scholarships of totaling over $2 million. With our local partners, we launched Forward Wayne County, by which we can use a collective impact model to address the most pressing projects that can increase our county’s economic prosperity. Finally, Lilly Endowment’s launch of Gift VII provided wonderful matching opportunities that we are using to increase the assets we can deploy to benefit Wayne County. What a year!"
Our Mission

The Wayne County, Indiana, Foundation, Inc. exists to foster and encourage private philanthropic giving, to enhance the spirit of community and to improve the quality of life in the Wayne County, Indiana, area now and for future generations.