

STEBEN COUNTY COMMUNITY FOUNDATION

ANNUAL REPORT 2018



Steuben County
Community
Foundation

Where Giving Has Impact

LETTER FROM THE CHAIR

A Letter from the Chair of the Board

SCCF experienced a year filled with growth and strategic thinking that will benefit the area for generations to come. Our board dedicated its time to examining the role SCCF fills in the community: meeting the needs of Steuben County, supporting local nonprofit organizations, and ensuring that the legacies of our donors live on into the future. With a new strategic plan to guide our next three years, I know we are in a stronger position to make an impact in each of those roles.

In 2018, we saw 12 new funds created by generous donors, each established uniquely to match their philanthropic passions. We gathered nonprofit organizations to share their needs for professional development and capacity building. We partnered with other agencies to organize networking meetings to encourage collaboration. In total, SCCF granted \$1.96 million to the community. I am grateful to the donors who have trusted SCCF to manage their charitable giving and allowed us to continue to serve the community year after year.

I look forward to my final year of board service, enjoying the growth I have seen in SCCF since I first joined in 2009.

James W. Burns
Chair of the Board
2017-2019



Volunteer Committees

Thank you to the many volunteers who serve on SCCF's various committees!

Steuben County Community Foundation Board of Directors
Finance & Investment Committee
Grants Committee
Scholarship Committee
Women's Fund Committee
Community Funds
Humanities Fund

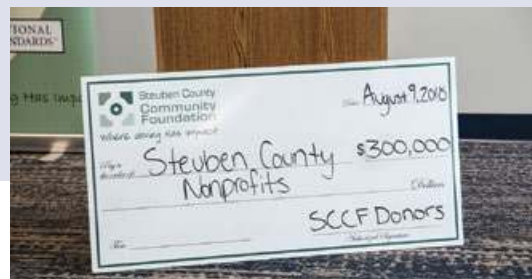


This year, we chose to focus our annual report on telling the stories of our donors, grantees, and other community efforts. To find a full listing of 2018 donors, grants, funds, and committee members, check out our website.

www.steubenfoundation.org/2018



Many checks were presented to nonprofit organizations at the SCCF annual meeting.



John McCoy, SCFN Board Chair, & Doug Bomba, SCCF Board Treasurer



Jennifer Danic, SCCF President & CEO, addressing the attendees



Steuben County Community Foundation
Nonprofit Capacity-Building Initiative

For Steuben County Community Foundation to do its best work, we need to understand what issues are most important to area residents. Based on feedback from surveys and focus groups, the board of directors formulated a three-year strategic plan to create a better version of SCCF, serving as a champion of philanthropy in Steuben County. Throughout our 2018 Annual Report, we highlight our work towards three ideal nonprofit qualities identified during this process: **Connected**, **Sustainable**, and **Collaborative**.

4 BASIC GOALS:

Asset Development

We know that people are excited to hear about the big opportunities for improving quality of life in Steuben County. By involving every generation of Steuben County, SCCF will be able to increase our impact in the community.

ASSET DEVELOPMENT

*Raise more community assets
to do more good*

Succession Planning

In order to continue being an effective organization, SCCF will develop written succession plans and work to recruit multi-generational volunteers—including the development of a volunteer base for all Steuben County nonprofits.

SUCCESSION PLANNING

*Recruit and develop community
leaders for the future*

Impact Based Grantmaking

Our volunteer committees are working to become more intentional about community grantmaking. SCCF is improving its process for evaluating applications, measuring results, and effectively sharing this with the community.

IMPACT BASED GRANTMAKING

*Make maximum impact in the
community through grantmaking*

Nonprofit Capacity Building

In the spring of 2018, SCCF worked with Dr. Kelly Trusty to learn from our nonprofit leaders about their greatest needs and identify opportunities for development. Our goal is to help nonprofits improve their work, creating a lasting benefit for all Steuben County residents.

NONPROFIT CAPACITY BUILDING

*Commitment to strong and
sustainable community nonprofits*



With guidance from Dr. Kelly Trusty, discussions were held over a two-day period to identify needs and opportunities.

Dave and Kathy Bruns Commit to Giving Back



Kathy & Dave Bruns

“We have known about SCCF since it was formed and have watched it grow into a very vital part of our community,” said the Brunses. When David and Kathy Bruns discussed their estate plan last year, they were already familiar with the work of the Steuben County Community Foundation, and they were committed donors to a variety of local and faith-based nonprofit organizations. They chose SCCF to continue their philanthropy as part of their estate, creating the David and Kathy Bruns Fund at SCCF. “We have been

blessed and want to make sure the faith-based and education-related organizations we support now will continue their excellent work long after we are gone. We are confident that SCCF’s investment policies are sound and will continue our philanthropic footprint into the future.” As a designated fund, the earnings from this endowment will be distributed each year among the nonprofit organizations they have selected.

Dave and Kathy Bruns are now part of the Baron von Steuben Society, along with 29 other donors who have made planned gifts to SCCF. Describing the process, they said, “It was very easy to set up our fund. The CEO did a good job explaining options and answering our questions. We were excited to learn that having this fund actually simplifies our estate planning! We know that every dollar received by a nonprofit is a vote of confidence in its mission, leadership, and legacy of accomplishments. By setting up this fund we are stating our confidence in SCCF, as well as the charities we have chosen. We hope others will do the same!”

Chamber After Hours

SCCF hosted the Angola Chamber Business After Hours event in December 2017, providing an opportunity for community members to check out the SCCF office and meet SCCF board and committee volunteers. As part of this event, SCCF’s board allocated \$500 for one lucky attendee to designate as a grant to the charities of his choice. Ian Garner, Public Relations Manager at JICI Construction, split the funds between the Community Humane Shelter and Project Help. By gathering community members for a fun evening of networking, SCCF hopes to build connections that encourage people to get involved in their community.



Mike Busche, Lori Votaw,
Mike Votaw, and Linda
Busche



Nila Mumby and Roy Meyer
sampling the appetizers



Ian Garner with check

Anonymous Giving



Some donors are so excited about their giving, they want to share it with everyone. Others prefer to remain anonymous supporters for a variety of reasons. In 2018, two of SCCF’s new funds were established by anonymous donors who enjoy supporting the community. By creating donor advised funds, these individuals are able to work with SCCF staff to find needs in the community that match their philanthropic goals.



Baron von Steuben Society Members to Date

The purpose of the Society is to identify and thank those who, as part of their estate planning, have made bequests naming the Steuben County Community Foundation. To honor this example, SCCF established the Baron von Steuben Society. Society members are those making a personal imprint and a lasting legacy in our community.

Lucille Whitman
Wava Aughenbaugh
John Crone
Eileen Fulton
Elizabeth Hanna
Gene E. Kalb
John Kelly
Dick and Peg King
Tom and Joy LaCour
Oswald and Joyce Marcher
Donald and Martha Rogers
Estel Sewell
Helen Stevens
Thomas and Susan Wenzel
Lauretta Abrahamer
C.J. “Hymie” and Bea Geiger
Mary Elizabeth Moody
H. Pauline Hand
Dr. David W. Goodwin
Mary Jane Kruse
Neal and Soni Patterson
Larry and Mercedes Clemens
Katherine McDermott Herrold
Mary Jane Hall
Steve and Tana Gibson
Lynn B. Wernet
Verna Curry Boyer
Ralph and Cheryl Taylor
Ramona Holsinger
David and Kathy Bruns

Board of Directors Legacy Fund

Jim Stock, a founding board member of SCCF, passed away on August 12, 2017. Jim served on the SCCF board from December 1991 through June 2001. One of Jim's last wishes was to have a permanent endowment fund set up at SCCF that would, in his own words, "provide the greatest benefit to the foundation." After his passing, SCCF received many memorial gifts from friends and family. After consulting with his family, the Board of Directors Legacy Fund was established. This fund is in memory of all former board members who have passed on, and its earnings will support the Steuben County Community Foundation's operating expenses into the future.

Jim's widow, Anita Stock, said, "Jim was very aware of his roots and deeply committed to the community. He thought it was very important to make a permanent investment into the community he loved so much." Jim's son, Kevin Stock, said, "SCCF was a part of his makeup and being. He was always wanting to help out. This fund is a perfect reflection of my father's wishes."

In addition to Jim Stock, the Board of Directors Legacy Fund will also honor those who passed before him, including SCCF's founding board president, David Ballinger. He once shared, "The whole community is more philanthropic today because of the Steuben County Community Foundation. It's really something to rally around." Today, the board room where various SCCF committees meet to make decisions about community impact is named in honor of David Ballinger and his lasting impact. The Board of Directors Legacy Fund is another opportunity to thank those individuals who were instrumental in establishing SCCF, while helping to make a difference today in the lives of Steuben County residents.



Jim and Anita Stock



SCCF founding board of director members, from left to right: Neal Patterson, F. Mayo Sanders, David Ballinger, Charles Sheets, Carl Akers, Jim Stock, and Mike Zdyb.

Annual Designated Grants

Community foundations are often referred to as one of the best kept secrets in their towns. This year we decided to spill the beans. At our 2018 annual meeting, we shared the community impact made through automatic grants to nonprofits from some of our funds every year. SCCF distributed grant checks in excess of \$300,000 to more than 50 nonprofit organizations serving Steuben County! Each year, nonprofit organizations use these grant funds for a variety of projects, including maintenance expenses, scholarships, program costs, and administrative expenses. Designated funds are established by donors who wish to support a charitable cause or organization every year with the earnings from permanently endowed funds.



Designated grant recipients were well represented at the SCCF annual meeting.

Ramona Holsinger Estate Gift

Ramona Holsinger made the world a little brighter every day of her 102 years. When she passed away on June 13, 2017, Ramona gifted her estate to the Steuben County Community Foundation for the creation of the Ramona Holsinger Physical Education Scholarship fund. Ramona's incredible gift of more than \$212,000 established a permanently endowed fund at SCCF to support students pursuing a career in the field of physical education.

Ramona's passion in life was teaching, and she dedicated more than 35 years of her life to educating students in South Bend. Ramona loved to celebrate life, and she invited many friends and community members for a birthday party each year. Ramona had a wall full of awards and accolades, culminating in the surprise gift of a key to the city presented by her friend, Angola Mayor Richard Hickman. "She always wanted to have a dance with the mayor. Anytime there was something at Terrace Ridge she invited me, and we became friends," said Mayor Hickman. When he learned that Ramona had left her estate to the community, he was not surprised by the generous gift and remarked, "She's going to be educating



Ramona Holsinger

and described her as a "great gal, but there was no nonsense for Miss Holsinger!"

With her vibrant personality, Ramona is remembered fondly by many in the community. She decided to leave her legacy in Steuben County, which had truly become her home in retirement. "Ramona had the unique ability to create family out of friends," said Danette Kammeyer. "Ramona was teaching and loved teaching until the day she died. She loved kids, and being able to pass things onto them was special to her," shared Mayor Hickman. Ramona would want the students who receive her scholarship in the future to fall in love with teaching and to embrace every individual student.

even after she's gone." In a testament to her passion for teaching and connecting with youth, Ramona's estate gift was advised through a former student who she knew for more than 50 years. Retired Angola attorney and longtime friend Tom Wilson said, "People who knew Ramona all had a good story about her." Tom met Ramona as a fifth grade student

Crimmins Scholarship



Rita and John Crimmins

To honor the legacy of their parents, a new scholarship was established at the Steuben County Community Foundation by the family of John and Rita Crimmins. The scholarship will support Angola High School graduates who are involved in Health Occupation Education courses and choose to pursue training for important health-related careers in nursing, nursing assistant, or nursing aid fields. John and Rita were active community members

for many years, and Rita—a former nurse herself—created Angola's vocational education program for health occupations, known as HOE. The John and Rita Crimmins Health Occupations Scholarship will be offered each year starting in Spring 2019. This scholarship will honor the legacy of two committed Angola residents and allow many students to gain valuable training for a fulfilling career of service in healthcare.

Tilbury Family Fund

In March of 2018, Randy and Phyllis Tilbury established the Tilbury Family Fund at the Steuben County Community Foundation. The Tilburys are life-long residents of Steuben County and raised their two children here. They have made a commitment to giving back through an endowed scholarship fund. The Tilbury Family Fund will provide annual scholarships to Steuben County students choosing to attend either Bethel College or Butler University. Their son, Chris Tilbury, graduated from Bethel College in 2007 with a business degree. Today he is the golf professional at Pretty Lake Golf Club in Plymouth, Ind., where he also manages the golf course restaurant and facility. Their daughter, Sarah Mills, graduated from Butler University in 2010 with a pharmacy degree. Today she is the head pharmacist at Meijer's northeast store in Fort Wayne, Ind.



Randy and Phyllis Tilbury family

"We were very pleased with the education and the guidance that these universities provided for our children as they grew into adulthood," said the Tilburys.

A Natural Grant Connection

On a sunny day in July of 2018, crews from Gene Stratton-Porter (GSP) and Blue Heron Ministries trekked out to the Hemingway Wetlands in Rome City, IN, where GSP is in the process of returning reclaimed farmlands to their natural grasses. Steuben County Community Foundation (SCCF) was able to gather these groups together thanks to a generous gift from Cheryl Taylor and through the fund she established at SCCF in honor of her late husband's 30 years of service to the DNR and his passion for conservation. The Ralph E. Taylor Conservation Fund was established as a surprise



Cheryl Taylor

for him in 2003. After his passing in 2009, Cheryl has ensured that his legacy lives on through projects like this one.

With this grant funding, Blue Heron Ministries planted two grass-like plants around the islands in the wetland area to create a fence that deters geese from climbing onto the land, reducing the likelihood they will nest there and spread



Cheryl Taylor and Sarah Wilson

disease. Cheryl's gift to SCCF was at the center of this collaborative effort, with the Nature Conservancy donating the plants, Blue Heron Ministries installing the plants, and the community around Gene Stratton-Porter benefitting from the conservation of their wetlands.

As the crew planted the grasses, Cheryl shared stories of her husband and their time together. "I have a thousand bits of trivia from my husband. He was the most interesting man I ever met in my life," she said. Ralph was passionate about conservation in his career, and it carried through his entire life. Cheryl spoke excitedly about how she would love to encourage more people, especially children, to go outside, plant flowers and enjoy nature.

In addition to connecting a key donor to SCCF with a grantee who benefits from many funds held at SCCF—Blue Heron Ministries—a third connection was made when Cheryl was introduced to Steuben County's 2016 Lilly Endowment Community Scholar, Sarah Wilson. Wilson spent the summer as an intern for Blue Heron Ministries and was involved in the planting that day. She thanked Cheryl for providing the grant funds and shared that her



Pictured Left to Right: Angela Mapes Turner, Nate Simons, Tedra Hemingway, Jennifer Danic, Cheryl Taylor, and Tiffany Parker

grandmother always spoke about how much she loved the area they were planting.



Reintroduced orchid species

Cheryl was an active participant and planted many of the grasses around the gazebo. She said her husband would have wanted everyone to get involved. "He always said the only way to experience nature is to really join in and get your hands dirty!"

This is the third project in three years and in three counties that Cheryl Taylor and Blue Heron Ministries have been involved in to promote the conservation goals of Cheryl's late husband, Ralph. Last year, Cheryl's gift and funding from the Ralph E. Taylor Conservation Fund at SCCF gathered Blue Heron Ministries and the Friends of LaGrange County Parks for the conservation of the wetlands and prairie land known as Duff Lake Fen. The funding was used for the purchase of two orchid species that are native to northeast Indiana. This project was part of a larger effort to diversify the plants in areas of northeast Indiana. The goal is for county residents to enjoy the beauty of their community while rare or endangered plants and animals, such as the federally endangered Michells Satyr butterfly, are given the opportunity to thrive.



Cheryl Taylor, Michael Metz, Nate Simons, Gary Chapman, Gloria Sherwood, Elma Chapman

COLLABORATIVE

Collaborating to Address Early Childcare Concerns

SCCF awarded a one-year grant of \$36,080 to the Early Childhood Alliance (ECA), though it might be better described as a careful investment addressing a need for more quality childcare options across the county. The goal of this grant is to build capacity and increase program quality for childcare in Steuben County. Miranda Curey of Little Munchkins ChildCare was one of the childcare providers attending the Steuben County provider events designed to support early childhood education professionals. These events, which give providers across the county opportunities to learn, network, and share best practices, are hosted by ECA. Curey shared, "I am always trying to be better at what I do and provide the best care for our community, and by having these events and being able to ask the questions I had, ECA will help me do this."

These ongoing learning opportunities for providers are just one component of the grant. The grant also provides funding to help both new and existing childcare programs meet requirements to enroll or advance in Paths to QUALITY™ (Indiana's quality rating and improvement system for

childcare providers). So far, six early education programs in Steuben County have received quality improvement grants, including Heaven Sent Preschool and Daycare, Miss Roxy's Daycare, Little Lambs Daycare Inc., Little Farmers Child Care and Preschool, Agape Child Care Ministry, and Kingdom Kids.



Quality Child Care gathering

Another key component of the initiative is offering support for providers working to achieve a Child Development Associate credential. Tori Cline, director of Kingdom Kids, shared, "When a program embarks on their journey with the Early Childhood Alliance, it helps the whole dynamic of a child's care. We are able to educate our staff and our families on the importance of early childhood and really set the stage for children to be excited about learning. When you can change the first five years, you can change everything."

Fremont Fund Provides 3D Printer to Middle School



Fremont 7th grade class

Last year the Fremont Middle School Project Based Learning (PBL) class received a grant for a Dremel 3D40 3D printer through the Fremont Fund at SCCF and the Fremont Chamber of Commerce. This grant was a natural partnership for SCCF

and the Fremont Chamber of Commerce, which is interested in developing a community of thinkers and potential employees who can solve problems. The printer has been in the middle school PBL classroom since January 2018, and Fremont has been able to share the printer between schools. Since then, 7th grade students learned about using design software like

Tinkercad and the challenges of printing plastic keychains. Their next step is to identify a problem in the schools and use engineering to design a solution. One team is considering making 3D maps of the schools for substitute teachers, new students, and students with sight impairments.

In order to engage more local voices in grantmaking, SCCF holds community funds for Angola, Ashley-Hudson, Clear Lake, Fremont, Hamilton, Helmer, Metz, Orland, Pleasant Lake, and Salem Center. Every fund has a committee of local residents who evaluate grant applications that directly affect the people in their area. Each year, these community funds also receive a portion of the profits of the Steuben County Fiber Network, SCCF's supporting organization, to use for funding local projects.

Forever Improving Steuben County Together

Steuben County's youth pod—FIST—celebrated another successful year of philanthropy, grantmaking, and community service. The 19 youth pod members are students at Fremont Community Schools, Hamilton Community Schools, and MSD of Steuben County, and they range in age from 13 to 18. In 2017-2018, they organized a number of community service events, including a canned food drive that generated four truckloads of canned goods, a county-wide bone marrow drive, a day of connecting with seniors at Cameron Woods



**FOREVER
IMPROVING
STEBEN COUNTY
TOGETHER**

while making Christmas cards, and presentations to middle school students to discuss the meaning of philanthropy. FIST also awarded 11 grants for a total of \$7,485, which supported arts projects in Steuben County schools and other community needs. Over the course of the school year, FIST was able to engage 175 other youth in philanthropic activities.



FIST members welcomed its newest members by making blankets for the Community Humane Shelter this spring.



Steuben County Fiber Network

The Steuben County Fiber Network (SCFN) is a 160-mile broadband fiber network, with 160 connections in Steuben County. As a nonprofit supporting organization of the Steuben County Community Foundation, SCFN creates a high-speed, large bandwidth data infrastructure with profits returning to the community through endowment funds at SCCF. Since 2001, \$4.5 million in grants and local government funds were raised to put the fiber network in place, and its users have saved in service fees compared to the prices that would have been charged by private fiber service providers. In return for its investment, SCCF enjoys a reliable source of funding for its annual operations as well as community grantmaking. In 2018, SCFN donated \$34,400 to SCCF for grantmaking.

SCFN Mission: "To develop and implement a premier, locally-owned fiber optic network in Northeast Indiana that will provide secure, affordable, maximum speed broadband services while returning financial resources for community grantmaking."

2018 SCFN Board of Directors

John McCoy, Chair

Chris Snyder, Vice Chair

Kathy Armstrong, Secretary/Treasurer

Ellen Bisson

Kris Keen

Isaac Lee

Gary LeTourneau

Jennifer Danic, Ex Officio

Steuben County Community Foundation President/CEO

Bill Geiger

Network Manager / Technical Assistance

Professional Advisor Recognition

Thank you to the financial advisors, attorneys, accountants, and other professional advisors who supported SCCF's donors in their philanthropic goals during 2018. The following professional advisors attended a seminar hosted by SCCF, volunteered on a committee, or provided advice to SCCF donors in 2018.

Luke Andrews
Jacob Benedict
Eugene Bosworth
James W. Burns
Rhonda Hanson
Jim McEntarfer
Adam Miller
Lori Olson

Susan Ralston
Brenda Shipe
Melissa Stout
Randy Tilbury
Lynn Wernet
Latrielle Wheat
Tom Wilson



James Burns, SCCF Board Chair, and longtime volunteer Steve Mumby.

A "Kasota Island Adventure" was held in June at Clear Lake in appreciation of the service of SCCF board and committee volunteers.



The event was held at the Clear Lake Yacht Club.



Here we go!

2018 Board of Directors



James W. Burns
Chair



Randy White
Vice Chair



Doug Bomba
Treasurer



Julie Troyer
Secretary



Kathy Armstrong



Dave Goodwin



Sherry Holiday



Jim Ingledue



Phil Meyer



Adam Miller

Welcome to our new 2019 Board Members



Chris Snyder



Kevin Stoy



Jaime Walker



Jan Williams



Pam Harger



Brenda Shipe

Staff



Jennifer Danic
President & CEO



Sandy Ferrell
Office Manager



Jacqui Gentile
Program Officer



Susie Nafziger
Youth Philanthropy
Coordinator



JoAnna Ness
Communications
Director



Randy Tilbury
CPA



Megan Boston
Intern

SCCF is fortunate to participate in the Community Foundation Internships program funded by Lilly Endowment. We offer paid internships to graduate and undergraduate students year-round and benefit from a variety of skills and projects they produce. In the 2017-2018 school year we enjoyed the company of Megan Boston from Trine University.

Steuben County Community Foundation, Inc. and Affiliate
Consolidated Statements of Financial Position
July 1, 2017-June 30, 2018

	<u>2018</u>	<u>2017</u>
Assets		
Current assets:		
Cash and cash equivalents	\$ 368,242	\$ 236,731
Accounts receivable	50,035	62,302
Prepaid expenses and other	35,042	26,931
Total current assets	<u>453,319</u>	<u>325,964</u>
Investments	22,849,039	21,346,385
Land, building and equipment:		
Land	382,781	382,781
Building and improvements	466,990	466,990
Office furniture and equipment	276,422	276,422
Fiber optic network	4,580,963	4,529,819
	<u>5,707,156</u>	<u>5,656,012</u>
Less accumulated depreciation	1,646,747	1,406,988
	<u>4,060,409</u>	<u>4,249,024</u>
Other assets:		
Cash value of life insurance policy	422,186	402,850
Beneficial interest in trusts	678,165	591,668
Total assets	<u>\$ 28,463,118</u>	<u>\$ 26,915,891</u>
Liabilities		
Current liabilities:		
Accounts payable and other current liabilities	\$ 70,359	\$ 33,265
Current portion of grants and scholarships payable	130,550	142,850
Current portion of long-term debt	174,396	170,095
Current portion of deferred revenue	113,511	111,631
Total current liabilities	<u>488,816</u>	<u>457,841</u>
Grants and scholarships payable, less current portion	88,999	52,500
Long-term debt, less current portion	139,955	314,351
Deferred revenue, less current portion	72,277	82,492
Total liabilities	<u>790,047</u>	<u>907,184</u>
Net assets:		
Unrestricted	\$ 3,408,452	\$ 3,333,812
Temporarily restricted	5,595,038	4,684,608
Permanently restricted	18,669,581	17,990,287
Total net assets	<u>27,673,071</u>	<u>26,008,707</u>
Total liabilities and net assets	<u>\$ 28,463,118</u>	<u>\$ 26,915,891</u>

The Steuben County Community Foundation is a tax-exempt, 501(c)(3), independent, charitable organization. It is supported by many individual and corporate donors and receives no tax support. The financial information reported here has been extracted from the audit report of Haines, Isenbarger & Skiba, LLC dated September 20, 2018. The complete financial statements and accompanying notes are available by contacting the SCCF office. SCCF also files an IRS Form 990 each year. A copy of our Form 990 is available by contacting the SCCF office or searching online at www.GuideStar.org.

See a full list of SCCF's donors, grants, funds,
and committee members for 2018 on our website.

www.steubenfoundation.org/2018



1701 North Wayne Street
Angola, IN 46703
(260)665-6656
www.steubenfoundation.org

Our Mission:

“Connecting people who care with needs
that matter to our community.”

Our Vision:

“Serving as a community leader and
improving the quality of life by assessing,
supporting, and coordinating philanthropic
giving and endowment building.”



Steuben County
**Community
Foundation**

Where Giving Has Impact



The Steuben County Community
Foundation is confirmed in
compliance with the National
Standards for US Community
Foundations.