



Community
Foundation
of Boone County

ANNUAL REPORT 2013

The Community Foundation of Boone County unites people, organizations and philanthropy to create a thriving community for all.



“To effectively impact a life, a relationship must be forged, trust built, accountability established. And this does not happen in long, impersonal lines of strangers.”

— *Robert D. Lupton, Author of Toxic Charity*



Marc Applegate
Chairman of the Board



Jennifer Pendleton
President

Dear Boone County Friends,

2013 was a year of growth and change in many exciting ways for the Community Foundation of Boone County. Hopefully you were a part of some of the major initiatives that began last year. When Jennifer Pendleton became President, she traveled across the county in an A-Z (Advance to Zionsville) Listening Tour with staff and board members to learn more about our county’s communities, needs, people and organizations. This was a highlight of our year as we enjoyed visiting with old friends and meeting new people that are making a difference in Boone County. We have used this feedback and input in almost every facet of our work as we plan for the future.

The result from this experience is that the Community Foundation of Boone County will be shifting its vision to focus on greater impact and fostering collaboration to solve some of the county’s biggest issues, and develop a vibrant, connected and active community.

Our Board of Directors had their work cut out for them in how to best respond to what we learned. The first step was revising the community grantmaking criteria to better align with the needs and objectives of the county. You’ll now see in our Grant Guidelines that we have highlighted our funding priorities. We have also been strengthening our relationships with county nonprofits and decided to convene as many nonprofits as possible in the spring of 2014 for a Boone County Nonprofit Summit. With over 60 attendees representing 40 nonprofits, we began a dialogue with the leaders of the organizations that serve our county about how we can work together and build a vision for positive solutions – together.

While we’ve always known this, our most exciting affirmation in all of our work in 2013 is that Boone County is an incredible place to live with even more incredible people. We are thankful to our donors and fundholders that make our work possible.

If we haven’t already talked with you, either personally or at an event, we would love to meet with you and get your thoughts. As your community foundation, we look forward to continuing our work of uniting people, organizations and philanthropy to create a thriving community for all. We are pleased to share this annual report of 2013 and hope to connect personally with you as we build on both your philanthropic dreams and our county’s needs for 2014 and beyond.

We hope you’ll join us in continuing to make a difference...here.

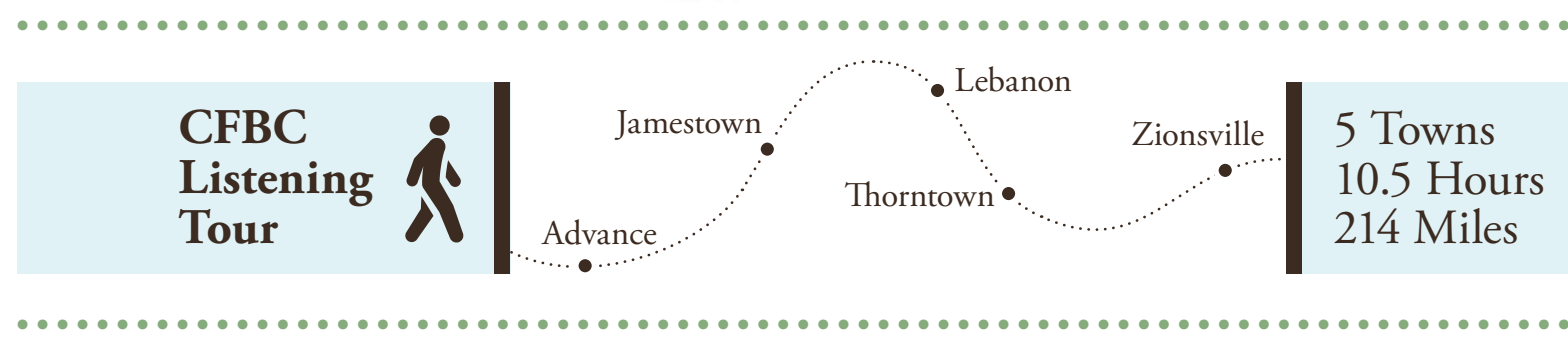
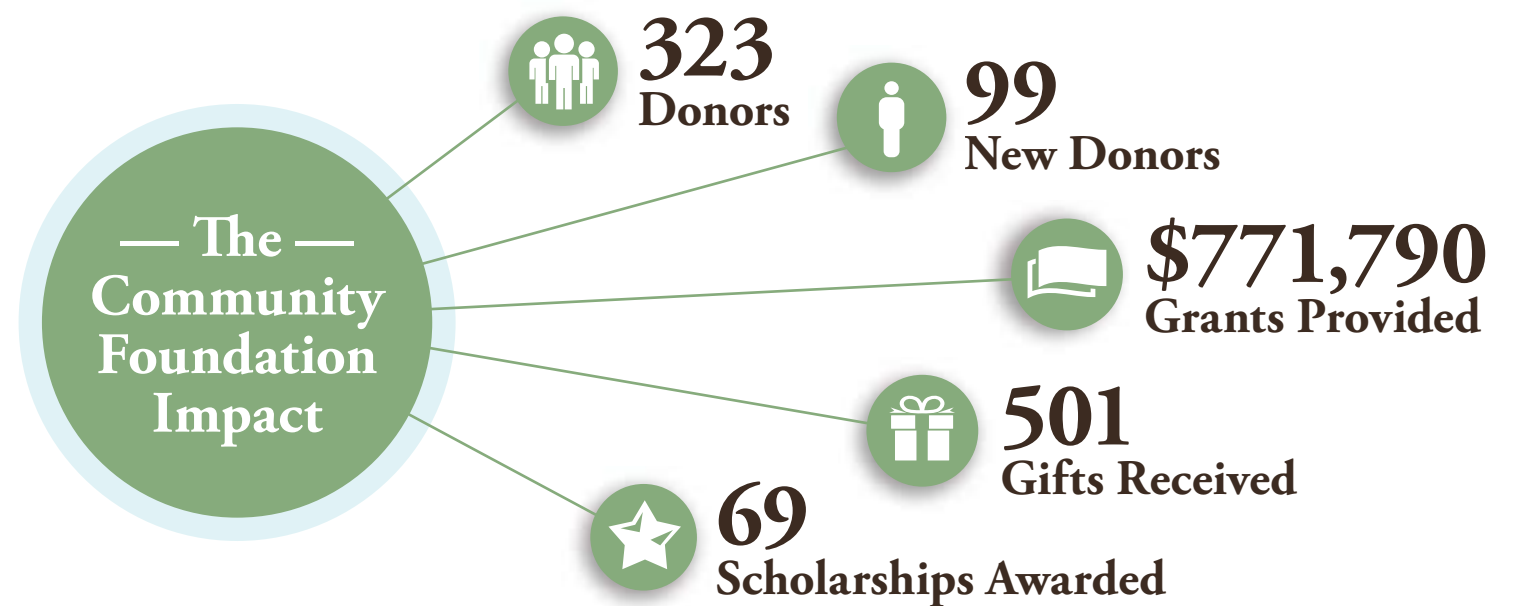
Most sincerely,

Marc Applegate
Chairman of the Board

Jennifer Pendleton
President

Cover photo: Community Foundation board members, past and present, gathered in September to connect with old friends, learn about our community’s current needs and share their ideas for addressing them. Guests voted for their favorite 2012 Annual Report story, selecting the Lebanon High School Graduation Coach program to receive a surprise \$2,500 grant.

We are grateful to Tiffany Perdue for her 6 years of service on staff at the Community Foundation.



New Endowment Funds in 2013

Dean Ryan Barrett Memorial Missions Endowment

In celebration of his life, Dean’s family established a donor-advised fund to support Zionsville area churches in funding their youth members to take part in mission trips across the country and the world.

Glen L. Harlos and Mildred M. Harlos Fund

Mr. and Mrs. Harlos were longtime farmers with a passion for agriculture and youth. Through a generous bequest gift set up prior to their deaths, a designated fund was established to support the Boone County 4-H program in their work aiding youth development.

Gerald L. Limp Educational Endowment

As a designated fund, the Gerald L. Limp Educational Endowment supports the Lebanon Educational Foundation for the purpose of awarding the James Rosenstihl Memorial Basketball Scholarship.

Gerald L. Limp Leadership Endowment

The Phi Sigma Kappa Foundation is the beneficiary of this designated fund, which supports a scholarship for deserving individuals to attend the Robert M. Zillgitt Leadership Institute.

Sease Family Fund

Beth and Dan Sease established a donor-advised fund to support the spirit of philanthropy by funding causes within the Boone County community.

For a complete list of our funds and their purpose, visit communityfoundationbc.org

What we learned from our community assessment and listening tour helped us shape our community grantmaking criteria to better align with needs of the county.

The Community Foundation is proud to support programs like Indy Reads, which provides literacy tutoring for adults.



Alejandra (L) and Ingrid (R)
Indy Reads



Special Olympics



Jamestown Listening Tour



4-H Dog Training

Alejandra relocated to the U.S. from Mexico two decades ago, but she can still recall the difficult time she had learning a new language and adapting to life in a new country. Not being able to speak English, Alejandra found it difficult to do basic things like talk to her children's teachers and go to the doctor by herself. She wanted a better life for herself and her family and she knew that learning a new language would benefit her own independence, along with her family and friends. The Community Foundation of Boone County supports Indy Reads through the Pete and Henrietta Hudson Charitable Fund to provide Alejandra a tutor, Ingrid. During their time together, Alejandra finally gained confidence about the meaning and pronunciation of English words and began using them every day. That skill improved her life for the better. Now this local business leader and Boone County resident gives back, tutoring others in ESL and translating for other Spanish-speaking residents in the surrounding community.

“Without programs like this, I couldn't have started my own business. People like Ingrid, and those who support literacy programs, make it possible for me to have the position I have now.”



Maplelawn Listening Tour

In 2013, Community Foundation staff and board traveled across the county on an A-Z (Advance to Zionsville) Listening Tour to learn more about our communities, needs, people and organizations. What we learned has helped shape our new grantmaking guidelines, as we work to more effectively support Boone County organizations such as Special Olympics and 4-H.

Statements of Financial Position

Assets

Investments	\$19,616,587	94%
Cash & Cash Equivalents	\$924,670	5%
Mortgage Receivable	\$127,239	1%
Office & Furniture	\$39,976	<1%
– Less Accumulated Depreciation	– \$37,249	<1%
Prepaid Expenses	\$2,115	<1%
Accrued Interest & Dividends	\$1,537	<1%

Total: **\$20,674,875**

Liabilities

Agency Funds	\$457,950	49%
Grants Payable	\$366,005	39%
Gift Annuity Reserves	\$101,673	11%
Accounts Payable	\$5,641	<1%
Accrued Liabilities	\$4,966	<1%

Total: **\$936,235**

Net Assets

Permanently Restricted	\$15,862,662	80%
Unrestricted	\$3,862,988	20%
Temporarily Restricted	\$12,990	<1%

Total: **\$19,738,640**

“The Community Foundation of Boone County is an asset to the community because of its ability to provide a legacy that will keep giving.”

— Marc Applegate, Chairman of the Board

The Community Foundation helps fund 4-H, which provides classes for youth, such as dog training.

4-H Dog Training

Nick, a 2014 Lebanon High School graduate, has been actively involved with 4-H since he was young. His participation in 4-H not only piqued his interest in the agriculture industry, but also instilled in him leadership skills, speaking abilities and determination to accomplish his goals. The relationships he fostered and the management and presentation opportunities he received while serving as 4-H club president have helped shape Nick’s future goals. He plans to attend Purdue University in the fall and study for a career in agriculture, in large part due to his time in Boone County 4-H. In 2013, a bequest gift from Glen and Mildred Harlos established a fund that will benefit Boone County 4-H forever, ensuring that our community’s youth will continue to thrive under this exceptional program.

*“I’m beyond grateful for the opportunities I received through my time with 4-H. My advice for current and future students: **If you like what you’re doing, you will have fun, but don’t be afraid to try something new.**”*

Scholarships Awarded in 2013

Lilly Endowment Community

Scholarship Recipients:

Kate Emmert
 Kate O'Rourke
 —
 Syed Ather
 Doyle M. Baxter
 Rachael Bazzell
 Marisa Beaty
 Britta Beyer
 Hannah L. Biggs
 Margaret M. Boldebuck
 Avery Boxell
 Megan A. Broecker
 Gabrielle M. Caldwell
 Davis Clutter
 Paige Conrad
 Julie E. Coval
 Parker E. Dunshee
 Luke Everett
 Jenna N. Fritsch
 Thomas Garrity
 Cameron Guernsey
 Emily F. Higgs
 Alexandra Hocutt
 Carolyne Holcomb
 Okara Imani
 Wilda Knecht
 Taylor Knox
 Moriah L. Landon
 Kyle T. Langford
 Nathan Lowe
 Grace Lyons
 Quintin Martin
 Christopher L. Mason

Catherine Mazanek
 Presley T. Moreland
 Carrie Perras
 Srisha Pillay
 Kyle Plummer
 Joseph Plunkett
 Andrew Powell
 Devon A. Price
 Amy Sallee
 Courtney Sampson
 Zade Shaw
 Alyssa Slater
 Brittany Smith
 Ayanna Sykes
 Connor Thimjon
 Sarah Thompson
 Chelsea Thompson
 Bri R. Wagner
 Lauren Wilson
 Trevor Wright
 Graham T. Youngs

Grants Awarded in 2013

\$771,790 total funding

Alexander Christian Foundation, Inc.
 American Legion Post #395
 Book Readers and Horn Blowers, Inc.
 Boone County 4-H Club, Inc.
 Boone County Cancer Society
 Boone County Community Health Clinic
 Boone County Extension
 Homemakers Assn.
 Boone County Guardian Ad Litem/CASA
 Boone County Historical Society

Boone County Senior Services, Inc.
 Boone Meadow Elementary School
 Boy Scout Troop 350
 Boys & Girls Club of Zionsville
 Boys & Girls Club of Zionsville-West
 Brownwood High School
 Centenary United Methodist Church
 Central Elementary PTO
 Central Elementary School
 Christ Church —
 The Lutheran Church of Zionsville
 Delta Gamma Foundation
 Families First Indiana, Inc.
 Fellowship of Christian Athletes
 First Baptist Church of Lebanon
 Friends of Boone County Trails
 Gleaners Food Bank of Indiana, Inc.
 Goshen High School
 Habitat for Humanity of Boone County
 Harney Elementary School
 Hill School
 Hoosier Chapter Soil & Water Conser. Soc.
 Hoosier State Press Association
 I.W.I.N. Foundation
 Indiana Repertory Theatre, Inc.
 Indiana University Varsity
 Club-Annual Giving
 Indiana Youth Institute
 Indy Reads
 Information and Referral Network, Inc.
 (dba Connect 2Help)
 Jamestown Christian Church
 Jamestown Community Lions Club
 Jamestown I.O.O.F. Cemetery
 Jamestown United Methodist Church
 Jamestown Volunteer |
 Fire Department Auxiliary

Lebanon Area Boys & Girls Club
 Lebanon Community Arts Council of
 Indiana, LLC
 Lebanon Community of Shalom
 Lebanon Educational Foundation
 Lebanon Kiwanis Club
 Lebanon Public Library
 Lebanon Rotary Club
 Life Centers
 Little Red Door Cancer Agency
 Love INC
 Maplelawn Farmstead Inc.
 Mental Health America in Boone County
 Milledgeville Methodist Church
 National Marfan Foundation-Research Fund
 Northwestern University Feinberg
 School of Medicine
 Perry-Worth Elementary
 Phi Sigma Kappa Foundation
 Pittsboro Christian Church
 Disciples of Christ
 Pleasant View Elementary School
 Psi Iota Xi, Omega Chapter
 Sagamore Student Leadership Initiative, Inc.
 Special Olympics Indiana
 St. Mark's Lutheran Church
 St. Vincent Foundation
 Stonegate Elementary School
 Sugar Creek Art Center
 Symphony At Sunset Group, Inc.
 Tabitha USA, Inc.
 Teach for America, Inc.
 The Arc of Greater Boone County
 The Cabin Counseling and Resource Center
 The Salvation Army, Boone County
 Service Extension
 TheraPets of Indiana, Inc.
 Traders Point Christian Academy
 Traders Point Christian Church
 Tri Kappa/Alpha Beta Chapter
 Tri-Area Library
 United Way of Central Indiana
 Valparaiso University School of Law
 Western Boone Community School Corp.
 Western Boone Education Foundation
 Whitestown Lions Club
 Witham Family YMCA Branch
 Zionsville Booster Club
 Zionsville Center for Art, History
 and Genealogy, Inc.
 Zionsville Christian Church
 (Disciples of Christ)
 Zionsville Community Schools
 Zionsville Cultural District
 Zionsville Education Foundation
 Zionsville Lions Club
 Zionsville Lions Park, Inc.
 Zionsville Little League
 Zionsville Presbyterian Church

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 Gary Heck

Gifts Made in Memory of:

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We gratefully recognize the following donors to component funds of the Community Foundation:

ABC U and ME, LLC
 Mr. and Mrs. Brian Acton
 Mr. James Paul Acton
 Mr. Jason Acton
 Mrs. Jean Acton
 Mr. Norris Acton
 Mr. Brian J. Anderson

2013 Lilly Scholar Recipients



Kate O'Rourke
*Journalism and Economics/
 Mathematics Major*
 Indiana University



Kate Emmert
English Major
 DePauw University

The Community Foundation of Boone County is proud to have presented Kate and Kate with a four-year full tuition scholarship and in addition, each will receive a \$900 yearly stipend for required books and equipment. These women have represented Boone County impeccably, as they continue to excel in academics and their college communities and we are proud to help them achieve their dreams.

Not surprisingly, both women have had exceptionally successful starts to their college careers, in both academics and activities. Kate Emmert, currently studying English at DePauw University, has served as a DJ for campus radio station WGRE and as Artistic Director of the DePauw University Keynotes, an all women a capella group. She has volunteered in the Greencastle community, and spent her winter term on a service trip in El Salvador.

Kate O'Rourke is majoring in Journalism and Economics/Mathematics at Indiana University. She has had great academic success, receiving the University Founders Scholar award. In addition, she was initiated as a member of Chi Omega Sorority and served as a reporter for the Indiana University Student Television. This summer, she has returned to Boone County to work as the site director of Witham YMCA's summer day camp.

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 ZHS Senior Orchestra Class of 2013
 Zionsville Band & Orchestra Patrons
 Zionsville Education Foundation
 Zionsville Police Department
 Zionsville United Methodist Church
 Zionsville Volunteer Fire Dept.
 Zionsville Women's Soccer

Making a Difference With Us

Apply for a Grant



Arts and Culture



Education



Community Development



Health and Human Services

The Foundation is interested in supporting efforts in the above areas that address the root causes of clearly defined needs in Boone County. For more information, including our grant guidelines, visit our website: communityfoundationbc.org/grants/how-to-apply

Give Back

When you make a gift to the Community Endowment fund, you support a wide variety of charitable interests and allow the foundation to continue to meet the changing needs of the community. You can also make a planned gift or choose to start a fund of your own, from which grants can be made once the fund reaches \$5,000.

Fund Types

◉ *Scholarship*

◉ *Donor Advised*

◉ *Field of Interest*

◉ *Designated*

We offer a variety of fund types to best suit your giving. To learn more about your options to help our community, contact Jen Pendleton at 317.873.0210.

The Community Foundation of Boone County unites people, organizations and philanthropy to create a thriving community for all. We:

- **Engage** the community and educate citizens on how they can make a difference here at home.
- **Invest** in people, programs and organizations that transform lives and communities.
- **Lead** a vision for collaborative solutions to address the root causes of challenges facing our community.
- **Forever.** The establishment and growth of permanent endowment funds will strengthen Boone County for generations to come.

Since 1991, the Community Foundation has granted \$19 million back to Boone County. By our community, for our community – forever.

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**Community
Foundation**
of Boone County

Community Foundation of Boone County
60 E. Cedar Street • P.O. Box 92
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