

REPORT TO THE COMMUNITY



If Everyone Gave



Imagine the possibilities...

Generosity

Just 5%. We live in a unique time. Studies show that we live in a window of ten years when a great deal of wealth will be passed from one generation to the next. The dear people of the Greatest Generation fought the big war and those on the home front did their part to provide resources needed to obtain victory. Following WWII, businesses were born and grew. The economy began to thrive and formal philanthropy practices took root. Men and women of this era were hard workers, saved what they earned, but gave generously to causes they cared about. They shared these values with their children. As these individuals pass their wealth to those of us who are considered Baby Boomers, we have an opportunity to make a choice...the choice to pay it forward and to give a little of what we receive for the greater good. How about just 5%?



Sometimes, we Baby Boomers are referred to as the "Me Generation," but we have an opportunity to dispel that label and to set an excellent example of generosity to Generation X and the Millennials. If each of us gave just 5% of our assets to funds at a charitable endowment like the Hancock County Community Foundation (HCCF), the income earned would be life changing for causes we care about. For instance, community development funds created for the benefit of Hancock County would provide HCCF the flexibility to address some of our most pressing needs. Hunger could be eliminated, small towns could be revitalized, and every graduating student could receive financial assistance to attain a post-secondary credential. The opportunities would be endless, if only we each gave just 5%.

We encourage you to view our Annual Report as an opportunity to learn more about what can happen when one makes a philanthropic commitment...of any size. Woven throughout are trivia questions whose answers can be found at giveHCgrowHC.org. The journey begins with an opportunity for you to watch a very short video where you will find the answer to how much more our community, and the organizations who serve it, will be enhanced when you give just 5% to a permanent charitable fund. Together we can make a difference...forever.

Thomas N. Seng

Thomas N. Seng
Board Chair

Mary Gibble

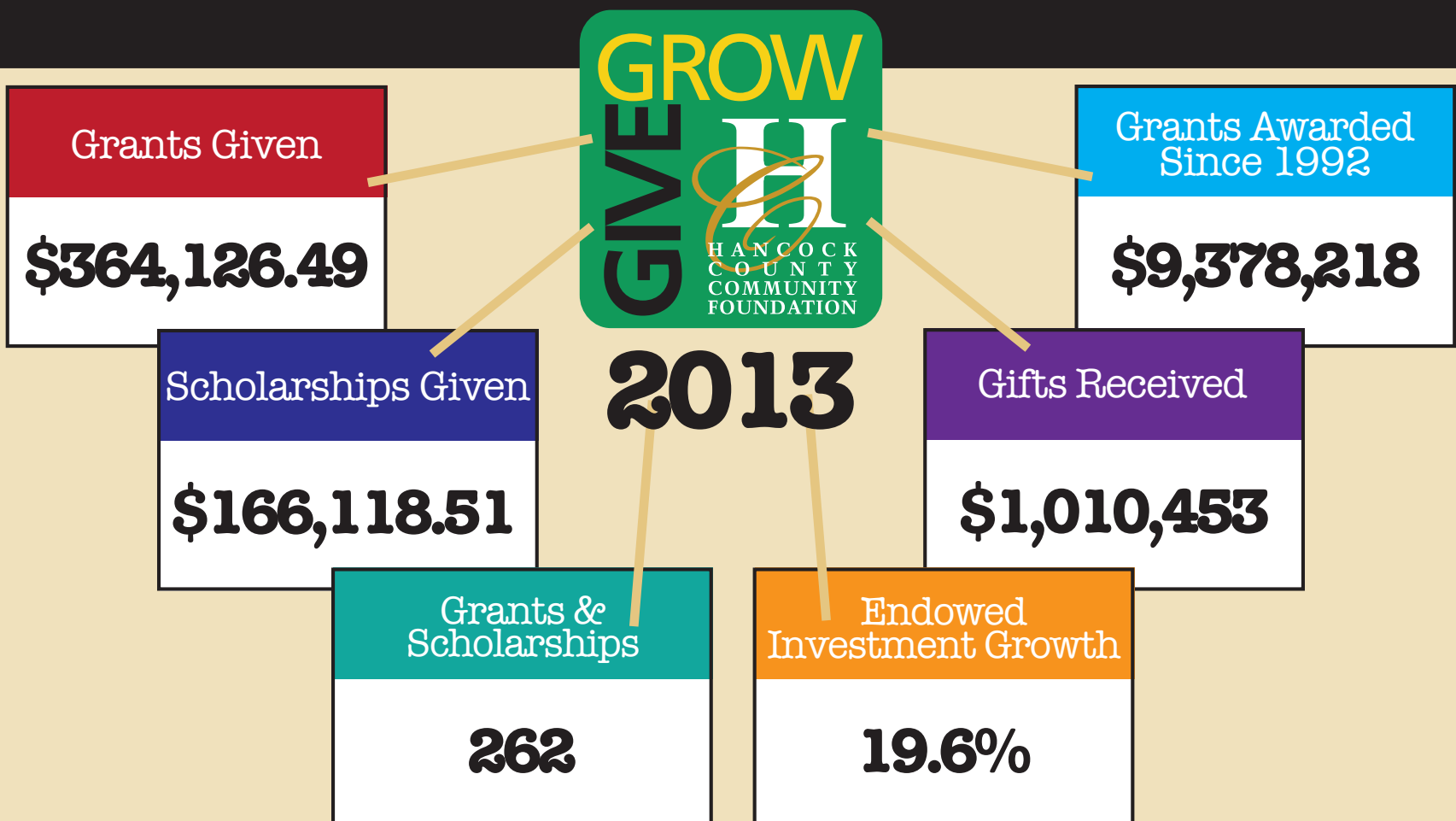
Mary Gibble
President

?

How much could HCCF grant if everyone gave just 5% over the next 10 years?

ANSWER:
giveHCgrowHC.org

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Trivia Game Instructions:

- 1) Start on the front cover with the word DREAM; then get READY; SET; GO!
- 2) Read the first story titled "Generosity". Upon completion, "draw" the corresponding trivia card and imagine the possibilities.
- 3) From there, visit giveHCgrowHC.org and click the corresponding game board located in the slider of the homepage.
- 4) You will land on a page with seven trivia cards. Click the card that corresponds with the story. In the "Generosity" story's case, it will be purple.
- 5) Discover the answer!
- 6) Repeat until you have read pages 1-7, visited the website, and clicked on all corresponding trivia cards.
- 7) Upon discovery of all seven trivia card answers, complete the form and submit the game card.
- 8) **The first 100 participants will receive a fabulous prize!**





hen one thinks of words to describe Howard and Linnea Green, several come to mind...perhaps Soccer, Teacher, Iowa, Elanco, and Cows? Well, yes, but how about Faithful, Generous, Selfless, and Kind? Definitely! These are the words that best describe the couple that established a charitable endowment fund at HCCF in 2011. Since that time, they have been intentional in growing it and as a result saw the fund make its first grants this year.

What motivated the Green's? "Basically, it comes down to the fact that we are very grateful for what we have been able to do through our involvement in church, work and the community. We want to give back with our time, talent and treasure. Okay, so I don't have so much talent," laughed Howard.

When Howard's father and Linnea's mother passed away within a year of each other, it allowed for them to reflect on their parents' lives and the examples they had set. They each received estate gifts, giving them the opportunity to consider how they might further causes for which they are passionate, while honoring their parents' memories. Howard and Linnea established a designated fund to support four organizations perpetually.

Today, Howard and Linnea are seeing their fund at work. Although the Green's established an endowment fund during their lifetime, they have included the Howard A. and Linnea A. Green Charitable Endowment as a beneficiary of their living revocable trust. "We chose HCCF because of the goals of organization, the low fees associated with maintaining and growing the fund assets, and because we know they will invest our funds responsibly," shared Howard. "I hope we will be as good of an example to our kids as our parents were to us. *Community* is important and the Hancock County *Community* Foundation is a great place to start."



Grateful

"We hope that through our giving, others will benefit well past our short time on earth."

?

What four charitable organizations will benefit from Howard and Linnea's generosity?

ANSWER:
giveHCgrowHC.org

Hancock County Community Foundation, Inc.
STATEMENTS OF FINANCIAL POSITION
December 31, 2013 and 2012

	2013	2012
ASSETS		
Cash and cash equivalents	\$ 626,513	\$ 1,636,405
Investments	23,652,007	18,858,718
Accounts receivable	716	-
Pledges receivable	13,450	3,000
Prepaid expenses	23,172	23,622
Property, building and equipment, net	888,949	875,082
	<u>\$25,204,807</u>	<u>\$ 21,396,827</u>
LIABILITIES		
Accounts payable	\$ 9,725	\$ 8,271
Grants payable	53,939	38,640
Deferred revenue	5,019	-
Annuity reserves	189,525	208,908
Agency funds	192,830	149,294
Total liabilities	451,038	405,113
NET ASSETS		
Unrestricted	569,387	(61,031)
Temporarily restricted	4,472,480	2,191,692
Permanently restricted	19,711,902	18,861,053
	<u>24,753,769</u>	<u>20,991,714</u>
	<u>\$25,204,807</u>	<u>\$ 21,396,827</u>



Gifts are professionally invested with the following objectives:

- Preservation of permanent assets (endowment funds);
- Protection of these assets from inflation; and
- Enhancement of the fund assets through market appreciation. The Foundation annually distributes a portion of each fund's generated income as designated by the donor to meet the needs of their favorite charitable causes or organizations both now and forever.

Hancock County Community Foundation, Inc.
STATEMENT OF ACTIVITIES
Year Ended December 31, 2013

	2013			
	Unrestricted	Temporarily Restricted	Permanently Restricted	Total
SUPPORT AND REVENUE				
Contributions	\$ 20,802	\$ 138,802	\$ 850,849	\$ 1,010,453
Administrative fee income	258,293			258,293
Investment income	200,743	493,233		693,976
Realized gains on investments	324,940	697,612		1,022,552
Unrealized gains on investments	543,169	1,477,325		2,020,494
Change in gift annuity reserve		(11,607)		(11,607)
Change in cash surrender value of life insurance		411		411
Rental income	27,155			27,155
Farm income	29,162			29,162
Loss on disposal of assets	(804)			(804)
Other income	46,847			46,847
	1,450,307	2,795,776	850,849	5,096,932
Net assets released from restrictions				
Restrictions satisfied by payments	514,988	(514,988)		
EXPENSES				
Program services				
Grants and scholarships	530,245			530,245
Program expenses	180,997			180,997
Supporting services				
Management and general	148,042			148,042
Investment trustee fees	76,744			76,744
Administrative fees	256,694			256,694
Development expenses	142,155			142,155
	<u>1,334,877</u>			<u>1,334,877</u>
CHANGE IN NET ASSETS	630,418	2,280,788	850,849	3,762,055
Net assets at beginning of year	(61,031)	2,191,692	18,861,053	20,991,714
Net assets at end of year	<u>\$ 569,387</u>	<u>\$ 4,472,480</u>	<u>\$ 19,711,902</u>	<u>\$ 24,753,769</u>

Complete Independent Auditors' Report and Notes to Financial Statements are available. To obtain, please call (317) 462-8870 to request a copy.

Enhance



HCSS and HART now reside on 1.67 acres on Fields Boulevard equipped with a 14-bay garage and 4,000 square feet of office space.

The boxes had been packed, the furniture moved, and all that was left to do, was say good-bye. Linda Hart, Executive Director of Hancock County Senior Services (HCSS) and Hancock Area Rural Transit (HART), was set to leave a building she and her staff had called home for thirteen years. The organization had simply outgrown 312 E. Main Street, Suite A.

For years, the organization shared space with HCCF in downtown Greenfield, but from 2000-2013 the staff had grown from nine to 35. They increased their fleet of vehicles from three to 12 and their client base exploded from 344 to 1081. HCCF recognized the need to grow with HCSS to support its ability to serve; so in 2004, we purchased property to expand the parking lot, and in 2006, dedicated additional office space.

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How has HCSS expanded their services since moving?

ANSWER:
giveHCgrowHC.org

Even with those efforts, it became obvious that HCSS would need to acquire a facility more suited to its needs. In 2011, they began a \$1.5 million building campaign entitled "We Don't Know What We'd Do Without You," a sentiment shared by many whom the organization has served. They applied to UWCI's Capital Improvement Program for a 1:1 match from Lilly Endowment contingent upon raising local funds. HCCF was pleased to support the effort with a \$10,000 grant. In addition, we have granted more than \$100,000 to HART and HCSS for programs and operating expenses since 1994.

Although we were sad to lose such an excellent neighbor, we are honored to enhance HCSS' and HART's ability to serve the community.

Grants Make a Big

Donor Designated Grants

50 Grants to Nonprofits Across the US - \$197,016.72

Capital Improvement Grants

Hancock County Enrichment Fund
Hancock Co. Senior Services - \$3,333.33

Corporate Advised Grants

NineStar Connect Ray of Light
Special Olympics Hancock County - \$1000

Donor Advised Grants

Armstrong-Maple Family Fund
Central Indiana Land Trust - \$400
Town of Fishers - \$100
Hancock Co. Community Foundation - \$300

John C. Beeson Humanitarian Fund
Life Choices Care Center - \$3000
Love INC of GHC - \$3000

Dale and Eva Miller Family Fund
Edelweiss Equine Assisted Therapy Center, Inc. - \$2575

Pearson and Jeannine Miller Fund
Hancock Co. Community Foundation - \$12,092
Mt. Vernon Education Foundation - \$1000
Wabash Conference - FMCNA - \$8000

Walter Mitten Family Fund
Hoosier Veterans Assistance Foundation - \$500

Walker Cancer Survivors Fund
Hancock Regional Hospital - \$464.64

White Family Foundation Fund
Healthy Communities Henry County - \$2000
Jane Ross Reeves Octagon House Foundation - \$6100
Knightstown Public Library - \$1500
Shirley Community Visionaries - \$4000
Town of Shirley - \$1500
Town of Shirley - \$1000
Town of Shirley - \$600
Town of Wilkinson - \$3000

Wortman Family Fund
Hancock Co. Community Foundation - \$1000
Hancock Co. Senior Services - \$1500
Hancock Regional Hospital Foundation - \$2000

Education Grants

Eastern Hancock Education Foundation - \$5,978.16
Greenfield-Central School Foundation - \$5,855.40
Mt. Vernon Education Foundation - \$6,533.81
Southern Hancock Education Foundation - \$3,907.63
FAFSA Days - \$4000
Hancock Co. LINK - \$19,949

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Where is Edelweiss Equine Assisted Therapy's new home located?

ANSWER:
giveHCgrowHC.org

Transform

Change can be difficult and challenging, but also truly transformational. In the spring of 2013, Edelweiss Equine Assisted Therapy moved to a new location. After months of planning, the property, owned by HCCF, thanks to the generous donation of the late Lewis Strahl, was staged to be Edelweiss' new home. The organization's staff and volunteers rolled up their sleeves and began the hard work of transforming a grazing pasture to a safe, functional, aesthetically pleasing, therapeutic riding facility. Three feet of manure was removed from the 100 year old barn, structural reinforcements made, new doors installed, and a new coat of paint applied. Fencing was repaired, new posts and hot wire installed, and the pasture has been strategically mapped to provide adequate space for rotational grazing. In addition to becoming Edelweiss's new landlord, we have granted \$70,300 to them since 2004. Executive Director Shirley Mascoe says, "Our partnership with HCCF has provided Edelweiss immediately with adequate land for our herd and the multi-year lease agreement will provide adequate time for the organization to raise money for the infrastructure so that Edelweiss can provide year-round services."



Before and After photos of Edelweiss Headquarters

Difference!

Field of Interest Grants

Addictions and Substance Abuse Education and Treatment Fund
Families First Indiana, Inc. - \$4485
Hancock Co. Community Corrections - \$700
Hancock Co. Drug Court - \$1000
 William and Mary Katherine Kingery
 Friends of Domestic Animals Fund
Frenzy Animal Rescue, Inc. - \$2500
Greenfield Hancock Animal Management - \$6000
Hancock Co. Humane Society - \$6000
Partners for Animal Welfare Society - \$2500

Arts and Culture Fund
KidsPlay, Inc. - \$576
 Hanson Family Fund
Nameless Creek Youth Camp - \$1995

HCCF-Rotary Club of Greenfield Partner Grants

Court Appointed Special Advocates (CASA) - \$2000
Edelweiss Equine Assisted Therapy Center, Inc. - \$1250
Families First Indiana, Inc. - \$1250
First Steps South East Indiana - \$1000
FUSE - \$1000
Hancock Co. Food Pantry - \$1500
Hancock Co. Senior Services - \$2000
Hancock Henry Community Youth Center - \$1250
Hancock Hope House - \$2000
Love INC of GHC - \$2000
Mental Health Partners of Hancock County - \$1250
Purdue Extension Hancock County - \$1250
Royal Family Kids Camp of Central Indiana - \$1000

Office Space Grants

Children's Bureau, Inc. - \$7,488.53
Hancock County LINK - \$6,643.43
Mental Health Partners of Hancock County - \$9,436.95
Women's Fund of Hancock County - \$3756

Proactive Grants

Alternatives Inc. of Madison Co. - \$2000
Kenneth Butler Memorial Soup Kitchen - \$2000
Meals on Wheels - \$2000
PARCS, Inc. - Park Advocacy Research & Conservation Society - \$500

For information on grant guidelines and application opportunities, visit giveHCgrowHC.org, **Grants Tab**



From top:
 Danielle Daugherty, LINK
 Kara Harrison, MHP
 De'Von Kissick Kelly, WRC

What are the respective missions of The Children's Bureau, Mental Health Partners of Hancock County, Leaders in Navigating Knowledge, and the Women's Resource Center?
 ANSWER:
giveHCgrowHC.org

What are two of the most important features an organization must possess in order to reach those that need their services?

Accessibility and visibility! When HCCF invited a select group of nonprofits to apply for Office

Space Grants, those in need of both virtues were identified for the invitation.

But even more important, was how the services of these organizations' would fit into our initiative to empower women and their families to become self-sufficient. Indeed, we identified an opportunity to align our desire to further the initiative, address a physical vacancy that needed to be filled, and provide much needed funding to enrich vital organizations.

Renovation began in March of 2013 and by June of 2013, HCCF welcomed The Children's Bureau (Amanda Swindell unavailable for photo), Mental Health Partners of Hancock County (MHP), Leaders in Navigating Knowledge (LINK), and the Women's Resource Center to 312 E. Main Street, Suites A, D, E, and F. Together, they make a powerful team with like-minded missions. The four organizations reside only feet from each other and, where appropriate, are connecting each other's clients with fellow services. In their new location, they are accessible to the community and the awareness of their organizations is heightened through their visibility.

Each of the four nonprofits were awarded grants totaling \$27,324.91 to offset the expense of rent over the next three years: 75% of the expense in year one, 50% in year two, and 25% in year three. All are expected to be in a position to independently meet the full expense of rent at the onset of a new three year lease.

Welcome

The difference made when HCSS and HART moved from HCCF was a bit shocking. What was once a very busy parking lot full of vehicles, became a quiet piece of asphalt leading to the back of a building that had remained relatively hidden ... and it

wasn't pretty. It was obvious, that for the new organizations moving in, we needed a more welcoming entrance for the clients they serve. Unfortunately, our resources for the building had been used to renovate the interior from one suite to four. Thankfully, Pearson and Jeannine Miller recommended a grant from their Donor Advised Fund to HCCF to offset costs related to new siding, a new porch, shutters and lighting. Two air conditioning units were moved to the roof and concrete pillars were installed to guard the entrance from approaching cars. Says Pearson, "With schematics, plans, and estimates in hand, Mary shared with us the need to improve the appearance of the north entrance. We said an immediate "yes" to her challenge. We are privileged to share with the Community Foundation, the social service agencies, and the county's residents this new 'front face' of HCCF and its tenants."

What is a Donor Advised Fund and how does it work?
 ANSWER:
giveHCgrowHC.org



Before and After photos of HCCF's North Entrance



“We are pleased to be able to have this opportunity to help our community perpetually through the Community Foundation,”

Leon Wilson, 1995

In 2013, HCCF received three bequest gifts, creating permanently endowed funds that will soon provide a perpetual stream of income for charitable causes. The Community Foundation’s role is to protect and grow the gifts through careful investment practices and administer the funds’ charitable purposes for generations to come.

Lifetime members of Hancock County, Leon and Minnie Wilson founded Leon Wilson Real Estate in 1964. Through years of hard work, the humble couple grew a successful business, and as a result, felt compelled to leave a legacy in the community that had been so good to them. In August of 1995, Leon and Minnie established a Charitable Remainder Unitrust, a vehicle that provided them lifetime income, with the intent of remaining assets being transferred to the Leon and Minnie Wilson Charitable Endowment Fund at HCCF, upon their deaths. As a result of their generosity, grants will be made perpetually to The Arc

of Hancock County, Shares Inc., and to HCCF for community grantmaking.

Esther Barnhart Cook graduated from Eden High School in 1934 and from Ball State Teachers School in 1937 at which time she began a long and treasured teaching career in Hancock County. She taught children at New Palestine Elementary, Eden Elementary, and Wilkinson Elementary where she retired in 1978. It’s no wonder, that when planning her estate, she named two funds at HCCF as a beneficiary of her will. As a result, students enrolled in Ball State University’s elementary education program will receive scholarships in her name and Hancock Regional Hospital Foundation will receive grants for operating support.



5



Bill and Betty Frick were parents of four children, grandparents to thirteen grandchildren, and great grandparents to 32! Their love of family is reflective in their generosity. In addition

to making annual gifts in memory of their grandson Mike’s birthday for many years, they named HCCF’s Mike Johnson Memorial Scholarship Endowment Fund as a beneficiary of their now mature trust. Since the fund’s establishment in 1994, the scholarship has been awarded to 19 Mt. Vernon students.

?

How easy is it to establish a fund that creates a legacy gift for my favorite charitable causes?

ANSWER:
giveHCgrowHC.org

The John Hancock Legacy Society Members

Mrs. Jean Bardonner
*Mrs. Martha Beckenholdt
Ms. Karen Beeson
Mr. and Mrs. Mike Blaisdell
Mr. and Mrs. Tom Bloodgood
Ms. Doris Bond
Mr. and Mrs. Michael D. Broome
Mrs. June M. Brune
Mr. Dennis and Mrs. Evelyn Chapman

Mrs. Wilma Clements
*Mr. Rollin J. Cossey
Mr. and Mrs. Bert Curry
Dr. and Mrs. Michael Day
*Mrs. Betty Dunlavy
Mr. and Mrs. Richard Dunlavy
Mr. Howard and Mrs. Linnea Green
Dr. and Mrs. Christian Gries
*Miss Dorothy Helfenberger
Dr. Charles and *Mrs. Betty Jordan

Mr. Clark and Mrs. Grace Ketchum
*Mrs. Nancy H. King
Mr. and Mrs. Jack McKinney
Mr. and Mrs. Bernie Miller
Mr. James W. Miller
Mr. and Mrs. Pearson L. Miller
Mrs. Lois C. Myerholtz
Ms. Audrey Ortel
Mr. and Mrs. Rick Roberts
Mr. and Mrs. D. Mark Robertson

*Mr. and Mrs. Armin Schramm
Ms. Gloria J. Shamblin
Mr. Ed Szymanski
Dr. Robert and Mrs. Karen Tarver
Mr. Ed and Mrs. Sally Veenhuizen
Dr. Carol Nelson Watson
Ms. Cheryl Wilfong
*Mr. Leon and Mrs. Minnie Wilson
*In memoriam

The Legacy Properties of HCCF

HCCF has been honored to receive gifts in the form of property. In 1999, we received the Pasco Funeral Home which now serves as the beautiful home of our office and that of another six nonprofits. Shortly thereafter, thirty acres of woods, now known as the Jacob Schramm Nature Preserve, and in 2009 the gift of a 155 acre farm. To best address the unique stewardship practices required, HCCF created a supporting organization. Similar to a for-profit LLC, a supporting organization has its own Board of Directors, but supports the public, charitable work of the Community Foundation.

On June 7, 2013, Legacy Properties of HCCF was incorporated in Indiana. Through its establishment, HCCF is better positioned to accept, purchase, hold, sell, and manage real and personal property for the benefit of the Community Foundation and its mission to further our donor’s charitable interests. The supporting organization allows HCCF to manage gifts of property while separating property-related liabilities from endowed assets.

HCCF is grateful to receive and steward gifts of revenue-producing property for charitable purposes. If considering a gift of land to support your favorite charitable causes, please contact Mary Gible, President.

Caring for Farmland

HCCF takes its role as a property steward very seriously. In 2009, HCCF became the owner of a farm donated by Lewis Strahl. Income earned from the property supports scholarships and the work of his church. In addition, HCCF also re-invests a portion of the income back into the property to ensure the land remains a lasting treasure. Steps taken to care for the gift of land from Lewis include:

- Researching, determining, and collecting cash rent at reasonable, responsible rates
- Hiring a local farmer to tend the tillable property
- Conducting annual soil testing
- Implementing a three year fertilization plan to improve soil quality and crop production
- Repairing field tiles
- Repairing or removing fencing as needed
- Clearing ditches
- Collaborating with neighbors

One can rest assured that HCCF will honor future gifts with the same care and concern for property while remaining true to the donor’s charitable intent.

The Community Foundation Board of Directors

Front row: Chris McQueeney, Teri Dunlavy, Linda Muegge, Stephanie White-Longworth

Back row: Lorraine Ewing, Barbara Campbell, Bob Bogigian, Sandra H. Miller, Tom Seng, Adam Schultz, Fred Powers, P. Jon Miller, Wayne Beck, Tim Clark, Josh Daugherty



Not Pictured: David Dellacà, Jim Greig, Debi Hill, Leah Janes, Florence May, Susan Nichter, Bill Weldon

The Community Foundation Staff



Mary Gibble
President



Marie Felver, CPA
Finance Officer



Alyse Vail
Grants &
Community
Investment
Officer



Michelle Leonard
Advancement
Officer



Kari Sisk
Scholarship
Program Officer

Give Where You Live, Grow Where You Live

The Hancock County Community Foundation was created by and for the people in our local area. Its core purpose is to help you help others.



People of modest means stand side by side with those of great wealth to form a community philanthropic foundation that is strong and deep beyond measure. Anyone can be a philanthropist! The Community Foundation provides numerous giving options, all of which make an impact, no matter the size of gift!

Hancock County Community Foundation

312 E. Main Street, Greenfield, Indiana 46140 • 317.462.8870

giveHCgrowHC.org

2013 Annual Report Sponsored by:



Make a Difference just 5%

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