

20 Years of "Looking Forward. Giving Back."

by Cheryl Keim

Winter 2011

A QUARTERLY
NEWSLETTER FOR OUR
DONORS AND FRIENDS
VISIT OUR WEBSITE
www.mccf-in.org

ON THE WEB

- Scholarships Applications
- Grant Applications
- Monthly listing of Honor and Memorial Gifts

DATES TO REMEMBER

- March 4** - Deadline for most scholarship applications, 5:00 p.m.
- March 15** - Initial deadline for \$20,000 20th Anniversary Grants
- April 1** - Deadline for Tandy and Pearson scholarship applications
- April 12** - MCCF Open House, 5:00 p.m. - 7:00 p.m.
- April 21** - Volunteer of the Year nominations are due

2010-11 MCCF BOARD OF DIRECTORS

Mr. Roy Kaser, President
Mr. John Tidd, Vice President
Ms. Susan Smith, Secretary
Mr. Dale Petrie, Treasurer
Ms. Amy Cooper
Mr. Tony Cosenza
Ms. Nancy Doemel
Mr. Phillip Littell
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Mr. Tom Mellish
Mr. Morris Mills
Dr. Janet Rucker
Ms. Anita Rupar
Ms. Nancy Sennett
Ms. Chris White

There is a reason that "Looking Forward. Giving Back" is our tag line. It describes the very spirit with which this organization was founded and in which it has developed and continues to grow. It is also the spirit we plan to embrace as we celebrate our 20th Anniversary throughout 2011.

It is not possible to commemorate this occasion without recognizing Lilly Endowment Inc. With Lilly's initial "look forward", their goal was to help communities establish a legacy of self-reliance. To do that, they were prepared to "give back" to communities across the state of Indiana. They set out in 1990 to help Hoosier communities establish or strengthen community foundations through the creation of Community Foundation GIFT (Giving Indiana Funds for Tomorrow). This fifteen-year effort included a commitment of \$47 million and a wide array of technical support such as consultation, seminars and reference materials in addition to a series of generous matching grants for asset building, programs and operating. Through their vision and generosity, every county in the state is now served by a community foundation.

With Lilly's support and the vision and fortitude of many local citizens, Montgomery County Community Foundation was established in 1991. In a letter addressed to community leaders outlining this challenge, dated January 10, 1990, Mayor Phil Michal wrote that he "couldn't think of a community with a stronger sense of self-reliance than this one." After several meetings with Lilly officials and various community leaders, the process began and the Articles of Incorporation were signed on August 6, 1991. Fundraising began right away and by 1992 the board was able to award \$2,095.00 in grants to nonprofit organizations. But the work didn't end there because a foundation is a living organization. We continue to assist donors in achieving their charitable goals thereby enabling the foundation to continue awarding grants and scholarships to deserving organizations and individuals in our community.

Because of the hard work of our leaders and the generosity of our donors and fund owners, we can fast-forward twenty years and find a foundation with \$32 million in assets. We are delighted that we have been able to award over \$11 million in grants and scholarships since our inception. In fact last year we reached a goal set for ourselves in 2006, and awarded \$1 million in a single year! From humble beginnings in borrowed office space with no staff,

MCCF is now running smoothly with a staff of three full-time and three part-time employees in comfortable, street level office space in the heart of our county seat. And although we hold the number one spot in the state in terms of assets per capita, we will not sit back and rest on our laurels.

A common myth about foundations is that they are only for the wealthy. However, MCCF offers a Pathway Fund making it possible for most anyone to establish a fund over time. Funds can be established with as little as \$5,000.00. A Pathway Fund is a planned giving agreement that allows you to build a named fund over a five year period. Many of our well established funds have started in just that manner.

In 2010 alone, four new Pathway Funds were started. In January, the family of Specialist Brian Bowman, who lost his life in the Iraqi War, established a fund in his memory. Beverly Harpel established the Jim Harpel Basketball Scholarship Fund in memory of her husband, reflecting his value of youth and education as well as his passion for the game of basketball. David and Sheridan Hadley have established a fund to support nonprofit organizations promoting health and wellness, fitness, and recreational activities. Danielle Hamilton Birk established the M. Gaidene and Stan Hamilton Scholarship Fund in memory of her mother who was a local journalist and in honor of her father. Anyone may contribute to these or any MCCF Funds at any time. Such donations make meaningful gifts to honor or remember a special person or occasion.

To celebrate our anniversary we are "looking forward"... looking forward to what can be accomplished to make this great community even better. To support that, we are "giving back" some tools which we think will help strengthen the local nonprofits, the best agents of change that we have. One gift is the Nonprofit Learning Series and the other is a \$20,000 Anniversary Grant Series where we will award twenty, \$1,000 grants weekly. Details are inside this newsletter. Thank you one and all for making this celebration possible!

celebrating twenty years!
"Looking Forward. Giving Back."
1991 - 2011

2011 NONPROFIT LEARNING SERIES

Our community is blessed with many wonderful nonprofit agencies that perform their work quietly and efficiently to make Montgomery County such a great place to live. As we celebrate our 20th Anniversary this year, we want to do all we can to strengthen them so that they can become better yet. One such effort is a Non Profit Learning Series that we are co-hosting with Putnam County Community Foundation. There are eight workshops in all, the first four in Greencastle and last four in Crawfordsville. Residents of each county are invited to attend all sessions.

The workshops are appropriate not only for nonprofit agencies, but also for churches and units of government. All workshops are scheduled from 11:00 a.m. to 2:00 p.m. and include lunch all for the modest cost of \$15.00 if registered at least one week in advance. The cost is \$25.00 if registered less than one week in advance. All eight sessions are just \$100.00 if paid by February 21st. Presenters have been secured by the Indiana Nonprofit Resource Network and are each highly respected in their fields.

To register for the series and for the Greencastle workshops, email Marcus Whited at mwhited@pcfoundation.org or register online at www.pcfoundation.org. To register for the Crawfordsville workshops, register at www.mccf-in.org.

The Greencastle workshops will be held at The Inn at DePauw University, 2 West Seminary Street, Greencastle, IN 46135

The Crawfordsville workshops will be held at Crawfordsville Country Club, 3272 W. Country Club Rd., Crawfordsville, IN 47933

February 28th - What YOU Bring to the Table: Assessing Yourself, Board and Staff - Speaker: Wendell Seaborne, Seaborne Leadership

This highly-interactive seminar leads staff, volunteers and board to a greater understanding of their role and how to accomplish their dream of making a real difference in the lives of others. This workshop will lead participants through a series of personal and organizational assessments to identify strengths and opportunities for greater nonprofit service and intrinsic fulfillment. Embracing regular evaluations as part of the organization's governance standards can contribute to the board's overall teamwork and communication abilities. The evaluation process helps to reaffirm the board's contributions to the organization. It can also highlight areas where each director, the board as a whole, or the organization should improve – thus establishing a plan of action.

March 28th – The Top Twelve in Good Governance - Presenter: Dave Sternberg, Loring, Sternberg, and Associates

*Exceptional boards add significant value to their organizations. How does a board rise to this level? Are there standards that describe this height of performance? There are! These 12 principles of governance can transform your board (based on the *The Source by BoardSource*). Learn them, how to use them and become an exceptional board.*

April 25th – Creating a Realistic Development Plan for your Nonprofit Organization. - Presenter: Laura Edwards, Purdue School of Mechanical Engineering

With the multitude of media and information available to nonprofits on fundraising advice, organizations can be more overwhelmed than ever on deciding where to begin. Whether you are new to fundraising, or have experience in the field and are seeking a fresh approach to planning for your resource development endeavors, presenter Laura Edwards, Director of Development from Purdue University will focus on practical strategies and tactical steps for creating a viable fundraising plan for your organization. Discussions will include setting monetary and donor engagement goals, planning various fundraising approaches, using SMART strategies and objectives for measurable success, as well as touching on how incorporating annual appeals, major gifts, and planned gift opportunities into your plan.

May 23rd – Strategic Planning - Presenter: Mike Stone, Impact Strategies

A strategic plan is only as good as the thinking behind it. In other words, how an organization arrives at its strategic priorities matters as much as

what those priorities are. In this workshop, we will address three basic questions: 1) what, exactly, is strategy? How do you decide what is of strategic significance to an organization? How do you make strategy "stick" once it is developed? Case study examples and planning tools will be provided.

June 27th – Mission Focused Event Planning -Presenter: June Miller, Indiana Nonprofit Resource Network

This fast paced and interactive workshop will give you ideas and tools that you can begin using immediately to achieve the goals you set for your next special event. But first, we will take a critical look at the advantages of planning special events and how these events can support the mission of your organization. Who should attend: Executive directors and staff involved in event planning and/or fundraising; board members and other volunteers; event sponsors; anyone interested in learning more about event planning

August 22nd – Planned Giving - Presenter: Phil Purcell, Ball State Foundation

This interactive workshop will explain the most important tools and techniques of planned giving such as gifts of stock or land, bequests, life insurance, endowments - and more. Special attention will be given to share ideas that you can incorporate into an already busy schedule! Specific topics will include the role of your board to assure success, low budget marketing ideas that work and important policies and procedures. Please bring your questions too!

September 26th – Financial Accountability - Presenter: Miriam Robeson, Attorney at Law

In a tough economy and in the face of increased reports of fraud targeted toward nonprofit corporations, nonprofits are facing higher scrutiny for financial accountability to both the public and to funders (donors, granting organizations and the government). Nonprofits must become comfortable with tighter accounting practices in order to make best use of shrinking income and to prevent fraud. This program presents a dual focus to address today's financial accountability concerns:

- (1) A discussion of the minimum requirements for understanding nonprofit finances in order to maximize mission delivery in a climate of increased costs and static (or declining) income and*
- (2) Information and tools for securing both cash and physical assets against loss and fraud.*

October 24th – Dashboard Reporting: Building and Using an Organizational Dashboard to Focus and Track Organizational Performance

Presenter: Bryan Orander, Charitable Advisors

Do we measure what's important, or do we make important what we measure? Nonprofits have been attempting to create workable "dashboards" for years. Dashboards should start at the staff level and then flow up to the board. See how you can implement a new format developed through a 3 year project with 10 smaller nonprofits by CompassPoint in the San Francisco area. Intended Audience: Executive Directors, Senior staff, and Board members. Learning Outcomes: Attendees will have a good overall concept plus great handouts and on-line resources to explore assembling their own organizational dashboards.



Our ongoing mission is to enrich the quality of life in Montgomery County by creating a comfortable, convenient and cost effective means for donors to achieve their goals of charitable giving while fulfilling a variety of current and future community needs.

You're Invited!

Open House

Tuesday, April 12th
5:00 p.m.—7:00 p.m.
119 E. Main St.
Downtown Crawfordsville

Come see our new office space and help us kick off our 20th Anniversary Celebration!

Building tours, Refreshments,
and the drawing for the first of
twenty \$1,000.00 grants to be given
away in twenty weeks!
(see details below)

Seeking 2011 Volunteer of the Year

Volunteerism is a critical element to the survival of most not-for-profit agencies and MCCF wants to recognize some of the area's most dedicated volunteers. Once again, we are accepting nominations from local not-for-profit agencies the annual "Volunteer of the Year" award.

The purpose of the award is to honor someone special, who, through volunteer efforts, has made exceptional contributions to the community. The agency nominating the winner will receive \$1,000 in the volunteer's honor. Please send nominations in writing to MCCF explaining the volunteer's activities by 5 p.m. April 21st. The written nomination should detail the individual's volunteer activities, description of the individual's history of service, longevity of service, role within the organization and explain why the individual should be named "Volunteer of the Year". Address letters to: MCCF, P.O. Box 334, Crawfordsville, IN 47933 or email to cheryl@mccf-in.org.

All nominees will be recognized and the winner honored at the MCCF Annual Meeting, May 26th. Recent winners were: 2010 Deanna Durrett, League of Women Voters; 2009 Diane Cross, Mountie Mission; 2008 Bob Evans, St. Clare Medical Center Auxiliary; 2007 Carolyn Snyder, PRIDE and Christian Nursing Service.

\$20,000 to Celebrate 20 Years!

We believe that the most appropriate way to celebrate our 20th Anniversary is to make a gift to the very community which has contributed to our success. To do that we will be giving away \$1,000.00 each week beginning March 22nd at our Open House. The drawings will continue through August, the month the Articles of Incorporations were signed in 1991.

The awards will be made by random drawing. A simple one page application is available on our website and to be considered for all twenty drawings should arrive to us by March 15th.

MCCF Trivia

1. How many of the 15 founding board members can you name?
2. Which current board member was also a founding board member?

1. Richard Risine* (Pres.), Les Sommer* (VP), Nancy Doemel (Sec/Treas.), Mark Carriss*, Larry Cummings, Ruby Elliott, Marsha Gephart, Virginia Hays*, Esther Houston, Jane Kessler*, Dan McIlraith, Martin Morrison, Kenneth Newnum, John R. Roberts, Jr. and Richard Ward.
* Indicates individuals who are now deceased.

2. Nancy Doemel

The Board Spotlight Shines on...



Photo by John Zimmerman



SUSAN SMITH

MCCF is fortunate to have men and women in our community who are willing to share their time and talents serving on our Board of Directors. Our Board members are loyal to our mission and supportive of our goals and objectives and we are so grateful for their diligence. Because of their vital role at the Foundation, we'd like to give you a closer look at our Board by profiling one member in each of our newsletters. In this edition our Board spotlight shines on **Board Secretary Susan Smith**.

Susan has lived in Montgomery County for 32 years after moving here as a young bride. She met her future husband, Mark, while they were competing against each other showing Southdown sheep at the Indiana State Fair in 1974. I'm not sure who won that competition, but shortly thereafter they moved from show rings to wedding rings and Susan claims he married her for her sheep! I guess he's not "baa-shful" about that!

Mark and Susan have farmed the Hulet Farm, of which the Foundation later became trustee. They work another farm that is held in trust and live in the house on that farm, which incidentally is where Mark was raised. In addition to farming, they raise and show llamas and recently were invited to France to judge a French National Llama Show. Susan is employed at MutualWealth Management Group where she is a Trust Officer. Her office is conveniently located right next to the new office space of MCCF!

Susan enjoys being part of pro-active groups and so she was thrilled when asked to serve on the Board of MCCF. She finds fulfillment in working with the Board and their service in the community. She believes that the time and energy spent with your family, church, and community can make a difference in the lives of others and is time well spent towards leaving a legacy long remembered. The people of our community are what Susan considers Montgomery County's greatest asset because "they care, they are generous, and they are always willing to give of their time and resources."

Susan and Mark have two adult children, Kelly and Kyle, and one grandson, Kaden, who is the apple of Grandma's eye! Susan enjoys traveling, showing their llamas, reading, and spending time with family.

-Paula Reed

L. Ann Malott
Executive Director



Director's Notes

By the time January rolls off the calendar, most of us here in the Midwest have had just about enough of winter and its effects! Snow, while not defined by boundaries, blows and drifts and makes its way into the unknown without thought or reason. Its legacy is soon forgotten as temperatures warm and it changes course and melts away before our eyes. However, there are legacies that last and continue to give – regardless of the weather. They don't disappear like melting snow and they warm the heart, instead of freezing the toes!

I recently had the privilege of meeting with Danielle Birk, daughter of the late

Gaidene Hamilton. I knew Danielle when she was just a sweet little blue-eyed girl and I am impressed by the vibrant, mature woman that she has become. Perhaps even more impressive is her compassionate spirit and the fact that she treasures and nurtures the value of giving. She has chosen to honor her parents by starting a Pathway Plan in their name – an honor that will continue to give for many years to come.

However, Danielle was not the only one who has chosen to leave such a legacy of giving; there have been six new Pathway Plans started recently. Pathway Plans are designed so that if you are not in a position to meet the minimum amount for an endowed fund, you can establish a fund with an initial investment and then continue to build on it for 5 years. Once the minimum amount for a fund is established (\$5,000 for funds, \$10,000 for scholarship funds) you, as well as any family and friends that wish to do so, can continue adding to it at any time. And the beauty of it is you get to choose

the fund's purpose so that it reflects your passions and interests.

The most recent pathway plans benefit health and wellness activities, Christian youth camps, memorial scholarships, and more. Many current plans, as well as those that have become endowed funds, have been given in honor or in memory of a loved one. I can't think of a more loving tribute than one that doesn't stop giving. So unlike the snow that drifts and disappears, pathway plans are an intentional footprint in our community that continues walking well into the future. Speaking of the future, spring is coming - in fact, as of this writing, it is only 48 days away!



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