22ND ANNUAL REPORT TO THE COMMUNITY





## **Greetings!**

This, our 22nd Annual Report to the Community, focuses primarily on the financial nuts and bolts of the organization. By reading it, you can learn about our 18 new funds and the 150 grants we awarded; the \$2.5 million in gifts we received and the 405 donors who contributed them; and join us in celebrating the fact that we've recently topped \$20 million in total assets.

If you are interested in learning more, you can scan the QR codes to visit our website and read about the 220 component funds we manage and the scholarships and grants we award each year. We encourage you to visit our website at www. EWVCF.org, subscribe to our eNews, follow us on Facebook, or simply pick up a copy of our printed newsletter that goes into great detail about our many programs.

Being able to award grants is, ultimately, the reason we exist. We GATHER funds from donors, GROW those gifts through prudent investing, then GRANT what has been earned to deserving nonprofit organizations, schools, and students. The grants and scholarships we award make a difference in the lives of many people here in the Eastern Panhandle.

The photo on the front cover is from our Mini-Grant to Teachers program. Widmyer Elementary kindergarten teacher, Rebecca Lindsay, applied for a \$487.08 mini-grant to purchase electronic tablets, keyboards, and headphones to help her students learn to read.

There was considerable discussion at the Grants Committee meeting regarding the use of electronic tablets by such young children and the committee decided to support the teacher's request and provide the funding. Ms. Lindsey sent us the photo and a great final report stating, "These devices made a tremendous improvement in reading for all kindergarten students in my class. Each has improved in their reading level and because of the additional practice 17/20 students now meet the targeted benchmark for the end of kindergarten."

We are Investing in Our Future by awarding grants to help 5-year-olds learn to read and by working with donors who want to leave a lasting legacy for their favorite charities. Teamwork, collaboration, synergy, Whatever you want to call it, the effort expended to make things better in Jefferson, Berkeley, Morgan, Hampshire, and Hardy counties comes back to us many times over. For that, we are grateful.

Regards,

President



Michael Whal for Executive Director



Our Mission is to improve the quality of life for all people in Eastern West Virginia. The Community Foundation embraces the concept that people working together can make a difference. We seek a common philosophy whereby people recognize, understand, and act upon the benefits philanthropy brings to our community. We build permanent endowment, offer maximum flexibility to our donors, meet high professional standards, promote effective and efficient grantmaking, and strengthen charitable organizations in our community.

#### Staff

Michael Whalton, Executive Director Amy Pancake, Affiliate Director Felicia Fuller, Finance and Admin Manager Karin Hammann Dunn, Program Manager



Exe229 E. Martin St., Suite 4 Martinsburg, WV 25401 304.264.0353

#### **EWVCF Board of Directors**

Darlene Truman, President Lisa Welch, Vice President Bill White. Treasurer Charles "Chip" Hensell. Secretary Scott Roach, Past President Dan Anderson **Beth Brent** Michael Funkhouser Susan Caperton Chris Janelle George Karos Judi McIntyre Andrew McMillan Charlotte Norris Chris Palmer Ruth Pritchard Jan Wilkins David DeJarnett. Pro bono Legal Counsel



P.O. Box 40

Romney, WV 26757 304.822.7200

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Connecting Caring People with Community Causes

P.O. Box 1058 Moorefield, WV 26836 304.538.3431

#### **Hardy Advisory Committee**

Michael Funkhouser, Chair Tracey Ratliff, Vice Chair Lucy West, Secretary Sheldon Arbaugh Oscar Bean Lora Foltz Michael McDonald Robert Taylor Tim Thorne Yvonne Williams Angie Zirk 18
ENDOWMENTS
ESTABLISHED

220 COMPONENT FUNDS 5 COUNTIES SERVED

\$21.4 MILLION ASSETS BY FUND TYPE

8.1% INVESTMENT RETURN IN 2016

53 LEGACY SOCIETY MEMBERS

<sub>7</sub> 25 PARTNERS IN PHILANTHROPY

\$512,774 AWARDED IN GRANTS & SCHOLARSHIPS

102 MINI-GRANTS TO TEACHERS

150 GRANTS 8-9 AWARDED

76 SCHOLARSHIPS AWARDED

\$2.5 MILLION IN CONTRIBUTIONS

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**HOW IT WORKS** 

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## **18 ENDOWMENTS ESTABLISHED IN 2016**

## AGENCY FUND

Nonprofit organizations can establish an Agency Endowment at the Community Foundation. It's a simple and efficient way to build an endowment — and help create sustainability — for your nonprofit organization. The Community Foundation's experienced staff can also help your organization develop a campaign to build your endowment.

Our History, Our Community Fund – The board of the Jefferson County Historic Landmarks Commission established this fund to support a grant program for stabilization and maintenance of historic structures, and for the purchase and maintenance of battlefield land in the unincorporated areas of Jefferson County. Investment returns will be added to the fund until it reaches \$100,000 in value.

## **DESIGNATED FUNDS**

Establishing a Designated Fund allows you to support the good work of a specific nonprofit organization — a senior center, museum or virtually any nonprofit charitable organization. Because it's given through your Community Foundation, your gift provides the organization you select with funding and investment management services through the power of endowment.

John L. Burkett, III Memorial Fund – Established in memory of John L. Burkett, III, by his parents, this designated fund provides annual support to the United Way of the Eastern Panhandle Strong Families Endowment Fund.

Cool Spring Preserve Fund – When the board of the local nonprofit organization Craftworks at Cool Spring, Inc. transferred ownership of Cool Spring Preserve to the Potomac Valley Audubon Society in late 2016 the decision was made to provide funding to help maintain the rare plants and hydrology in the marsh, encourage natural forest regeneration in the woodlands, and control invasive species throughout the property. Annual distributions from the Cool Spring Preserve Fund will help cover some of these costs.

Goldie Gibbons Park Fund – Established with a legacy gift from Virginia Gibbons, the fund will help Berkeley County Parks & Recreation build and maintain the Goldie Gibbons Park on the site of Ms. Gibbon's homestead in Bedington, West Virginia. The facility is being created as a "fun place for families and dogs."

Katherine Burr Jackson Fund for the Peter Burr Farm – John League established this fund to honor his Aunt Katherine, a direct descendant of Peter Burr, to support the Peter Burr Farm, a property owned and maintained by the Jefferson County Historic Landmarks Commission.

## FIELD OF INTEREST FUNDS

By establishing a Field of Interest Fund, you can target your gift to address needs in an important and specific area of community life: Arts. Aging. At-risk youth. Historic Preservation. Conservation. You identify your personal interest area when making your gift; our board awards grants to community organizations and programs that are making a difference in the area you select. Your gift stays flexible enough to meet community needs in your interest area — even as they change over time.

Eastern Panhandle CARE Fund – Established by the board of the Eastern Panhandle CARE Clinic, the primary intent of the fund is to provide distributions to support West Virginia-based 501(c)(3) nonprofit organizations that provide health care services similar to those that had been provided by the CARE Clinic.

Eastern Panhandle Mini-Grants to Teachers Fund – The Berkeley County Industrial Park Development Fund advisors established this fund as a challenge to match other donors and create a \$50,000 endowed fund to support the Mini-Grants to Teachers program in Jefferson, Berkeley, and Morgan counties.

Arch Gleason Memorial Fund – Arch Gleason was a highly respected CPA who worked for two decades in Martinsburg before entering government service, first as the director of the West Virginia Lottery, then as secretary of the West Virginia Department of Transportation. For the past 22 years, Arch served as president and CEO of the Kentucky Lottery Corporation. When he passed away in July 2016, friends in the Eastern Panhandle established this fund to support programs that provide services to individuals with learning disabilities, special needs, autism, or similar challenges.

## DONOR ADVISED FUNDS

A Donor Advised Fund allows you to make a gift to the Community Foundation and remain actively involved in suggesting uses for your gift. You can work with the Community Foundation staff to suggest ongoing uses for the fund — targeting the issues you care about most. Grant awards are issued to charities in the name of the fund (or anonymously if you prefer). It's a simple, powerful and highly personal approach to giving.

Hardy County Community Foundation Heritage Fund – This fund was established to provide financial support to nonprofit organizations dedicated to preserving the heritage of the region.

Palmer Family Fund – Established by Mark and Sue Ann Palmer and their son Chris and his wife Trish, this fund will primarily support West Virginia-based nonprofit organizations.

**Fleming Family Fund** – Established with a generous contribution from Pat and Leigh Fleming, this fund supports Eastern Panhandle nonprofit organizations and other charitable programs.

## SCHOLARSHIP FUNDS

In creating a scholarship, you invest in your community's future and show students you care. Your Community Foundation provides the expertise to help you meet your personal goals and awards scholarships to deserving students. Your gift can help students — from preschool to postgraduate — achieve their lifetime dreams.

The Inspiration Scholarship Fund – Martinsburg native and nationally recognized motivational speaker Kristi Hedges established this scholarship fund in memory of Thelma Henry and Viola Hedges. High achieving, first in their family students from public schools in Jefferson, Berkeley, or Morgan counties who are planning on attending an out-of-state college or university may apply.

R.L. Johnson, Jr. Scholarship Fund – Established by his parents, this fund memorializes the life R.L. and his passion for basketball. Graduating seniors from Hampshire County who've played basketball during all four years of high school and demonstrate outstanding dedication to the sport and the team will benefit from this scholarship.

Paul Ropp Memorial Scholarship Fund – BB&T Wealth, trustee of the W. Paul Ropp Memorial Trust, established this fund at the Community Foundation to provide an annual scholarship to a deserving Martinsburg High School student. Mr. Ropp had directed that special consideration be given to a student who would be attending West Virginia University with the intent to major in a scientific field of study.

**South Jefferson Ruritan Club Scholarship Fund** – Established by the members of Jefferson County's oldest Ruritan Club, this fund provides renewable scholarships to support students from Jefferson County who are working toward a degree with a focus on agriculture or veterinary science.

**Fulton L. Walker, Jr. Scholarship Fund** – Family members and friends of Fulton L. Walker, Jr. established this fund in his memory to honor his achievements on and off the football field and to help a Martinsburg High student with proven financial need attend West Virginia University. To help build the endowment, supporters of the scholarship are organizing a golf tournament and several other fundraising activities.

West Virginia Wing – Civil Air Patrol Cadet Scholarship Fund – Martinsburg native Dennis D. Barron established this fund to provide scholarship assistance to members of the Civil Air Patrol Cadet Program in West Virginia. Priority will be given to Civil Air Patrol Cadets from the Martinsburg Squadron who are unlikely to receive the West Virginia Promise or other scholarships.

## UNRESTRICTED FUND

When you establish an Unrestricted Fund, your gift can address a broad range of local needs — including future needs that often cannot be anticipated at the time your gift is made. We evaluate all aspects of community well-being: arts and culture, economic development, education, environment, health and human services, neighborhood revitalization and more. The flexibility of your unrestricted gift enables your Community Foundation's program experts to respond to the community's most pressing needs, today and tomorrow.

Morgan County Community Impact Fund – This fund awards grants to support Morgan County West Virginia-based 501(c)(3) nonprofit organizations, churches, schools and government agencies that primarily serve distressed communities or economically disadvantaged individuals and families.

## **220 COMPONENT FUNDS**

The Eastern West Virginia Community Foundation currently manages 220 endowed funds. In 2016, donors established 18 new funds to serve their communities in a wide variety of ways, from scholarships to donor advised funds. More in-depth descriptions of all 220 EWVCF funds can be found on our web site.

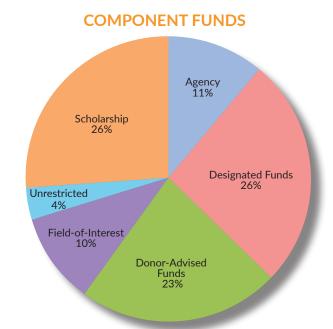
The Eastern West Virginia Community Foundation (EWVCF) has grown exponentially during the past several years and now holds 220 component funds with more than \$21 million in assets.

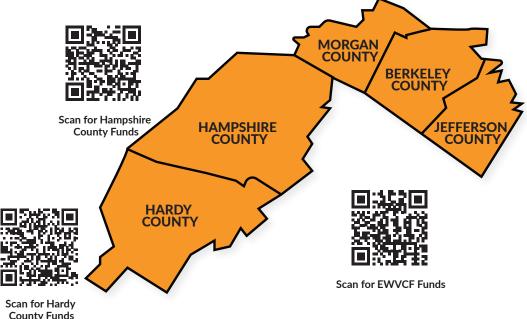
We have 57 Designated Funds, 57 Scholarship Funds, 50 Donor Advised Funds, 25 Agency Funds, 23 Field of Interest Funds and 8 Unrestricted Funds. These range from small start-up seed funds with just \$1,000 to funds of more than \$1 million.

## OUNTIES SERV

EWVCF proudly serves five counties of the Eastern Panhandle. Since 1995, Jefferson, Berkeley, and Morgan counties have been represented under the Eastern West Virginia Community Foundation banner. In 2006, we established our affiliate in Hampshire County, and in 2007, the Hardy County affiliate was added.

Our EWVCF Board of Directors oversees all operations, and the two affiliates are semi-autonomous with advisory boards for each. Information about all of the component funds can be found by navigating from the homepage of our website: www.EWVCF.org or by scanning the QR codes below. Funds that specifically benefit the affiliates are featured on the affiliate pages.





West Virginia, like the rest of the country, is in the midst of the biggest personal wealth transfer in history. The five counties served by the Community Foundation, Jefferson, Berkeley, Morgan, Hampshire and Hardy have more than \$20 billion in personal wealth today and more than \$5.2 billion will be transferred to the next generation during the coming 10 years.

If 5 percent of that wealth is set aside for community philanthropy, the Community Foundation will grow to more than \$260 million and will be able to award nearly \$13 million in grants to local charities every year.

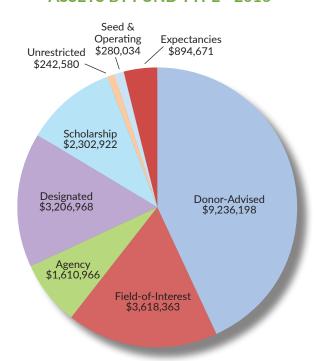
Although this is a lofty goal, other areas of the country have had great success with similar programs. Considering how generous West Virginians are, we believe we can help donors create lasting legacies that will benefit the Eastern Panhandle for generations to come





## \$21.4 MILLION ASSETS BY FUND TYPE

#### **ASSETS BY FUND TYPE - 2016**



Community Foundations help donors support favorite charitable causes and nonprofit organizations by creating permanent endowments that will last forever. Whatever your passion — be your alma mater, a local theatre or arts organization, daycare or recreation center, historical society or social services, education or recreation, youth or senior citizen program — a gift to the Community Foundation can make your generosity go on in perpetuity. By establishing an endowed fund or adding to an existing one, donors can continue a tradition of giving long after they are gone.

The power of compounding helps this organization thrive. We focus on long-term growth and award grants to charities from a portion of the investment gains. In 2016, with assets of just over \$21.4 million, we awarded \$512,774 in grants and scholarships, and in 2017 we expect to award over \$1.5 million.

To support the operations of the Community Foundation, each endowed fund is charged 1% annually (new scholarship funds are assessed a 2% fee because of the complexity of scholarships) These fees cover approximately 60% of our annual expenses. Additional operating income is derived from our Partners in Philanthropy program along with contributions from several generous individuals.

## 2016 Summary Financial Statement

The Eastern West Virginia Community Foundation's auditor, Yount Hyde & Barbour, PC, has issued a clean opinion on the financial statements ended December 31, 2016. You are welcome to download our 2016 audited financial statements and IRS Form 990 from our Website at www.EWVCF.org



Scan this QR Code to download our 2016 IRS Form 990



Scan this QR Code to download our 2016 Financial Report/Audit

## 8.1% INVESTMENT RETURN IN 2016

The Community Foundation enjoyed 8.1% return on investments in 2016. Assets held by the Eastern West Virginia Community Foundation for five years earned a 7.6% rate of return, and over seven years returns averaged 7.5%. EWVCF has a very active Investment Committee that meets quarterly to analyze investment performance, hear from our advisors, and review policies and procedures to assure best practices.

Special Thanks to our Investment Advisors for providing outstanding services at a greatly reduced fee of 35 basis points — just over 1/3 of one percent annually.

Bert McEldowney and Susan Cassidy of BB&T Retirement and Institutional Services

Leslie Crabill of BCT-Bank of Charles Town

Keith Unger and James "Rusty" Hudnall of

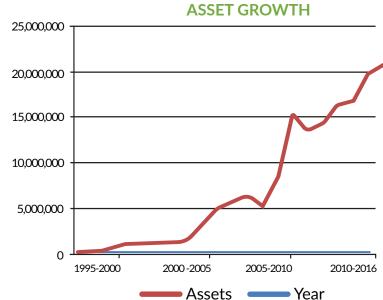
**City National Bank** 

Tom Peterson and Chenoa Everett of CNB Bank

Matt Kradel and Scott Rush of

First United Bank & Trust

Ned Worthington and Matthew Humphrey of **United Wealth Management.** 



## **53 LEGACY SOCIETY MEMBERS**

Legacy Society members are creating charitable endowments tomorrow by making planned gifts today. Recording one's charitable intentions also serves as a guidepost for family and friends, thereby establishing a simple way for loved ones to support nonprofit organizations and charitable causes which are near and dear to you.

There are various ways to make a planned gift, and we hope you will involve the Foundation in your gift before you make it. A planned gift is an extraordinary way to leave a lasting legacy to honor you, your family and your community. Often, the Community Foundation will not receive your planned gift for years to come, but we are here to help you plan for the future.

We encourage you to include your attorney, estate planner, and financial advisor in the discussion as you develop your gift plans. It's the best way to make certain your charitable vision is crystal clear, ensure the tax deductibility of your gift, and build your legacy. For more information and sample wording to help craft a legacy gift within your estate plan, download our EWVCF Bequest Wording document which will provide ideas that can help your attorney, CPA, or financial advisor.



Legacy Society donors have remembered the Community Foundation in their will or another form of planned gift. Please consider adding your name to this group by becoming a member of our Legacy Society today.

To discuss creating your personal legacy, please call the Community Foundation.

## **25 PARTNERS IN PHILANTHROPY**

The Eastern West Virginia Community Foundation enjoys the support of many businesses in the area. Our Partners in Philanthropy contribute amounts ranging from a few hundred dollars to \$3,500 per year and these funds pay for the Scholars & Donors Reception where we recognize area students who are receiving scholarships, our Mini-Grants to Teachers Reception in the fall, and the late summer Emeritus and Nonprofit Leaders Luncheon.

Our Partners in Philanthropy also fund challenge grants to help build the endowments of local nonprofit agencies, Community Workshops & Nonprofit Training programs, and new unrestricted county-based Community Funds.

Total contributions from our Partners in Philanthropy amount to more than \$40,000 annually and these funds are vital to the success of our many community outreach programs.

## **Cornerstone Sponsors**





WEALTH













BCT Bank of Charles Town • Dan Rvan Builders City National Bank • Gat Creek Furniture

Hampshire Affiliate Partners in Philanthropy

#### Cornerstone

Bank of Romney Northern Eagle Inc. Valley Health

#### Gold

**FNB Bank** SJ Morse

Hardy Affiliate Partners in Philanthropy

## Cornerstone

Northern Eagle Inc. Summit Community Bank

#### **Platinum**

Capon Valley Bank Foltz Litter, Inc. Pendleton Community Bank

#### Gold

The Grant County Bank Hawse Shop n Save Thorne & Keplinger

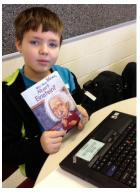
Dennis D. Barron Helen Jackson Bowser Walter and Mary Jo Ziler Brown **Robert Burke** John and Jacqueline Burkett Linda Case David and Dana DeJarnett Jerry L. Derflinger Richard S. Durham **Solomon Fine** Frank C. Fischer G. Scott Funkhouser Virginia L. Gibbons Conrad C. and MaryAnn Hammann **Eleanor Heishman Ruth Heishman** Fred and Denise Hollida John and Eleanor Houvoux Floyd E. Jacques **George Karos** James E. Keel J.Philip and Doris L. Kesecker Frank and Kitty Koepping Tia McMillan Arthur H. Miller C. David and Barbara L. Miller Nancy E. Needy M. Elizabeth Oates **Don and Amy Owen Robert Owens Buzz and Lisa Poland** Beth Raps, Phd Frederick B. Rice Lacy and Linda Rice **Doug and Joan Roach** Scott and Linda Roach Steven M. and Tina F. Roach Jennifer Roberts Paul Ropp Dan and Edith Sampson Myrtle J. Schneiderhan Elizabeth Shade Lester A. and Janet I. Smith Jane P. Snyder William L. and Bonnie M. Stubblefield Michael Barry Tallent **Brian and Darlene Truman** Paul and Lisa Welch Michael and Susan Hawkens Whalton John S. Wharton Helen Mae Wolford **Gretchen Wurzburg** 

Robert B. Yoe

# \$512,774 AWARDED IN GRANTS & **SCHOLARSHIPS**

A total of 150 grants and 76 scholarships were awarded by the Community Foundation in 2016. Funding for grants and scholarships comes from a wide range of programs including annual contributions, fund distributions, and legacy gifts. We thank all our donors who help us year after year as we provide vitally important funding to dozens of partner nonprofit organizations that serve the community.

The following grants were awarded by the Eastern West Virginia Community Foundation or one of our affiliates in 2016.







\$565.00 Capon Springs Fire Dept.

CASA of the

Neighbor to Neighbor

Catholic Charities of

MIL SOMA		
Amazing Grace Baptist Church	\$565.00	Capon Spring
American Cancer Society	\$1,500.00	Capon Valley
Animal Welfare Society of		Neighbor to N
Jefferson Co		CASA of the
\$13,000.00		Eastern Panha
Augusta Elementary School	\$870.00	Catholic Ch
Augusta Volunteer Rescue Squad	\$200.00	West Virginia
Back Creek Valley Elementary School	\$594.00	Charles Town
BE-Hive,		
A Family Inspiration Place, Inc	\$5,000.00	

Eastern Panhandle, Inc. \$870.00 \$200.00 West Virginia-EP \$594.00 Charles Town Middle School 5,000.00 **Beckley Area Foundation** \$700.00 **Bedington Elementary School** \$2,448.00 Berkeley Arts Council, Inc. \$713.00 **Berkeley County** \$3,000.00

BackPack Program,Inc. \$3,000.00 Berkeley County Humane Society Berkeley County Meals on Wheels \$1,000.00 **Berkeley County Schools Berkeley County Special Olympics** Berkeley Springs High School **Bethany Christian Services** Birthright of Charles Town

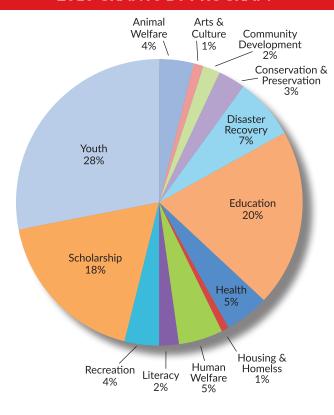
Blue Ridge Elementary Boys & Girls Club of the Eastern Panhandle **Burke Street Elementary School** C.W. Shipley Elementary School Camp Frame 4-H Association Capon Bridge Middle School

## 150 Grants Awarded in 2016

\$2,500.00 Children First Child \$700.00 **Development Center** \$252.00 Children's Home \$1,000.00 Society of West Virginia \$250.00 City of Romney \$500.00 Community Alternatives to Violence, Inc. \$10,500.00 Community Catalyst, Inc \$4,289.00 Community Combined Ministries \$1,208.00 /Kidz Power Pacs \$23,000.00 Community Fellowship Church

\$250.00 Community Networks, Inc.

## 2016 GRANTS BY PROGRAM



400000		
\$200.00	Contemporary American	4
	Theatre Festival	\$1,500.00
\$250.00	Days End Farm Horse Rescue, Inc	\$500.00
	Driswood Elementary School	\$1,000.00
\$3,000.00	Eagle Gridiron Gang Supporters	\$4,400.00
	Eagle School Intermediate	\$500.00
\$6,000.00	East Hardy Early Middle School	\$21,231.00
\$1,000.00	East Hardy High School	\$21,231.00
	Eastern Panhandle CARE Clinic	\$1,200.00
	Eastern Panhandle Young Life	\$2,300.00
<b>-</b> S	Eastern Regional Family	
	Resource Network	\$250.00
ln l	Eastridge Health Systems	\$2,500.00
	Edge Hill Cemetery	\$5,000.00
	Faith Christian Academy	\$500.00
	For the kids, By George	
	Children's Museum	\$500.00
	Girl Scouts Council of	
\$500.00	the Nations Capital	\$3,600.00
	Good Samaritan Free Clinic	\$15,000.00
\$3,000.00	Good Shepherd Interfaith	
\$125.00	Volunteer Caregivers	\$3,300.00
	Habitat for Humanity	
\$1,500.00	Eastern Panhandle	\$300.00
\$6,000.00	Hampshire High School	\$1,119.00
	Harpers Ferry Middle School	\$475.00
\$3,000.00	Hedgesville Elementary School	\$1,184.00
	Hedgesville High School	\$6,807.00
	Hedgesville Hounds	\$500.00
	~	

Hedgesville Little League	\$1,000.00
Hedgesville Middle School	\$1,221.00
Historic Shepherdstown	
Commission	\$2,500.00
Horses with Hearts, Inc	\$2,500.00
Hospice of the Panhandle	\$4,075.00
Inwood Primary	\$500.00
James Rumsey Technical Institute	\$964.00
Jefferson County 4-H Foundation	
Jefferson County Board of Educati	
Jefferson County	οπ φοσοίου
Community Ministries	\$750.00
Jefferson County Historic	ψ7 50.00
Landmarks Commission	\$4,500.00
Jefferson High School	\$1,000.00
Junior Mentoring Programs	φ1,000.00
(JUMP)	\$9,900.00
Land Trust of the	\$7,700.00
Eastern Panhandle, Inc.	¢100.00
	\$100.00 \$1,000.00
Marine Toys for Tots	
Martinsburg High School	\$950.00
Martinsburg High School Bulldogs	¢40 000 00
Football Boosters	\$10,000.00
Martinsburg North Middle School	\$2,500.00
Martinsburg Police & Fire	4
Explorers Post 27	\$5,000.00
Martinsburg South Middle School	\$3,539.00
Martinsburg Union Rescue Mission	1 \$3,600.00
Martinsburg-Berkeley County	
	\$20,525.00
Martinsburg-Berkeley County	
Public Libraries	\$4,850.00
Mathias Civic Center	\$300.00
Mill Creek Intermediate School	\$320.00
Moorefield High School	\$1,000.00
Moorefield Intermediate School	\$1,000.00
Morgan Arts Council	\$3,000.00
Morgan County Association	
for Food and Farms	\$2,500.00
Morgan County Partnership	\$2,000.00
Morgan County Starting Points	\$5,550.00
Mountain Heart Foundation	\$250.00
Mountain Ridge Intermediate Scho	ool \$192.00
Mountain Ridge Middle School	\$3,500.00
-	



Mt. Zion United Methodist Church	\$3,000.00	
Musselman Middle School	\$260.00	
Nicholas County		
Community Foundation	\$8,644.00	
Norborne Preschool and		
Day Care Center	\$5,000.00	
North Jefferson Elementary School	\$500.00	
Old Charles Town Library	\$600.00	
Opequon Elementary	\$576.00	
Otterbein United Methodist Church	\$100.00	
Partnership for Affordable Housing	\$250.00	
Paw Paw Elementary School	\$200.00	
Pleasant View Elementary School	\$1,000.00	
Potomac Riverkeeper Network	\$1,300.00	
Potomac Valley Audubon Society	\$4,000.00	
Potomack Intermediate School	\$643.00	
Reach Out Rescue and Resources	\$1,000.00	
Relatives As Parents Program of the		
Panhandle, Inc.	\$1,000.00	



\$1,449.00

Romney Elementary School

Romney First United

Romney Middle School	\$1,120.00
Romney Rescue Squad	\$200.00
Rosemont Elementary School	\$1,000.00
Saint Joseph Parish School	\$500.00
Salvation Army	\$3,600.00
Shenandoah Area	
Council-Boy Scouts	\$3,600.00
Shenandoah Women's Center	\$3,600.00
Shepherdstown Day Care, Inc	\$1,400.00
Shepherdstown Elementary School	\$1,340.00
Shepherdstown Middle School	\$2,312.00
Shepherdstown Public Library	\$5,000.00
Slanesville Elementary School	\$465.00
Slanesville Volunteer	
Fire and Rescue Co	\$200.00
South Berkeley Volunteer	
Fire Company	\$1,000.00
South Jefferson Elementary School	\$500.00
Spring Mills High School	\$3,709.00
Spring Mills Middle School	\$2,141.00



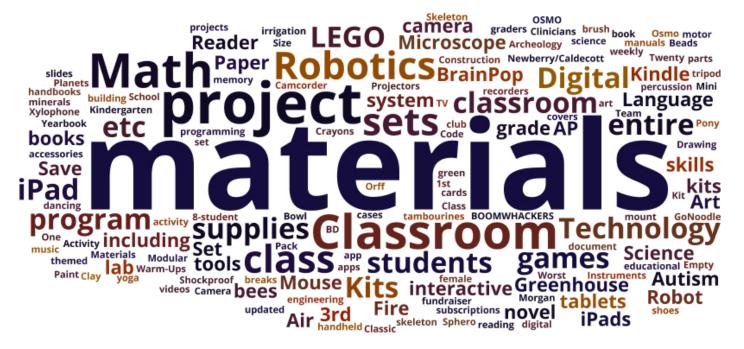
Spring Mills Primary School	\$1,978.00
Springfield Area Rescue Squad	\$200.00
Springfield-Green Spring	
Elementary School	\$250.00
T.A. Lowery Elementary	\$500.00
Tomahawk Intermediate School	\$1,236.00
Town of Wardensville	\$3,850.00
Trinity Episcopal Church	\$3,100.00
United Way of the	
Eastern Panhandle	\$900.00
Valley View Elementary School	\$430.00
Vh1 Save the Music Foundation	\$4,000.00
Wardensville Lions Club	\$1,000.00
Warm Springs Intermediate School	\$1,562.00
Warm Springs Middle School	\$1,500.00
Washington County	
Museum of Fine Arts	\$1,500.00
Washington High School	\$500.00
West Virginia Schools for	
the Deaf & Blind	\$234.00
West Virginia VOAD	\$25,933.00
Widmyer Elementary School	\$487.00
Wildwood Middle School	\$1,280.00
Winchester Avenue	
Elementary School	\$275.00
Wind Dance Farm &	
Earth Education Center	\$850.00



Excellence. Accountability. Impact.™



## **102 MINI-GRANTS TO TEACHERS**











"An investment in knowledge pays the best interest."
-Benjamin Franklin







64 students received a total of \$96,250 in scholarships from the Community Foundation in 2016. Awards ranged from a single \$100 award to "a fifth grade student at Warm Springs Middle School for positive change in behavior" to a number of \$5,000 scholarships from the Floyd and Isabel Jacques Scholarship Fund for top achieving students from Musselman High School.

> Whitney Adams **Natalie Adams** Sophia Bakar Jordan Beer Dana Bishop **Britlee Brock Jade Burton** Miranda Clark **Andrea Compton** Sardana Coyle **Zachary Crooms** Carter Davis Miguel Diaz **Lindsay Dodds** Kiona Dokes Juan Doza **Blair East** Ayana Feliciano Sarah Fizer Sabrina Foxx Caroline Fresch Carlee Gagliardo

Jordan Hardiman Keara Heck Isaac Heironimus Madison Hinkle Violet Hott Dimitri Hunter Madison Isenberg **Emily Ivanescu** Alize Johnson Claire Linton Nicolas Lopez Elizabeth Lynch Paige Mendzela Samantha Mudge Michaela Munson **Gerrit Myers** Travis Nupp Jillian O'Connell Juliana O'Reilly Christiana Otto

Alyssa Paul Maerin Phillips Rachel Piepenbrink Raven Powers Tyler Richards **Zachary Salman** Anna Samandasuk Michaela Sencindiver Kallie Shaffer **Taylor Shrewsbury** Sabrina Shroades Raeshean Simmons Seth Smith **Taylor Stocks** Rachel Stottlemyer Airtica Thomas **Brooke Thomson** Morgan Triggs Jacob Vanorsdale Rebecca Whetzel Morgan Wilkins Tiffany Youngblood

## SCHOLARSHIPS AWARDED



11

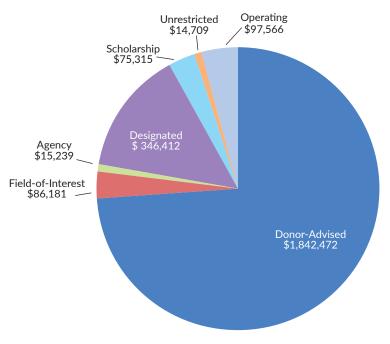
# \$2.5 MILLION IN CONTRIBUTIONS

In 2016, the Community Foundation was fortunate to receive a near-record number of contributions. Some gifts were as small as \$5, while one was actually a check for \$1,000,000. We received contributions from individuals, estates, and nonprofit organizations.

Donors established new funds, contributed to existing ones, made pass-through grants to favorite charities, and supported the West Virginia Neighborhood Investment Program. Others sent gifts in memory of a beloved family member or friend, or in honor of someone's accomplishment.

We received donations of cash, checks, stocks, mutual funds, and more than a few charitable contributions from Traditional IRAs. Working with the Community Foundation, donors are able to split a gift among several funds, thereby supporting a number of favorite charities. By the end of the year, a total of more than \$2.5 million was received.

## Contribution by fund type - 2016



## **6 STEPS TO ESTABLISH A FUND**

Creating a fund in your Community Foundation is economical and easy. Donors receive prudent fund management, generous tax advantages, and access to a committed staff with knowledge of the community and the charities in our area. We handle administrative responsibilities, file necessary tax returns, evaluate charities, and monitor changes in the community to help you achieve your charitable vision. A wide variety of endowed funds can be created with a lump-sum gift of as little as \$5,000. Here are the basic steps for creating a fund.

- 1. Define your charitable and financial objectives.
- Consider how you want your gift to be used and how much you and other family members would like to be involved in making grant recommendations. You may have a favorite charity you want to support, or be passionate about youth and education programs, or want to provide scholarships to area students.
- 2. Select the type of fund that matches your charitable interests. Agency Fund Designated Fund Donor Advised Fund Field of Interest Fund Scholarship Fund Unrestricted Fund
- **3.** Determine which asset you will use in creating your fund. Gifts of cash, securities (publicly traded or closely held), personal property, or real estate can be accepted by the Community Foundation to set up a fund. Assets with a low cost basis are often wise choices, since they offer maximum tax advantages: You pay no capital gains tax and receive a favorable income-tax deduction. You may also wish to review assets inside your retirement plan for possible charitable use.

At all times, we work closely with your accountant and attorney to ensure your charitable wishes are clearly understood and applied.

- **4. Choose a name for your fund.** Many donors choose a family name, but you can use any name that is meaningful to you.
- **5.** Make your gift to the Community Foundation. While your gifts to establish a fund will be commingled with other Community Foundation assets to maximize investment returns, income and appreciation are tracked and tied to your fund, benefitting your fund for its growth and charitable grantmaking.
- **6. Plan a gift through your Will.** We can help provide appropriate language to make sure your Will meets legal and tax criteria.

From here on, your charitable vision is nearly worry-free. The Community Foundation takes care of government filings, grant paperwork, auditing and accounting. Most importantly, you will have joined with hundreds of other local donors who have created a personal legacy that is true philanthropy.

To get started, contact the Eastern West Virginia Community Foundation at (304) 264-0353 or via email at info@EWVCF.org or Hampshire County Community Foundation at (304) 822-7200 or via email at info@HampshireCCF.org, or Hardy County Community Foundation at (304) 538-3431 or via email at info@HardyCCF.org

# 405 GIFTS TO THE COMMUNITY FOUNDATION

Thanks to more than 400 donors (405 to be exact) combined with excellent market returns (8.1% is slightly above our peers), we were able to build our endowment and assets under management to more than \$20 million by the end of 2016. Considering that we were only in our 22nd year, this is truly exceptional growth and we would like to thank all of our donors for making this dream a reality. We are here to serve the Eastern Panhandle counties of Jefferson, Berkeley, Morgan, Hampshire and Hardy. Our small but dedicated staff is happy to help donors establish funds, leave a legacy or support favorite charities. Please feel free to contact us with your questions or comments at any time.

#### Over \$10.000

BB&T Wealth Management **Bowles Rice** Craftworks at Cool Spring Eastern Panhandle CARE Clinic Estate of Virginia Lee Gibbons Patrick and Leigh Fleming Jefferson County 4-H Foundation Larry and Cindy Johnson Macy's D. Scott and Linda Roach Charles and Trudy Seita South Jefferson Ruritan Club United Way of the Eastern Panhandle Bill and Nancy White

#### Up to \$10,000

Dennis D. Barron Paul and Pamela Gavin Virginia Gibbons John League Robert B. Ludwig Bob and Tia McMillan John and JoAnn Overington Ellen Parsons **Ruth Pritchard** Doug Roach Steve and Tina Roach Andrew and Emily Serazin **Robert Tissue** Paul and Lisa Welch Michael and Susan Whalton Henry K. Willard II

#### Up to \$5,000

Berkeley County Historical Society CNB Bank, Inc. Henry Davenport III First United Bank & Trust Paul and Elaine Guttmann Charles and Debra Hockensmith Ormond and Karen Hyers Jefferson Distributing Co. Herb and Betty Kreinik Andrew and Kakie McMillan John W. Newby Northern Eagle, Inc. Don and Deborah Patthoff David T. Seibert Larry and Pam Thornton Darlene Truman **United Bank** David and Teresa Waugerman WGAM, Inc.

## Up to \$2,500

John Allen Bank of Romney **BCT-Bank of Charles Town** Linda Case City National Bank Stanley and Sarah Corwin-Roach Erdem and Joan Ergin Lawrence and Clare Foley C. Leslie Golliday III **HCP Holdings LLC** Chip and Karen Hensell George Karos Floyd and Mike Kursey John P. Lantzv Emily Cooper and James Lee David and Amy Pancake Hazel Parsons Roman's Body Shop Malinda Shaver **Summit Community Bank** Robert and Mary Taylor Valley Health Larry Workman

#### Up to \$1.000

Arnett Carbis Toothman, PLLC Baker Ruritan Club Denny Barron Beckley Area Foundation Ron and Kathy Bennett Bickers Consulting Group, LLC Timothy and Mary Alice Bowers Dannie Wall and

Wavne Braunstein Rod DuChemin and Beth Brent Alan and Ginger Brill

Craig and Taffnie Bronzert Paula Jacobs and Michael Brooks Walter and Mary Jo Brown Martin Burke Carroll D. Butler Capon Valley Bank Catholic Daughters of the Americas Court # 392 David Crosby Ford and Jane Davis Nathan Dehnke Walter and Mary Duke East Hardy High School Elmore Funeral Home **Exhausted Roosters** FirstEnergy Foundation William and Donna Fisher **FNB Bank** Foltz Litter Inc. Friends of Norwalk Foundation Fulton L. Walker, Jr. Scholarship Fund Gateway Garden Club Garry and Hannah Geffert **Grant County Bank** Hawse Shop n Save Morris and Beverly Hosby Mark and Rhonda Hull Jefferson County Historic

Landmarks Commission Kiwanis Club of Shepherdstown Charles and Suzzan Maddy Main Street Martinsburg Richard and Dorothea Malsbary Howard J. Mann Craig Martin Charles E. Mason Judi McIntyre Neil and Susan McLaughlin Sam Mills Harold and Jean Monahan Moorefield Lions Club Patrick and Beverly Murphy Norwalk Antique Car Club Mitch and Pam Orndorff **Robert Owens** Mark and Sue Ann Palmer Joe and Robin Pancake Shirley A. Parsons Pendleton Community Bank Piece Makers Quilt Guild Eric and Cynthia Pierson David Pill Rick and Donna Pill Andrew and April Porterfield Progressive Printing & Graphics Kurt and Mary Jean Pronske Lacy Rice, Jr.

**ROCS Local Market and** Roach Energy Rick and Stacie Rohn Rotary Club of Romney Tom and Ruth Rowan E. Daniel and Virginia Rowzie S.J. Morse Company Sheetz, Inc Terry and Sharon Shipe John and Susan Skinner, Jr. Peter F. Smith Richard D. Stephens

William and Bonnie Stubblefield Joe and Becky Szabo The Hedges Company Thorne & Keplinger, Inc Patrick and Nena Tierney **UCT Martinsburg Council** Richard Wachtel **Walker Properties** Bill and Janis Wertman Steve and Lucy West Dean and Shirlene Young

#### Up to \$250

Dora D. Adams Willard and Donna Aikens Linda Alabaugh Doug and Carol Allemong Jennifer Allen Anonymous Assn for Community **Affiliated Plans** Tom & Patty Austin Baker Insurance Services Cynthia Barber Ann Baronner Anne R. Basham Tim Bereuter and Susanne Bathgate Oscar and Dixie Bean William Bean Todd and Barbara Beckwith Bob and Rayetta Beitzel Betty Veney and Ronald Bell Bendy and Charlotte Bendell Cletus and Patricia Benner Berkeley County Assoc. of Retired School Employees William and Victoria Bonifant Suzanne Boslau Naomi Lee Botic Jerry P. Bowers John and Charlotte Bowman **Ruth Bradley** Gary and Candice Breeden Roy and Iva Breeden Joseph and Susan Brookreson John and Linda Browning Dale A. Buck James and Frances Bullett Thomas and Nancy Burke Bruce and Susan Butler Gregory and Jennifer Butler C & A Estate Caperton Furniture Works **Ethel Carter** Juantia Carter Michael Carvl Wendell and Janice Christopher City of Romney Dick and Gail Clarke Larry and Donna Clifton Jane Clipp **Betsy Coffey** Kenneth Collinson Colvin For Judge 2016 Committee to Elect Bridget Cohee Committee to Elect Hassan Rasheed Thomas and Chad Conant



William and Ann Cook

Ellen Cooke Allen and Elaine Corfman County United Way Philip and Frances Cox Sylvia Crawford Terry and Mara Crisp Jeannie Cross **Peggy Cross** Jacqueline Dailey James and Diane Dailey Paul Daugherty David and Sandra Dettner Thomas Dickerson Harlan and Elizabeth Diggs Roxanne Donaldson Sean and Emily Duggan Eastern Building Supply Echo Falls C.E.O.S. Sherry Fultz Noren Elliott Cathy Elza Mr. and Mrs. Paul Embrey Dale Everhart Joseph and Marcia Fisher Charles and Linda Foreman Billie Frame Joe and Mari Freno Doug and Pearl Frye David and Betty Jean Fulk Shawn and Felicia Fuller Gary and Pam Gearhart Giffin Funeral Home Girl Scouts Council of the Nations Capital Golden Rule Chapter No. 69 O.E.S. Robert Goldschmidt Dixie Good Claudette Graham Grant County Mulch, Inc. Norma Grant Steve and Nora Sue Green Bill and Julie Gregg Barbara Gregory Mannie and Doris Griffith Edward Grimes, Jr. **Edward Grossman** Alton and Katherine Grove Shirley Grove Jacob and Carol Gruver Hardy County Convention & Visitors Bureau Hardy Telecommunications Harris Community Care, Inc. John M. Hawk Rov and Carol Hawkens Lisa Hendrick Casandra Henry D. Frank and Ann Hill Wayne and Ruth Hill David and Elise Hopkins Robert and Joyce Horn Hornby Publishing Jerry and Susanne Horner John and Barb Howell Mitch and Shirley Jacques Chris and Sherri Janelle Paula Janes Gary and Sondra Jarrell Juante Gebape Inc. Mr. and Ms. John Kafton

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Jan and Rick Wilkins Yvonne Williams Woman's Club Harpers Ferry District WV Oil Marketers & Grocers Assn., Inc. Patty Wygal Xi Gamma Zeta William and Jane Yearout Walter Brown Yvonne Williams

"Earn as much as you can, save as much as you can, invest as much as you can, give as much as you can."

## - John Wesley

Mr. and Mrs. David Marchette Martin Luther King Scholarship Committee Jennifer Martin Martinsburg High School Class of 1949 Mathias Ruritan Club Elaine Mauck Judith Mawhinney Merrill and Tammy May Warren McCrory Matthew McKinney Juliia McMillan-Jones Sheila Melzac Patricia Merchant Vincent and Jo Mileo C. David and Barbara Miller James W. Miller Kurt Miller Matthew and Carolyn Miller Thomas W. Miller William J. and Vickie Jo Milleson Raymond T. Moreland, Jr. Mountaineer Veterinarians Milly Mullins Roger and Jean Murphy Brenda Murray **Bree Myers** Heather Dern Myers John and Rhonda Myers Kenneth and Pamela Neely

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Dan Smith



## Gifts were made in memory of:

Arch Gleason **Arthur Shipe** Barbara Pancake Dave Hamill David "Hawk" Hawkens Desiree' Shields Don Roach **Dorothy Vining** Eleanor Ann Shirley Erin Michele Pancake Hank Sweeney Helen McCarty Arvin James Hockenberry Joan Roach Katherine Avey Markoulis Kenneth Shipley Kim Caton Williams Laura Beth Horner Shantz Nancy Hockensmith **Phil Seibert** R. L. Johnson, Jr. Richard Lawrence Bell Robert B. Seem, Sr. Robert Craig "Bobby" Lewis Sarah Duff Steptoe Stefani Pierson Tom Seely Valerie Wilbur Virginia Lee Gibbons Wendell Seibert

## Gifts were made in honor of:

Alan Brill Ann Pancake Ashlev Pill Bill & Nancy White's Daughters Bob and Tia McMillan **Brian Hott** Catherine Pancake Charles Maddy **Charlie Parsons** Charlotte Ann Macdonald Dave Pill George Karos Jimmy Pancake Katie Pill Laura Pancake **Lucy Grimes** Michael and Susan Whalton Mike Pancake Nancy Valtin's 90th Birthday Pill Family Rick and Donna Pill **Ruby Amores** Ruth Rowan Sam Pancake

Thelma Pill



Four of our Past Presidents – Stew Borger, Tia McMillan, Doug Roach, and Diane Dailey joined together to celebrate the 20th anniversary of the Community Foundation in 2015. We are most grateful to these four outstanding individuals for their leadership, guidance, and unselfish contribution of time, talent, and treasure.

## 44 EMERITUS LEADERS

Special thanks to the members of our Emeritus Leadership Council; men and women who previously served on the board or as technical advisors of the Community Foundation.

Tia McMillan Jeff Boehm Walter Brown **Diane Dailey Betsy Coffey Heather Hovermale** Taylor Perry Diane Melby Doug Roach **Betty Russell Stew Borger RB** Seem Glen Stotler Robert Strauch Henry Kayes Keith Berkeley **Gary Fleming Gat Caperton** Mary Clare Eros Jack Huyett Roger Perry Phil Keesecker

Joanna Abbruzzese Jeff Arndt Neil McLaughlin Otho Lewis Lacv Rice Jr. John Skinner **Terry Hess** Louise Spring Joan Ergin Rob Hoxton, IV Dr. Jim Keel **James Nichols Svlvia Sanders Larry Thornton** Phil Cox George Alwin Rod Frye Terry Walker John Beatty Stephen Grove **Robert Hersey** B. Lee Snyder



## DOES THE COMMUNITY **FOUNDATION WORK**



## IT STARTS WITH DONORS







**CORPORATIONS** 



PRIVATE FOUNDATIONS



NONPROFIT ORGANIZATIONS

# **PASSION**



**ARTS** 



**EDUCATION** 



**ENVIRONMENT** 



COMMUNITY WELLNESS



**FAITH** 

## **WHO USE THEIR GIFTS**







CASH **SECURITIES REAL ASSETS RETIREMENT FUNDS INSURANCE BEQUESTS** 

## CREATE **ENDOWED FUNDS**



**ALL ENDOWED FUNDS:** 

**UNRESTRICTED DONOR ADVISED DONOR DESIGNATED AGENCY SCHOLARSHIP FIELD OF INTEREST** 

**ARE GOVERNED BY** AN AGREEMENT BETWEEN **COMMUNITY FOUNDATION** AND THE DONOR

## **DISTRIBUTIONS**

FROM THE ENDOWMENTS FULFILL THEIR **CHARITABLE PASSIONS THROUGH** 



SCHOLARSHIPS FOR STUDENTS



GRANTS TO CHARITABLE ORGANIZATIONS

# THE COMMUNITY FOUNDATION

**Hampshire County Community Foundation** PO Box 40 Romney, WV 26757 304-822-7200

MEETS WITH DONORS TO DETERMINE WHICH TYPE OF FUND IS RIGHT FOR THEIR GOALS

ASSISTS DONORS WITH GIVING COMPLEX GIFTS

**HELPS DONORS GROW FUNDS** 

**PROVIDES ANNUAL STATEMENTS** ON FUND ACTIVITY

OFFERS EXPERTISE ON COMMUNITY NEEDS

PRESERVES DONOR WISHES IN PERPETUITY

**Eastern West Virginia Community Foundation** 

229 E. Martin Street, Suite 4 Martinsburg, WV 25401 304-264-0353 www.ewvcf.org

**Hardy County Community Foundation** PO Box 1058 Moorefield, WV 26836 304-538-3431 www.hardycountycf.org

www.hampshireccf.org