

23RD ANNUAL REPORT TO THE COMMUNITY

INTERCONNECTEDNESS



**EASTERN WEST VIRGINIA
COMMUNITY FOUNDATION**

Gather. Grow. Grant.



Greetings!

The Wardensville Garden Market sent Amy Pancake, our Hardy County Community Foundation affiliate director, several photos of their grant funded STREAM (Science, Technology, Reading, Engineering, Art, and Math) CAMP on the very day we began thinking about this year's Annual Report cover. The photograph of the campers enjoying a teambuilding exercise was exactly what we were looking for and it fit perfectly with our theme of INTERCONNECTEDNESS. As a Community Foundation, we are here to strengthen and enhance the relationships between our donors and vital charitable causes, and we are here to provide our nonprofit partners with financial resources and community leadership.

From grantmaking to asset growth, 2017 was an outstanding year for the Eastern West Virginia Community Foundation. Thanks to the generosity of our donors, we awarded more than \$1.76 million in grants and scholarships. Our investments enjoyed an annual rate of return of 15% and we held more than \$23 million in assets at the end of 2017. One million dollars in donations helped build our assets and provided us with expanded grantmaking capabilities.

The addition of our Program Manager in July gave the staff more time to focus on core responsibilities, and revisions to our grant and scholarship programs are beginning to pay dividends. We added several new field of interest funds that allow us to award grants to more nonprofit organizations and provide greater services to the community; and we've had great feedback about the new application forms and grant deadline.

Many thanks to Darlene Truman who served as President of the Community Foundation the past two years. Darlene's professionalism, keen intelligence, and quick wit provided a calm reassurance to the staff and board. For her leadership and friendship, we are most grateful.

We are looking forward to more success in the years to come and are excited to be working together for the betterment of Jefferson, Berkeley, Morgan, Hampshire and Hardy counties, as well as for all of West Virginia. This promises to be another wonderful year and we are thankful to have the opportunity to serve our donors, area nonprofit organizations, and the community at large.

Regards,

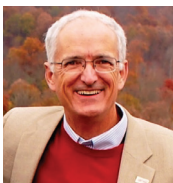
Lisa Welch

President



Michael Whalton

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

EASTERN WEST VIRGINIA COMMUNITY FOUNDATION

Gather. Grow. Grant.



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

EWVCF Board of Directors

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For Good. Forever.

P.O. Box 40
Romney, WV 26757
304.822.7200

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Milly Mullins
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Connecting Caring People with Community Causes.

P.O. Box 1058
Moorefield, WV 26836
304.538.3431

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Michael McDonald
Robert Taylor
Tim Thorne
Angie Zirk

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\$1.76 MILLION IN GRANTS & SCHOLARSHIPS

4 & 5

301 GRANTS AWARDED

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82 SCHOLARSHIPS AWARDED

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20

HOW IT WORKS

\$1,765,647 AWARDED IN GRANTS & SCHOLARSHIPS

Grantmaking is a perfect example of the interconnectedness the Community Foundation enjoys with a wide variety of local, regional, and national charities. We awarded a total of 301 grants and 82 scholarships last year; supporting everything from the American Cancer Society's local Relay for Life program in Berkeley County to Zion Episcopal Church's historic cemetery in Charles Town.

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 organizations received one or more EWWCF grants totaling the amounts listed.

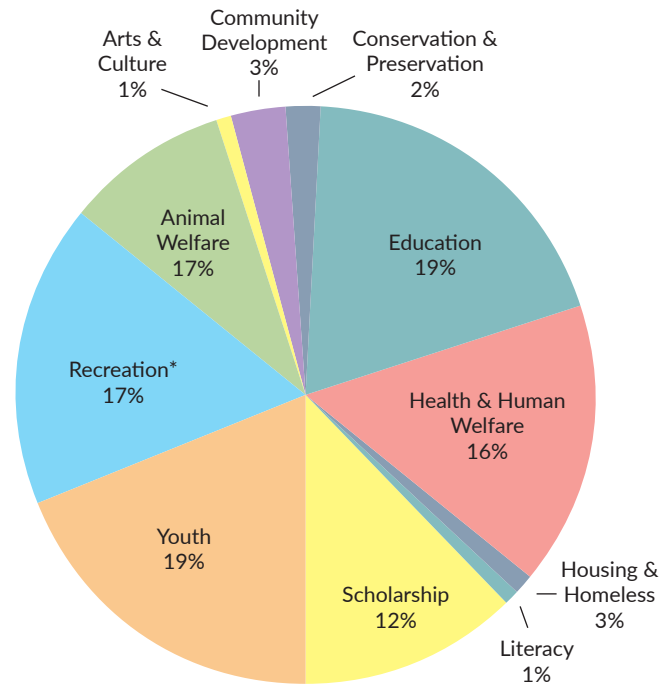
American Cancer Society	\$1,000.00
Animal Welfare Society of Jefferson Co	\$14,000.00
Augusta Elementary School.....	\$1,050.00
Augusta Volunteer Rescue Squad	\$700.00
BE-Hive, A Family Inspiration Place, Inc.	\$5,000.00
Berkeley County Backpack Program, Inc.	\$18,000.00
Berkeley County Humane Society	\$3,500.00
Berkeley County Meals on Wheels.	\$23,000.00
Berkeley County Schools.....	\$86,940.00
Berkeley County Special Olympics.....	\$700.00
Berkeley Heights Elementary	\$500.00
Berkeley Senior Services	\$2,800.00
Birthright of Charles Town	\$250.00
Black Cat Music Cooperative (BCMC)	\$2,300.00
Blue Ridge Community & Technical College	\$13,384.00
Boys & Girls Club of the Eastern Panhandle	\$17,000.00
Bros and Bras	\$250.00
C.W. Shipley Elementary	\$1,235.00
Camp Frame 4-H Association	\$24,000.00
Capon Bridge Elementary	\$1,698.00
Capon Bridge Middle School.....	\$250.00
Capon Bridge United Methodist Church	\$150.00
CASA of the Eastern Panhandle, Inc..	\$3,000.00
CCAP/Loaves & Fishes	\$7,500.00
Children's Home Society of West Virginia.....	\$3,500.00
City of Charles Town	\$4,000.00

City of Romney	\$150.00
Community Alternatives to Violence, Inc.	\$1,000.00
Community Combined Ministries/Kidz Power Pacs.....	\$4,000.00
Community Networks, Inc.	\$8,900.00
Contemporary American Theatre Festival.....	\$2,000.00
Days End Farm Horse Rescue, Inc.....	\$500.00
Driswood Elementary School.....	\$1,800.00
Eagle Gridiron Gang Supporters	\$10,790.00
Eagle School Intermediate	\$1,200.00
East Hardy Early Middle School.....	\$20,000.00
East Hardy High School.....	\$20,500.00
Eastern Panhandle Young Life.....	\$2,500.00

301 Grants Awarded in 2017

Eastern Regional Family Resource Network	\$150.00
Eastern WV Community Action.....	\$400.00
Elmwood Cemetery Association.....	\$4,000.00
Faith Christian Academy.....	\$2,000.00
Faith Community Coalition for the Homeless, Inc.....	\$5,000.00
Farms Work Wonders	\$1,500.00
For Love of Children's Outdoor Education Center	\$1,500.00
Fort Edwards Foundation.....	\$200.00

2017 GRANTS BY PROGRAM



*Pie chart does not include the extraordinary \$1 million grant for the W. Randy Smith Recreation Center.

Friends Fur Life Rescue of WV.....	\$500.00
Generosity Feeds Martinsburg.....	\$3,000.00
Girl Scouts Council of the Nation's Capital	\$3,750.00
Good Samaritan Free Clinic	\$15,000.00
Good Shepherd Interfaith Vol Caregivers	\$3,200.00
Grace Episcopal Church.....	\$4,000.00
Habitat for Humanity Eastern Panhandle	\$350.00
Hampshire High School	\$250.00
Hardy County Committee on Aging INC	\$2,350.00
Harpers Ferry Middle School	\$1,442.00
Hedgesville Elementary	\$181.00
Hedgesville High School.....	\$1,862.00
Hedgesville Hounds.....	\$500.00
Hedgesville Middle School.....	\$893.00
Historic Shepherdstown Commission	\$1,000.00
Horses with Hearts, Inc.	\$4,000.00
Hospice of the Panhandle	\$4,775.00
James Rumsey Technical Institute... ..	\$12,000.00
Jefferson County 4-H Foundation	\$8,000.00
Jefferson County Board of Education	\$1,000.00
Jefferson County Community Ministries	\$850.00
Jefferson County Health Department	\$1,949.00

\$8.8 MILLION TOTAL AWARDED TO DATE

Since its inception in 1995 the Community Foundation has awarded a total of more than \$8.8 million in grants and scholarships.

Jefferson County Historic

Landmarks Commission	\$2,500.00
Jefferson High School	\$2,245.00
John J. Cornwell Elementary School.....	\$681.00
Junior Mentoring Programs (JUMP) ..	\$9,550.00
Lost River Educational Foundation	\$500.00
Martinsburg High School	\$7,483.00
Martinsburg High School Baseball Boosters	\$12,000.00
Martinsburg North Middle School	\$810.00
Martinsburg South Middle School	\$855.00
Martinsburg Union Rescue Mission...	\$3,750.00
Martinsburg-Berkeley County	
Parks & Recreation	\$1,057,601.00
Martinsburg-Berkeley County Public Libraries	\$5,750.00
Moorefield Active Caring	\$500.00
Moorefield Elementary	\$1,000.00
Morgan Arts Council	\$5,000.00
Morgan County 4-H	\$2,000.00
Morgan County Partnership	\$2,000.00
Morgan County Sheriff's Office	\$1,125.00
Morgan County Starting Points	\$5,984.00
Mountain Heart Foundation.....	\$250.00
Mountain Ridge Intermediate School	\$5,000.00
Mountain Ridge Middle School.....	\$1,697.00
Mt. Zion United Methodist Church - Augusta	\$500.00
Mt. Zion United Methodist Church - Martinsburg	\$3,000.00
Museum of The Berkeley Springs.....	\$500.00
Musselman High School	\$2,518.00
Musselman Middle School.....	\$1,000.00



Norborne Preschool and Day Care Center

Old Charles Town Library	\$600.00
Orchard View Intermediate School.....	\$417.00
Panhandle Home Health Care.....	\$22,500.00
Paw Paw Elementary	\$1,420.00
Pikeside Learning Center.....	\$677.00
Pleasant View Elementary.....	\$493.00
Police Unity Tour, Inc. - Chapter IV	\$1,000.00
Potomac Center.....	\$500.00
Potomac Valley Audubon Society.....	\$1,500.00
Potomack Intermediate School.....	\$329.00
Ranson Old Town Community Gardens	\$1,000.00



Reach Out Rescue and Resources.....	\$1,000.00
Romney Elementary	\$2,151.00
Romney Middle School	\$750.00
Romney Parks & Recreation	\$200.00
Rosemont Elementary.....	\$1,541.00
Saint Joseph Parish School	\$500.00
Salvation Army.....	\$3,750.00
Shenandoah Area Council-Boy Scouts	\$4,750.00
Shenandoah Valley Chapter, NSDAR	\$1,400.00
Shenandoah Women's Center.....	\$3,750.00
Shepherd University.....	\$8,500.00
Shepherd University Foundation.....	\$5,200.00
Shepherdstown Elementary School.....	\$579.00
Shepherdstown Middle School.....	\$3,307.00
Shepherdstown Public Library	\$6,232.00
Slanesville Elementary	\$973.00
Slanesville Presbyterian Church	\$500.00
South Berkeley Volunteer Fire Company	\$19,703.00



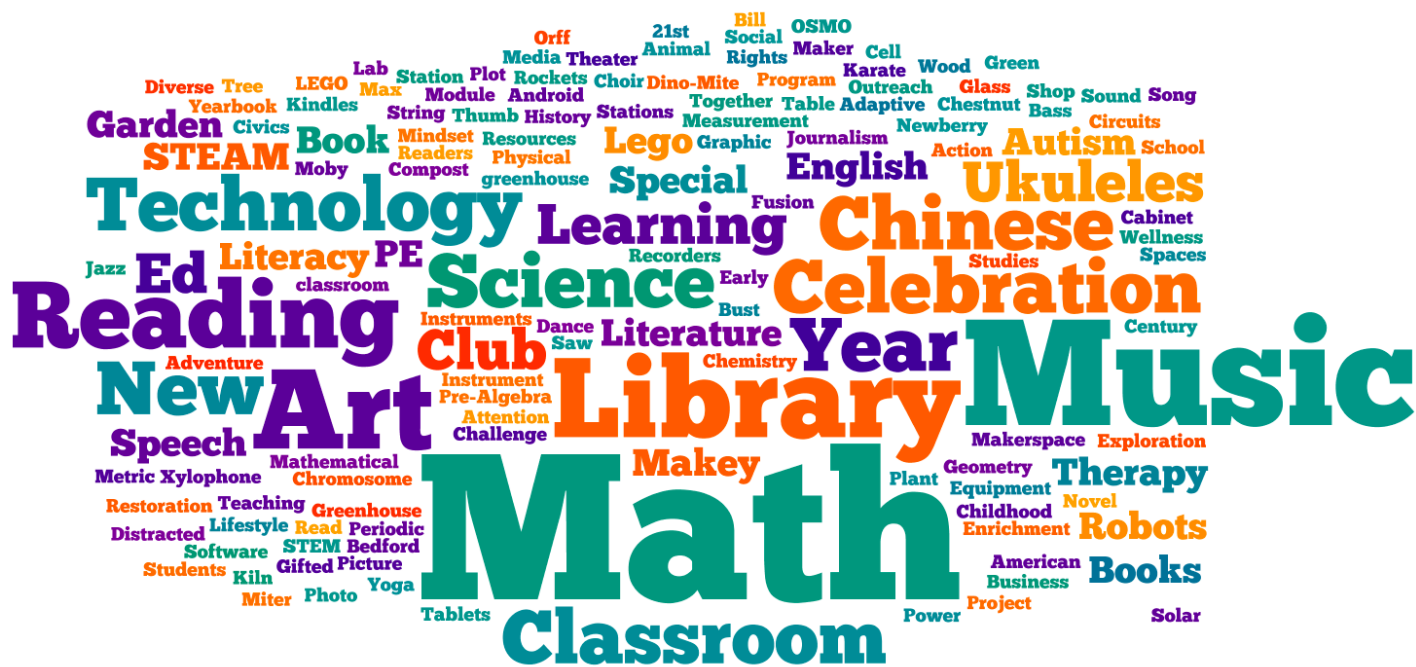
South Jefferson Elementary.....	\$1,450.00
Spring Mills High School.....	\$5,625.00
Spring Mills Middle School	\$1,144.00
Spring Mills Primary School	\$1,115.00
Springfield Area Rescue Squad	\$700.00
Springfield-Green Spring Elementary... ..	\$500.00
T.A. Lowery Elementary.....	\$500.00
Tomahawk Intermediate School	\$500.00
Town of Wardensville.....	\$4,250.00
Toys for Tots of the Eastern Panhandle	\$1,000.00
Trinity Episcopal Church.....	\$3,450.00
Tuscarora Elementary School	\$250.00
Valley View Elementary	\$201.00
Vh1 Save the Music Foundation	\$2,350.00
Wardensville Lions Club	\$1,000.00
Warm Springs Intermediate.....	\$7,501.00
Warm Springs Middle.....	\$876.00
Warm Springs Watershed Association.	\$500.00
Washington County Museum of Fine Arts	\$2,500.00
Washington High School.....	\$930.00
Washington Street Artist's Co-Op	\$250.00
West Virginia Schools for the Deaf and the Blind.....	\$750.00
West Virginia VOAD.....	\$500.00
Widmyer Elementary School.....	\$1,574.00
Wildwood Middle School.....	\$500.00
Winchester Avenue Elementary	\$891.00
Wind Dance Farm & Earth Education Center	\$1,000.00
WVU Foundation.....	\$1,000.00
WVU Foundation/Eastern Panhandle HSTA	\$534.00
Zion Episcopal Church	\$1,000.00



Excellence. Accountability. Impact.™

125 MINI-GRANTS TO TEACHERS

Small grants of up to \$500 each are awarded annually to teachers from Jefferson, Berkeley, and Morgan counties and up to \$250 each in Hampshire County. Last year, during late November receptions, just over \$44,000 was awarded to 125 teachers for everything from adaptive PE equipment to ukuleles and xylophones. Our Mini Grants to Teachers program is another great example of how we connect our donors to the causes that mean the most to them. The Wordle below was created using key words describing each grant and gives you an idea of the variety of the programs and projects that were funded.



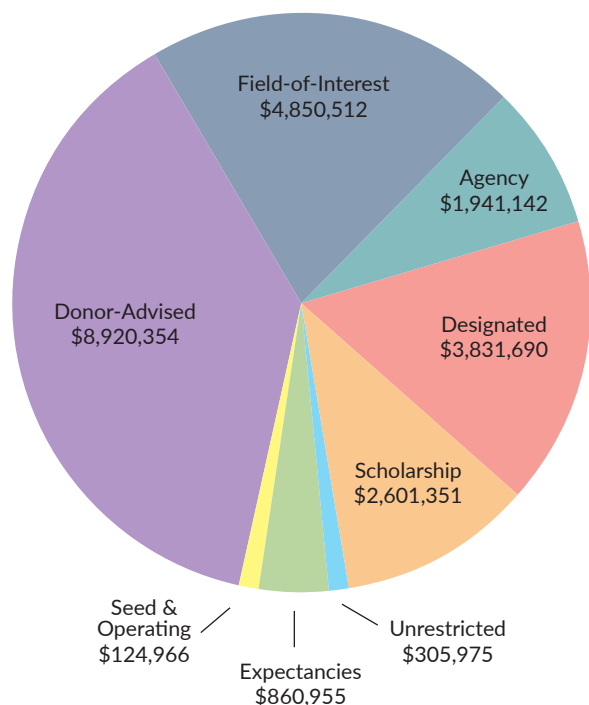
"An investment in knowledge pays the best interest."

-Benjamin Franklin



\$23.4 MILLION ASSETS BY FUND TYPE

ASSETS BY FUND TYPE - 2017



Community Foundations help donors support favorite charitable causes and nonprofit organizations by creating permanent endowments that will last forever. Whereas most other charities have a narrow focus, community foundations can connect a donor to whatever your passion or passions may be. For some, it is an alma mater, a local theatre or arts organization, daycare or recreation center, historical society or human welfare, education or recreation, youth or senior citizen program. For others, it might be natural resources conservation, a 4H club, a scholarship or an animal rescue organization. With a gift to the Community Foundation, your generosity and support of favorite causes will 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 2017, with assets of just over \$23.4 million, we awarded \$1.76 million in grants and scholarships.

To support the operations of the Community Foundation, each endowed fund is charged 1% annually (new scholarship funds are assessed a 2% annual fee because of the complexity of scholarships). These fees cover approximately 70% of our annual expenses. Additional operating income is derived from our Partners in Philanthropy program along with contributions from several generous individuals.

2017 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, 2017. You are welcome to download our 2017 audited financial statements and IRS Form 990 from our Website at www.EWVCF.org



Scan this QR Code to download our 2017 IRS Form 990



Scan this QR Code to download our 2017 Financial Report/Audit

15% INVESTMENT RETURN IN 2017

The Community Foundation enjoyed 15% return on investments in 2017. Assets held by the Eastern West Virginia Community Foundation for five years earned a 8.1% 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**

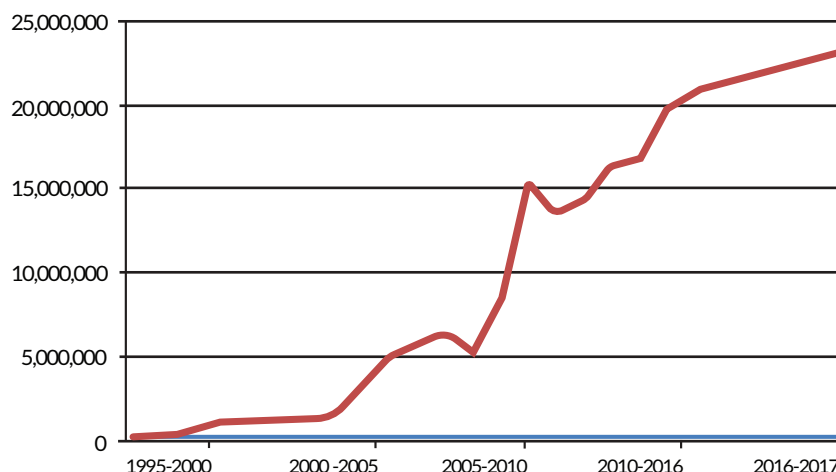
Keith Unger and James "Rusty" Hudnall of **City National Bank**

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.**

ASSET GROWTH



Sixty-nine students, with at least one hailing from every public high school in the Eastern Panhandle, received a total of \$102,150 in scholarships from the Community Foundation in 2017. Since our inception, we have awarded nearly 630 scholarships, totaling over \$697,000. This year, our average scholarship was \$1,300 and although most students receiving EWVCF awards are attending colleges and universities across West Virginia, a few are in some of the top educational institutions in New York, Pennsylvania, Maryland and other states. We are proud of the students and grateful to the donors who make the scholarship program possible.

Joseph Affolder
Rachael Avey
Trevor Barrett
Allyson Barry
Dana Bishop
Renee Bittinger
Colton Blackwell
Chloe Campbell
Peyton Carter
David Carvajal
Makenna Casto
Ryan Christopher
Ciera Clawson
Sierra Dixon
Lindsay Dodds
Olivia Dominiski
Dylan Doyle
Aneyla Dozier
Israel Ellis
Marlene Ferguson
Ashley Fink
Caitlin Fitzwater
Sarah Fizer

Holly Fogel
Sabrina Foxx
Parker Grace
Jessica Hamersla
Mikai Hammer
Shade' Harmison
Ashley Hess
Violet Hott
Emma Hull
SeVohn Hunter
Nazene Hunter
Dara Insixiengmay
Jonai Jackson
Sophia Keisling
Grace Kubic
Bryanna Kubovicik
Addison Lackey
Blair Lewis
Claire Linton
Megan Lloyd
Yadara Luckett
Cassidy Lutman
Nicholas Miller

Sierra Marie Miller
Jon Moody
Jillian O'Connell
Jessica Parker
William Patterson
Isabella Payne
Fabian Perrett
Maerin Phillips
Raven Powers
Amber Ragar
Patrick Rao
Isabella Reichel
Brady Reiff
Tyler Robinson
Jordan Robinson
Zachary Salman
Ann Stickley
Morgan Triggs
Alexandra Valone
Virginia Vider
Jamara Washington
Courtney White
Olivia Yates

SCHOLARSHIPS AWARDED



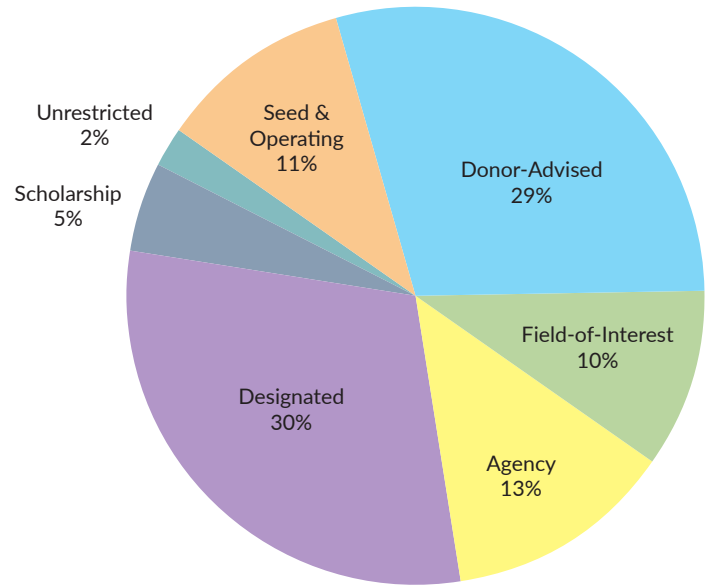
\$1 MILLION IN CONTRIBUTIONS

In 2017, the Community Foundation was fortunate to receive more than 300 contributions; donations that came from individuals, estates, and nonprofit organizations. By the end of the year, the gifts totaled just over \$1 million.

A number of donors established new funds, contributed to existing ones, made pass-through grants to favorite charities, or 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. Funds established in 2017 included the Joshua Barnes Charitable Fund, the Snyder Family Charitable Fund, the Hensell-Heffle Berkeley County Youth Fund, and the OK Hampshire County Warm the Children Fund.

We received donations of cash, checks, stocks, mutual funds, and more than a few charitable rollover gifts from Traditional IRAs; which is a great way for donors 70 ½ or older to support favorite charities by using a portion of the mandatory distribution from a Traditional IRA. Working with the Community Foundation, donors are able to split a large gift among several funds, thereby supporting a number of favorite charities.

Contribution by fund type - 2017



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.

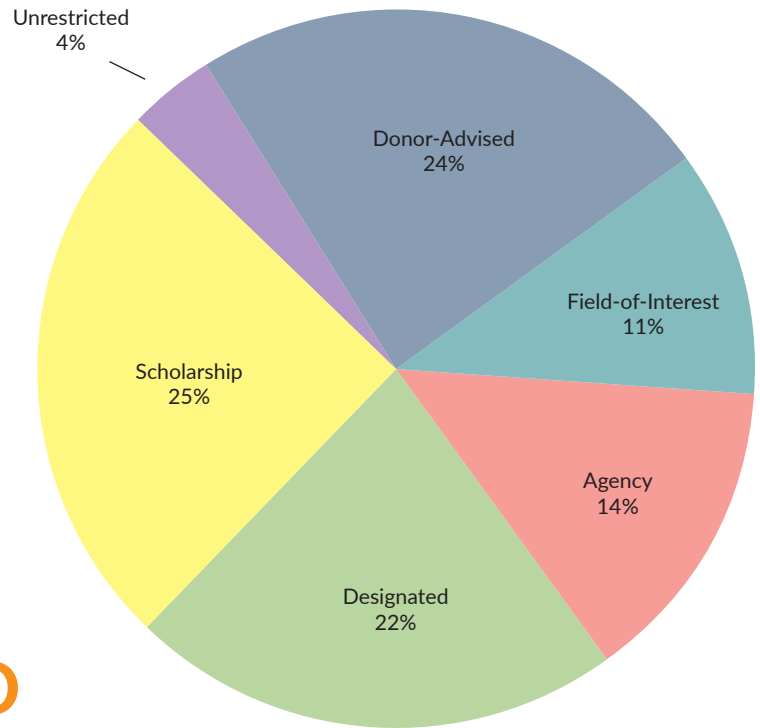
From here on, your charitable vision is nearly worry-free. The Community Foundation takes care of government filings, grant paperwork, auditing and accounting. Most importantly, you will have joined with hundreds of other local donors who have created a personal legacy that is true philanthropy.

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

225 COMPONENT FUNDS

The Eastern West Virginia Community Foundation (EWVCF) has grown exponentially during the past several years and now holds 225 component funds with more than \$23.4 million in assets. Donors established these funds to serve their communities in a wide variety of ways, from agency endowments to unrestricted Community Impact Funds. In-depth descriptions of all 225 EWVCF funds can be found on our web site.

We have 57 Scholarship Funds, 53 Donor Advised Funds, 50 Designated Funds, 31 Agency Funds, 26 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.



5 COUNTIES SERVED

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.

The Eastern West Virginia Community Foundation Board of Directors oversees all operations, and the two affiliates are semi-autonomous with advisory boards for each. Our Affiliate Director Amy Pancake lives in Hampshire

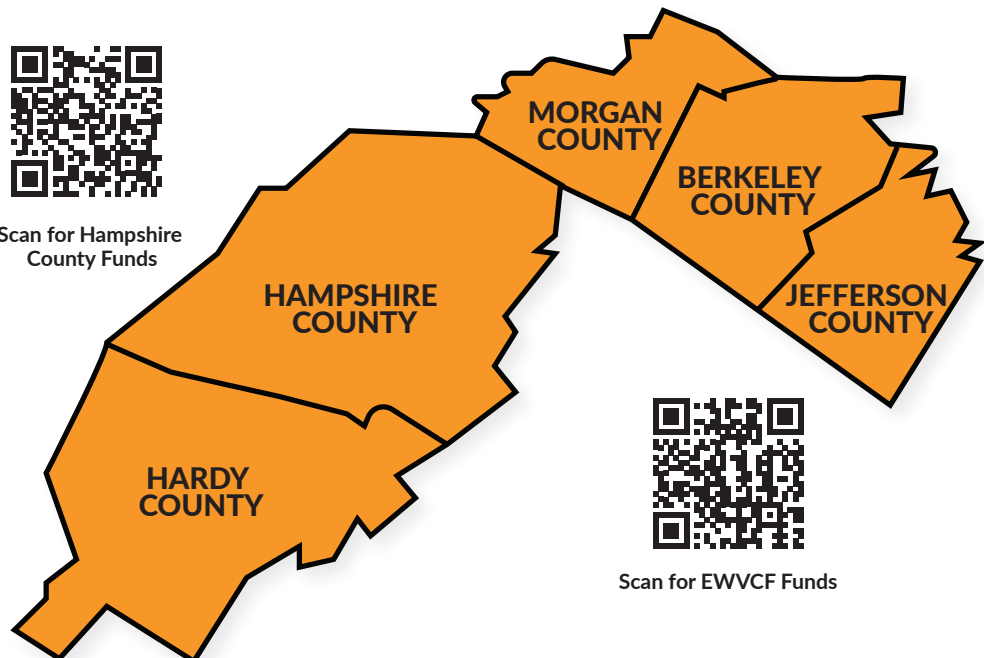
County and has done a splendid job in our western region, working with both the advisory boards and EWVCF staff to ensure that we stay connected and offer a high level of professionalism to the people and organizations that we serve. Information and descriptions about all of the component funds and the wide variety of programs we support 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.



Scan for Hampshire
County Funds



Scan for Hardy
County Funds



Scan for EWVCF Funds

31 AGENCY FUNDS

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.

Berkeley County Historical Society
Legacy Fund
Blue Ridge CTC Foundation Endowment Fund
Camp Frame 4-H Fund
CCAP/Loaves & Fishes Endowment Fund
Community Networks, Inc. Endowment Fund
For the Kids, By George! Children's Museum
Endowment Fund
Friends of Senior Life Services of
Morgan County Endowment Fund
Healthy Smiles Dental Health Fund
Hospice of the Panhandle Fund
Jefferson County 4-H Foundation Fund
Junior Mentoring Programs (JUMP) Fund
Martinsburg-Berkeley County Parks &
Recreation Board Endowment Fund
Martinsburg-Berkeley County
War Memorial Park Fund
Mountain Heart Foundation Fund
Norborne Preschool/Sarah Steptoe
Charitable Fund
Old Opera House Theatre Endowment Fund



Our History Our Community Fund
Panhandle Home Health Fund
Potomac Valley Audubon Society Fund
Red Funkhouser Town Park Fund
Robert L. Hawvermale, Sr. Saint Mark's
Episcopal Church Camp Fund
Rotary Club of Romney, WV
Endowment Fund
Shepherdstown Day Care Endowment Fund
Shepherdstown Presbyterian Church Fund
Trinity Lutheran Church Needmore
Cemetery Fund
United Way Community Safety Net
Endowment Fund
United Way Independent Seniors
Endowment Fund
United Way of the Eastern Panhandle Fund
United Way Strong Families
Endowment Fund
United Way Thriving Children
Endowment Fund
WV-20021 AFJROTC Angels Fund

50 DESIGNATED FUNDS

Establishing a Designated Fund allows you to support the good work of a specific nonprofit — a senior center, museum, church, day care center, 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.

Administrative Endowment Fund
Ambrose Park Children's Garden Fund
Animal Welfare Society of Jefferson County Fund
Arthur H. Miller Fund
Baker Park Endowment Fund
Berkeley Arts Council Endowment Fund
Betty L. Severson Good Shepherd Interfaith Volunteer
Caregivers Fund
Boys and Girls Club of Morgan County-Gail A. Shade Fund
Boys and Girls Club of the Eastern Panhandle
CASA of the Eastern Panhandle Fund
Charles Town Rotary J.B. Smith Memorial Fund
Cool Spring Preserve Fund
Dan VanBelleghem Fund
Deanna Wilson and J Cavanagh STEM Fund
Dyer, Vance, and Harmon Wardensville Recreation Fund
Eastern Panhandle Young Life Fund
Eastern WV Community & Technical College
Entrepreneurial & Economic Development Fund
Endowment for Special Needs

Ernie Schrider and Friends Fund
First Presbyterian Church Angel Fund
Floyd and Mike Kursey Fund
George W. and Holly Woods Hancock Memorial-
Mt. Zion United Methodist Church Fund
Ginnie Molnar Fund for Special Athletes
Goldie Gibbons Park Fund
Habitat for Humanity Fund
Hampshire County Energy Express Fund
Helen Wolford Humane Society Fund
Hoy Shingleton Sr. Youth Fund
James E. Keel Jefferson County Community
Ministries Endowment Fund
Jefferson County Public Schools Fund
John and Shobie Fisher Fund (seed)
John L. Burkett, III Memorial Fund
John S. Wharton Family Fund
Katherine Burr Jackson Fund for the Peter Burr Farm
Larry Lower Morgan County Food & Farms Fund
Marcella Foltz and Don Biller Fund

50 DESIGNATED FUNDS (Continued)

Margaret Allen Fund
Martinsburg Union Rescue Mission Endowment Fund
honoring Bill and Libby Crowe
Myrtle Schneiderhan Fund
OK Hampshire County Warm the Children Fund
Pat & Bev Murphy Boys & Girls Club Arts Fund
Patient Care for Hospice Fund
Reliving History Fund
Ron Nordeen/Good Shepherd Interfaith
Volunteer Caregivers Fund
Rosabell and James Roman Fund
Shenandoah Women's Center Fund
Slanesville Presbyterian Angel Fund
Steven M. and Tina F. Roach Camp and Mission Fund
The George Washington Chair of Living Ethics
at Shepherd University
Trinity Episcopal Church Angel Fund



53 DONOR ADVISED FUNDS

A Donor Advised Fund allows you to make a gift to the Community Foundation and remain actively involved. 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.

Arnie and Becky Stotler Family Fund
Austin Family Fund
Baker Family Fund
Berkeley County Industrial Park Development Fund
Berkeley County Reads Fund
Bill & Nancy White Charitable Fund
Boehm Family Fund
Borger Family Fund
City National Bank Charitable Fund
DeJarnett Family Fund
Desiree' Shields Fund
Diane M. and James W. Dailey II Fund



E.D. Fund
El Dorado Fund
Erin Michele Pancake Memorial Fund
Fleming Family Fund
Gabe's Gifts Memorial Fund (seed)
Geri Wissinger Fund
Glenna Merica Grove Fund
Hardy County Founding Fund
Hensell-Heffle Berkeley County Youth Fund
Heritage Fund
Home Hill Charitable Fund
Janelle Family Fund (seed)
Joan Roach Volunteer Fund for the Needy
Joshua Barnes Charitable Fund (seed)
June Zimmerman Health and Fitness Fund
Kreinik Family Fund
Linda Case and John Rayburn Family Fund
Martin Luther King Scholarship Fund
McMillan Family Fund
Morgan County Youth Fund
Owen Family Fund
Palmer Family Fund
Paul and Lisa Welch Fund
Restorative Justice Fund
Robert W. and Gina M. Miller Fund
Roger and Wanda Perry Fund
Scott and Linda Roach Fund
Shenandoah Community
Health Endowment Fund

Social Change Fund
 Solomon Fine Fund
 SPARC Foundation Fund
 Stefani A. Pierson Fund for Charitable Giving
 Stephen G. Skinner Family Fund
 Strauch Family Fund
 Thornton Family Charitable Fund
 Two Rivers Giving Circle Fund
 Valerie Wilbur Health Policy
 Fellowship Fund
 Van Order and Barney Family Fund
 W. Randy Smith Family Fund
 Wurzburg/Hill Family Church Fund
 Wurzburg/Hill Family Fund



26 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. AIDS. 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.

Arch Gleason Memorial Fund (seed)
 Bonn Poland Family Roundhouse Recreation Fund
 Burke Family Charitable Fund for Animals
 C. Scott and Elizabeth C. Shade Youth Fund
 Campaign Against Litter Fund
 Catherine S. & Clarence E. Martin, Jr.
 and F. Juanita & Vernon L Gray Fund
 Don and Polly Roach “Friends of Animals”
 Free Spay & Neuter Fund
 Eastern Panhandle CARE Clinic Fund
 Eastern Panhandle CARE Fund
 Eastern Panhandle Mini-Grants to Teachers Fund
 Endowment for Recreation
 Endowment for the Arts
 Frada Fine Berkeley Education Fund

Frances Frye and June Orndorff Fund
 Hampshire County Education Fund
 Hampshire Volunteer Emergency
 Medical Services Fund
 Helen Parker Willard Fund
 Housing Action Fund
 J. Holland and Anita Rannells and Gorda
 and Mona Saville
 Jane P. Snyder Youth Fund
 Robert A. Sanders Fund
 Snyder Family Charitable Fund
 Tom and Virginia Seely Morgan County Children’s Fund
 West Virginia Nursing Home Resident Fund (seed)
 William Brady and Jean Taylor Rannells Fund
 Youth Advisory Council Charitable Fund

57 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.

Anna Jo Crosby Scholarship Fund
 Berkeley County Teachers’ Scholarship Fund
 Bill and Fran Wylie Scholarship Fund
 Bob and Betty Wilson Family Scholarship Fund
 Chad Hammond Memorial Scholarship Fund
 Clyde E. Smith Jr. Fund
 David A. “Hawk” Hawkens Scholarship Fund
 Deborah, Leslie, and Christopher Bright Achievement Fund
 Derflinger Earth Sciences Scholarship Fund
 Destiny Baptist Church Patrick J. Walker Scholarship Fund

Dr. Gwen Steeley Memorial Scholarship Fund
 Dr. N. Blaine Groves/Rotary Scholarship Fund
 East Hardy County Vo-Tech Training Scholarship Fund
 Eastern Panhandle WVU Alumni Association
 Scholarship Fund
 Edgar McKee and Ethel Downs Sites Scholarship Fund
 Emily C. Cooper Bee Line Chapter of N.S. DAR Scholarship
 Emily C. Cooper Jefferson County ROTC Scholarship Fund
 Erin Sponaugle Scholarship Fund
 Fischer Family Fund

57 SCHOLARSHIP FUNDS (Continued)

Floyd and Isabel Jacques Memorial Scholarship Fund
 Fulton L. Walker, Jr. Scholarship Fund
 George W. and Holly Woods Hancock Scholarship Fund
 George Whitehair Scholarship Fund
 Harry H. Hardie - James Rumsey Scholarship Fund
 Inspiration Scholarship: In Memory of Thelma Henry
 and Viola Hedges (seed)
 J. Oakley Seibert Scholarship Fund
 Jerry Shingleton Scholarship Fund
 John and Alvina Chalmers Pappas Memorial Fund
 Karos Family Fund
 Kaylee Grace Whetzel Scholarship Fund
 Lauren Le-An Porterfield Oblak Scholarship Fund
 M. Frances Secrist Scholarship Fund
 Martinsburg 200th Anniversary Scholarship Fund
 Martinsburg High School Class of 1964
 Scholarship Fund
 Mary and Walter Duke Teachers Scholarship Fund
 Mary Morrow Van Metre Yoe Scholarship Fund
 Millers Electric Scholarship Fund
 Morgan and Robert Owens Scholarship Fund
 Oscar H. Bean, Bill Clark, Clarence "Hink" Fisher
 and Tom Hawse II Scholarship
 Overington Scholarship Fund
 Paul Ropp Memorial Scholarship Fund
 Polly Dillon Scholarship Fund
 R.L. Johnson Jr. Scholarship Fund
 Rae Ellen Scanlon McKee Scholarship
 Robert Rentschler Memorial Fund

South Jefferson Ruritan Scholarship Fund
 Susan Knott Memorial Scholarship Fund
 Susan Wellford Smith Scholarship Fund
 Terry Lee Walker Jr. Scholarship Fund
 The Woods Scholarship Fund
 Theodore K. Oates Nursing Scholarship Fund
 Todd Mosby Memorial Scholarship Fund
 Walter and Mary Jo Ziler Brown
 Scholarship Fund
 West Virginia Wing-Civil Air Patrol Cadet
 Scholarship Fund
 Whalton Family Fund
 Wilda Michael Memorial Scholarship Fund
 Wurzburg Family Scholarship Fund



8 UNRESTRICTED FUNDS

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.

Berkeley County Community Impact Fund
 Centennial Visionary Fund
 Doug and Joan Roach Visionary Fund
 Endowment for the Community
 Hampshire County Community Impact Fund
 Hardy County Community Impact Fund
 Jefferson County Community Impact Fund
 Morgan County Community Impact Fund

54 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.

A planned gift is an extraordinary way to leave a lasting legacy to honor you, your family and your community. The Community Foundation may not receive your planned gift for years to come, but we are here today 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.



The Legacy Society donors listed in the column to the right 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.

26 PARTNERS IN PHILANTHROPY

The Eastern West Virginia Community Foundation enjoys the support of many businesses in the area. Our Partners in Philanthropy connect us to resources by contributing amounts ranging from a few hundred dollars to \$3,500 per year. 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, the late summer Emeritus and Nonprofit Leaders Luncheon, and our newest "friendraising" event – a mid-winter breakfast to honor our donors and grantees.

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

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

Cornerstone Sponsors

JEFFERSON
DISTRIBUTING

BB&T WEALTH

Bowles Rice
ATTORNEYS AT LAW

U First United
Bank & Trust

ROCS
LOCAL MARKET

ROACH
Energy

UNITED
BANK

CNB
Bank, Inc.

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

Hampshire Affiliate Partners in Philanthropy

Cornerstone

Bank of Romney
Northern Eagle Inc.
Valley Health

Gold

Coldwell Banker Home Realty
FNB Bank
SJ Morse

Hardy Affiliate Partners in Philanthropy

Underwriting

Foltz Litter, Inc.
Northern Eagle Inc.

Platinum

Capon Valley Bank
Foltz Litter, Inc.
Pendleton Community Bank

Cornerstone

Summit 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 Houyoux
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
Ruth Pritchard
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 Hawken's Whalton
John S. Wharton
Helen Mae Wolford
Gretchen Wurzburg
Robert B. Yoe



343 GIFTS TO THE COMMUNITY FOUNDATION

Gifts from 343 donors combined with excellent market returns of 15% helped the Community Foundation build our assets under management to more than \$23.4 million by the end of 2017. Considering that we are only in our 23rd year, this is truly exceptional growth and we are grateful to all the 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 a fund, contribute to an existing one, leave a legacy, or support favorite charities. Please feel free to contact us with your questions or comments at any time.

Over \$10,000

John Allen
BB&T Wealth
Bowles Rice
Eastern Panhandle CARE Clinic
Patrick and Leigh Fleming
Estate of Virginia Lee Gibbons
Healthy Smiles of the Eastern Panhandle
Jefferson County 4-H Foundation
Charles E. Mason
D. Scott and Linda Roach
Roy and Gwen Steeley Foundation, Inc.
Ruth Heishman Estate
Charles and Trudy Seita
Dr. John B. Sutton
Bill and Nancy White

B. Lee Snyder
United Bank
Hank and Dale Walter
David and Teresa Waugerman
Paul and Lisa Welch
Michael and Susan Whalton

Summit Community Bank
The Hedges Company
Larry and Pam Thornton
Valley Health

Up to \$2,500

Dan Anderson
Bank of Romney
BCT - Bank of Charles Town
Craig and Taffnie Bronzert
Chad Hammond Scholarship Fund
City National Bank
Stanley and Sarah Corwin-Roach



Dan Ryan Builders Charitable Foundation
Lawrence and Clare Foley
Foltz Litter Inc.
Gateway Garden Club
Bruce and Sheryl Goins
C. Leslie Golliday III
Chris and Sherri Janelle
Jefferson County Historic
Landmarks Commission
Larry and Cindy Johnson
Herb and Betty Kreinik
Floyd and Mike Kursey
David and Amy Pancake
Pendleton Community Bank
Steve and Tina Roach
Robert and Mary Taylor
Malinda Shaver
Brad and Erin Sponaugle
Richard D. Stephens

Up to \$1,000

Doug and Carol Allemong
Donald and Beverly Baker
Baker Ruritan Club
Oscar and Dixie Bean
Dannie Wall and Wayne Braunstein
Morris DuChemin and Elizabeth Brent
Bright Funds Foundation
Alan and Ginger Brill
Walter and Mary Jo Brown
James and Frances Bullett
Capon Valley Bank
Gat and Susan Caperton
Linda Case
Richard Mier and Rita Caufield
Ford and Jane Davis
Nathan Dehnke
East Hardy High School
Erdem and Joan Ergin
Eleanor Finn
FNB Bank
Mr. and Mrs. Michael Funkhouser
Grant County Bank
Fred and Martha Hardman
Hawse Shop n Save
Richard and Mary Jane Heffle
Chip and Karen Hensell
Mr. and Mrs. Monte Hicks
Michael and Maria Huppe
Hon. and Mrs. George Karos
Kings Daughters Hospital Alumni
Little Capon Baptist Church
Martinsburg Sunrise Rotary Foundation
Judi McIntyre
Sam Mills
Harold and Jean Monahan
Moorefield Lions Club
Milly Mullins
Mitch and Pam Orndorff
Christopher Palmer
Mark and Sue Ann Palmer
Eric and Cynthia Pierson
Rick and Donna Pill
Buzz and Lisa Poland
Progressive Printing & Graphics
Hassan S. Rasheed

Up to \$10,000

Rex and Connie Barnes
Dennis D. Barron
Robert Bowen
Martin Burke
Craftworks at Cool Spring
David and Dana DeJarnett
Paul and Pamela Gavin
Ormond and Karen Hyers
Andrew and Kakie McMillan
Bob and Tia McMillan
John and JoAnn Overington
Don and Deborah Patthoff
Ruth Pritchard
ROCS Local Market and Roach Energy
Trinity Lutheran Church
Darlene Truman

Up to \$5,000

American Woodmark
Foundation, Inc.
BB&T
CNB Bank, Inc.
Henry B. Davenport III
First United Bank & Trust
Jefferson Distributing Co.
John P. Lantzy
Martin Luther King Scholarship Committee
Northern Eagle Inc.
Hazel Parsons
Polly Roach
Rotary Club of Charles Town

E. Daniel and Virginia Rowzie
S.J. Morse Company
Mary Sas
Michael Schaeffer
Peter F. Smith
Richard and Ruhamah Strite
J. Mark and Laura Sutton
Joe and Becky Szabo
Thorne & Keplinger, Inc
Patrick and Nena Tierney
Robin Truax
Terry and Margaret Walker
Emily Waters
Steve and Lucy West

Up to \$250

Anonymous
Tom & Patty Austin
Baker Insurance Services
Dr. Kenneth Banks
Veronica Banks
George and Rosie Barnes
Stephen N. Van Order and Anne H. Barney
Bob and Ann Baronner
Les and Carolyn Barr
Robert E. Barrat
Dr. Anne R. Basham
Oscar and Dixie Bean
John and Anne Beatty
Todd and Barbara Beckwith
Brian and Catherine Bernasek
Beta Sigma Phi Sorority
Bickers Consulting Group, LLC
Mark and Elaine Bobo
Brad Bolyard
William and Victoria Bonifant
Lawrence and Pamela Boomer
Stewart and Candace Borger
Boswell & Associates
Timothy and Mary Alice Bowers
Norma Bowyer
Catherine R. Boynton
Dale Buck
Don W. Bullett and Traci L. Carter
Monroe and Barbara Burger
William and Katherine Butcher
Bruce and Susan Butler
Carroll D. Butler
Dorothy Butler
Norma J. Butts
Barbara J. Caballero
Caperton Furniture Works
Vivian D. Carson
Ethel Carter
Claytor Enterprises, LLC
Jane Clipp
Ellen Cooke
James and Patti Cooper
Copenhaver Rentals
Anthony Cordell
County United Way
Cox Hollida Price
Philip and Frances Cox
Larry and Geri Crawley-Woods
Kimberley D. Crockett
Clarence and Sharon Curry
Kerry Dailer
James and Diane Dailey
David and Candace Dalton

Duane and Madeleine Dassow
Paul Daugherty
David Sarkus International
Travis and Amy Delaplain
John and Karen Delligatti
Harlan and Elizabeth Diggs
Clark and Ora Dixon
Robert and Rita Donadieu
Dopson & Associates, PLLC
Richard and Vicki Douglas
Stephen and Katie Driscoll
Walter and Mary Duke
Eastern Building Supply
Elmore Funeral Home
Elwood and Yvonne Williams
Larry Emery
Ernest and Austine Evans
Philip Fearnow
Mr. and Mrs. Michael Ferro
Mr. and Mrs. Calvin Fleming, Jr.
Jerry Fogle
Joe and Mari Freno
Felicia Fuller
Garrett and Garrett
GFWC Moorefield Womens Club
Bondy Shay Gibson
Giffin Funeral Home
Katie Jo Brown and Jerry Giffin
Michele Goldman
Claudette Graham
David and Joni Greenberg
Bill and Julie Gregg
Kenneth and Rebecca Gregory

*"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

Stephen and Gina Groh
Steve and Debbie Grove
Jacob and Carol Gruver
Edward and Cynthia Hall
Mr. and Mrs. Spencer Hamilton
David Hammer and Euphemia Kallas
Hardy Telecommunications
Michael Graninger and Kristi Hedges
Lisa Hendrick
Pamela Hessler
Nancy V. Hexmoor
Highland Trace Realty
D. Frank Hill, III
Denise Hott
Jim and Julie Howell
Jackson-Williams Appraisers, Inc
Jefferson Security Bank
Joy Bridy Pottery LLC
Henry and Amy Kayes
Anthony and Dawn Kearney
Michael King
Kiwanis Club of Shepherdstown

Kathryn Cole Kling
Tina Ladd
Joyce Lamphier
Kenneth Larson
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John and Judith Lucas
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Dolores Maheux
Lynn and Mae Marshall
Martin Distributing Company
Gary and Vicki Mason
Mathias Ruritan Club
Elaine Mauck
Mayor and Council of Boonsboro, MD
Adam McKenery
Richard and Vickie McLaughlin
Julia McMillan-Jones
Paul and Valerie McNeill
Medicap Pharmacy
Gilbert Meyer
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Amy S. Moroney
Mountaineer Veterinarians
Michele Moure-Reeves
Patrick and Beverly Murphy
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Ronald and Joan Ohl
Wayne and Kip Omph
Marvin and Shirley Orndorff
Otterbein Seekers Class
Don and Amy Owen
David I. Pancake
Samuel J. Pannuty
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Carl and Helen Phillips
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Brett and Linda Roach
Lee Robertson
Rick and Stacie Rohn
Rotary Club of Romney
Joe and Terri Rotunda
Tom and Ruth Rowan
Linwood and Laurie Rudolph
Dean & Betty Russell
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Craig Sencindiver
Shaffer Funeral Home
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William and Lucinda Smith
Marti Smith
Phyllis Somers
St. Agnes Catholic Church
Dan and Joan Starliper
Nanette Stevens
Richard and Marcia Stickley
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 Michael and Mocha Tolbert
 James and Shirley Tolbert
 Karen Trent
 Neil and Karla Troppman
 Daniel and Theresa Valencic
 Vault Communications

Roger and Jennifer Von Elm
 Richard Wachtel
 Beth Wagner
 James and Carol Wainwright
 Kenneth and Diane Walker
 Daniel and Deborah Walker
 Wardensville Lions Club
 Daniel and Sonja Waters
 Bill and Janis Wertman
 William Wheeler
 Catie Wilkes-Delligatti
 Gary Wilkins
 Jefferson and Sarah Wills
 Angela Zirk

KEEP 5 LOCAL

West Virginia is experiencing the largest generational transfer of wealth in its history, and thanks to a statewide program called “Keep 5 Local,” community foundations have a tool for harnessing those resources.

If West Virginia communities can capture at least 5 percent of today’s wealth, it will translate to millions, if not billions, in community philanthropy funding across the state. By encouraging local residents to take a new look at philanthropic estate planning through the lens of a community foundation, West Virginia can see a powerful private sector solution to its longtime local charitable needs.

Paul Daugherty, president and CEO of Philanthropy West Virginia, said Keep 5 Local is using economic data compiled by “transfer of wealth” studies that have been conducted in at least 33 counties.

“As wealth transfers from generation to generation, a lot of it is expected to leave the state,” Daugherty said. “But if we manage to keep at least 5 percent of it in West Virginia, we could see thriving communities in every corner of the Mountain State.”

The Eastern West Virginia Community Foundation has completed a transfer of wealth study for each of the five counties we serve: Jefferson, Berkeley, Morgan, Hampshire, and Hardy and the results are astounding. Jefferson and Berkeley counties alone have more than \$15.5 billion in personal wealth today and more than \$3.6 billion will be transferred to the next generation during the coming 10 years. If 5 percent of that wealth were to be contributed to the Community Foundation for philanthropic purposes, we could grow to more than \$180 million and will be granting nearly \$9 million per year.

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

Gifts were made in memory of:

Aaron Darnell
 Arch Gleason
 Bill Doman
 Bob Baronner
 Boyd May
 Charles Ellison
 Charles Hensell
 Daniel Householder
 Desiree' Shields
 Don Roach
 Dr. William Rodgers
 Erin Pancake
 George Stephens, III
 Jim Smith
 Joan Roach
 Joshua Barnes
 Lizy Augenstein
 Nancy E. Needy
 Ray and Carol Funkhouser
 Rev. Mason Cooper
 Robert Lowe
 Stefani Pierson
 William Thompson

Gifts were made in honor of:

Amy Pancake
 Ashley Pill
 Ben Guell
 Bob and Tia McMillan
 Brian and Darlene Truman
 Brian Hott
 Katie Pill
 Lora Foltz
 Michael Funkhouser
 Paul and Diane Kradel
 Rosabell Roman
 Susan Whalton
 Yvonne Williams





7 PRESIDENTS AND A BRIEF HISTORY

Since its inception in 1995, the Eastern West Virginia Community Foundation has been led by seven individuals serving in the capacity of President. Doug Roach was elected the organization's first president. He and the other board members volunteered their time and did everything those first six years while laying the groundwork for future success.

Tia McMillan followed Doug as president and recruited Amy Owen as the organization's first paid employee. During her decade-long tenure, Amy did a remarkable job of cultivating relationships with donors, financial institutions, and nonprofit organizations.

During Diane Dailey's term as president, the Eastern West Virginia Community Foundation moved into its current offices at the renovated Caperton Station at 229 E. Martin Street in Martinsburg. As total endowments under management grew, Amy was able to bring onboard two exceptional employees—Amy Pancake to coordinate scholarships and help expand operations into Hampshire and Hardy counties; and Felicia Fuller to serve as Finance and Administration Manager, responsible for the complex fund accounting systems and daily financial operations.

Stew Borger became president in 2007 and he piloted the Community Foundation through the Great Recession. Investment markets began to improve steadily in the spring of 2009 and by the end of 2010 virtually all losses had been erased and funds were back above historic dollar values.

Stew completed his tenure as board president in 2012 and handed the reins to Scott Roach. In a fitting tribute to family and

legacy, Scott began serving his first term as president the same year that his father (and founding president) Doug rotated off the board due to term limits.

The Community Foundation celebrated its 21st year in 2016, with new programs and projects that helped the organization continue to grow. Darlene Truman, long time board member and donor, served as President of EWVCF in 2016 and 2017 during a time of great success.

Donors and investment markets alike have been very kind to the Community Foundation, with the average endowed fund enjoying a 7.5% annual rate of return over the past seven years. By December 31, 2017, when Darlene completed her two-year term as President, the Community Foundation was managing 225 endowed funds with assets of just over \$23.4 million.

Lisa Welch, who worked her way up through the ranks as Secretary, Treasurer, and Vice President is currently serving her first year as President. Like the six presidents before her, Lisa has a keen mind and a passion for philanthropy. We are truly grateful for the service provided by these community leaders and all the board members who have served during the past 23 years.

Thank you,
Michael Whalton, Executive Director



HOW

DOES THE COMMUNITY
FOUNDATION *WORK*



IT STARTS WITH
DONORS



INDIVIDUALS



CORPORATIONS



PRIVATE
FOUNDATIONS



NONPROFIT
ORGANIZATIONS

WITH A
PASSION



ARTS



EDUCATION



ENVIRONMENT



COMMUNITY
WELLNESS



FAITH

WHO USE THEIR
GIFTS



CASH
SECURITIES
REAL ASSETS
RETIREMENT FUNDS
INSURANCE
BEQUESTS

TO
CREATE
ENDOWED FUNDS



DISTRIBUTIONS
FROM THE ENDOWMENTS FULFILL THEIR
CHARITABLE PASSIONS THROUGH



SCHOLARSHIPS FOR
STUDENTS



GRANTS TO CHARITABLE
ORGANIZATIONS

**ALL
ENDOWED
FUNDS:**

UNRESTRICTED
DONOR ADVISED
DONOR DESIGNATED
AGENCY
SCHOLARSHIP
FIELD OF INTEREST

ARE GOVERNED BY
AN AGREEMENT BETWEEN
COMMUNITY
FOUNDATION
AND THE DONOR

**THE COMMUNITY FOUNDATION
TEAM** →

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

Hampshire County Community Foundation
PO Box 40
Romney, WV 26757
304-822-7200
www.hampshireccf.org

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