



Legacy

The Community Foundation of Shelby County

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Bruce Boyd,
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Marian Spicer
Executive Director

Barbara Stueve,
Administrative Assistant

Kristine Poland,
Grants Associate

Organizations Create Funds to Support Their Futures

Not-for-profit organizations serve residents by providing services that educate, support or enhance lives. The economic downturn has impacted organizations through the loss of public grants and reduced support from individuals and corporations.

How does a board of directors attempt to stabilize future funding and continue their organization's mission? Many organizations have created organization funds that provide a platform for donors to make gifts today or through their wills.

Organization funds are intended to be long term or permanent funds that are invested and provide money back to the establishing organization. They are not meant to replace a charity's bookkeeper or annual operations checking account. The larger each organization fund grows, the more it can help with the organization's operational or programming expenses.

Congratulations to the nine organizations that are planning for their futures by establishing organization funds. These funds may receive gifts from anyone, at any time and in any amount. Checks should be made payable to Community Foundation of Shelby County with a note on the memo line including the name of the organization.

- Alpha Community Center Fund
- Compassionate Care Free Clinic Fund
- Operation Rebirth Fund
- Right to Life of Shelby County Fund
- Senior Center of Sidney-Shelby County Foundation
- Sidney Rotary Charitable Fund
- Shelby County Arc Fund
- Shelby County Historical Society Fund
- Wilma Valentine Creative Learning Center Fund



Shelby County Historical Society Fund



Wilma Valentine Creative Learning Center Fund



Compassionate Care Free Clinic Fund



Senior Center of Sidney-Shelby County Foundation

Q & A:

Q: What is a 'donor advised' fund?

A: Donor advised funds enable the person(s) who established a charitable fund to stay involved in grantmaking and investment decisions. Sometimes their children or a representative committee assume the role of the donor in those decisions. Grants from these funds may go to most charities in the United State and may bear the donors' names or be anonymous.

The Community Foundation offers two types of donor advised vehicles: the Charitable Distribution Account (CDA) and a traditional longer term charitable fund.

The CDA is considered a short term fund that enables donor advisors to recommend grants with the intention of depleting the entire gift quickly or over time. CDAs are not listed in our publications and they are held in a money market type of account.

The more traditional donor advised fund tends to be long term or permanent. They are listed in our publications and the balance is invested. They are excellent ways to achieve a charitable deduction today, while enjoying charitable giving for years to come.

See our website for information or contact Marian Spicer, Executive Director at mspicer@commfoun.com or (937) 497-7800.

New Charitable Funds

The Community Foundation proudly announces the creation of eight new charitable funds within the past several months. Thank you to the individuals, families and boards of directors who chose to leave a lasting impact on the community through the following charitable funds:

- Alpha Community Center Fund – organization fund
- Botkins Track and Soccer Complex Fund – project/campaign fund
- Compassionate Care Free Clinic Fund – organization fund
- Dave and Ann Monnier Family Foundation – donor advised fund
- Operation Rebirth Fund – organization fund
- Raise the Roof for the Arts Fund – project/campaign fund
- Louise Sheets Scholarship Fund – scholarship fund – part of the Botkins Local School Foundation
- Wilma Valentine Creative Learning Center Fund – organization fund

Thank You!

Carol Bennett Joins the Board



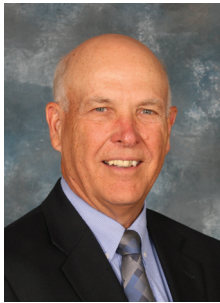
Carol Bennett

Carol Bennett has been appointed to a five year term on the board of trustees.

A former business owner, she has degrees from Sinclair Community College and is a graduate of the American Institute of Banking. Carol's list of volunteer activities include Holy Angels School, Lehman High School, Charity League, Sidney Women's League, the Red Glove Revue and the Gateway Arts Council.

Originally from Dayton, she and her husband Walt have resided in Sidney for 33 years. She is the mother of two daughters.

She replaces Ed Borchers of Russia, who served as a trustee since 1999, including four years as chairman of the board of trustees. Welcome Carol! Thank you Ed!



Ed Borchers

Giving Thought



"One thing that is constant is change." This often-used phrase rings true with the changes brought about with a recession and the slow recovery. Programs, activities and organizations we thought would always

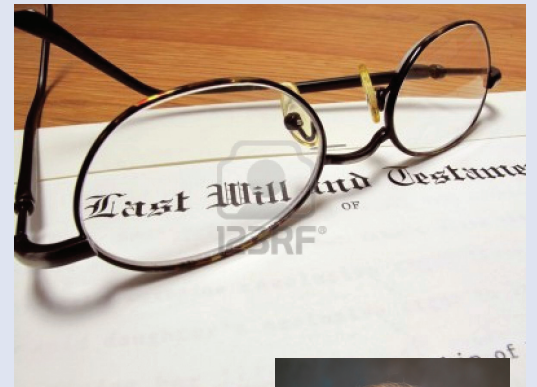
be here have downsized, changed or been eliminated. What do you feel are important parts of the community that should be continued for current or future generations? Have you considered making a gift to add to or create a charitable fund to keep that important program, activity or organization going?

-Marian Spicer, *Executive Director*,
Community Foundation of Shelby County

ESTATE PLANNING SEMINAR

End of Life Planning: The Final File

Will your family be able to find your will or advanced directive paperwork? Do they know of the life insurance policies, bank and investment accounts and security boxes you have? Learn which documents you need to include and how to organize them. A multi-pocket folder will be given to attending couples or individuals to help you organize your documents.



Tuesday, September 20, 6:30-8:00 p.m.
Sidney American Legion, 1265 Fourth Ave, Sidney

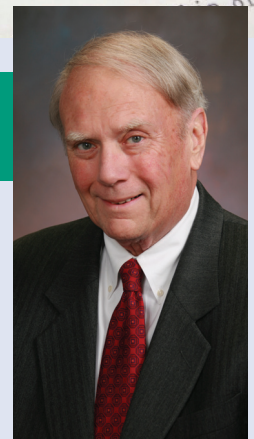
Presenters:

Harry Faulkner, attorney
Susie Weisenbarger, RN (retired)

RSVP by Sept. 16
to Marian Spicer at
(937) 497-7800 or
mspicer@commfoun.com

The seminar is a collaborative effort of

The Community Foundation of Shelby County
The Lehman High School Foundation
The Sidney-Shelby County YMCA Foundation
The Wilson Memorial Hospital Foundation



Harry Faulkner



THE COMMUNITY FOUNDATION
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Our Mission

To cultivate, administer and distribute legacy gifts for the benefit of our Community.

The Community Foundation of Shelby County

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What is the Community Foundation of Shelby County?

The Community Foundation of Shelby County is a public foundation that hosts many charitable funds established by local residents or organizations to provide support for favorite causes and charities.

Each charitable fund is given a name and purpose by the individuals, families, or organizations who establish it. Foundation trustees and staff abide by the purpose of the charitable fund, making grants to specified causes or organizations in the name of the fund. We provide the administrative structure for funds including gift acceptance, asset investment, grant disbursement and tax filing. Most funds are intended to be perpetuating endowments, but some have a defined life span such as the completion of a community project.

We Are on Facebook!

Yep - you can find the Community Foundation of Shelby County of Facebook! Find us and "Like Us" - stay in touch! We are always posting the latest in grants, funds and scholarships, plus much more.

