

The view from the Gaston watertower

LEGACY

GASTON



THE COMMUNITY FOUNDATION
of Muncie & Delaware County, Inc.

Where neighbors create legacies



LET'S TALK

The Community Foundation is a good neighbor. Throughout Muncie and Delaware

County we lend a listening ear, make connections, and help move important projects forward to improve the quality of life for the people in our community.

We like to talk about the good work being done throughout the community, and how we are a part of that. Through our grantmaking, it's easy to show our partnership with many nonprofits. We help them meet their missions and serve Muncie and Delaware County.

We aren't just a partner to nonprofits. We partner with individuals and families to turn their philanthropic dreams into reality. In this issue of Legacy, you'll read the story of Betty Jane Clark-Carter. The Community Foundation helped her take an idea to better her community and establish a grantmaking fund designated to benefit Gaston. You'll also read about the Merritts who worked with the Foundation to ensure that their estate plan would leave lasting gifts to the organizations that matter most to them.

We know that you have ideas to help your community, too. We want to hear about them. Together, we can find a way to turn your charitable dreams into reality. Remember, like a good neighbor, we're only a phone call away.

Kelly K. Shrock, President

GASTON DONOR LEAVES LASTING LEGACY IN HER TOWN



Betty (middle) stands with friends and coworkers at the VA Hospital in Marion where she spent her career as a nurse.

Community member Betty Jane Clark-Carter saw a need in Gaston, the town she called home. The rural community changed over the years that she lived there, and she had an idea to help make things a little bit better for her neighbors.

"Betty was a generous person," said Jamie Wormer, who was Betty's neighbor and friend for more than 15 years. "I think she realized that she had more than she needed in her life and wanted to give that away to make a difference in the lives of the people around her."

Jamie, who served on the Gaston Fire Department for many years, had worked with The Community Foundation to secure grants for supplies and upgraded equipment for the fire department. He explained to Betty that a fund at the Foundation would have a lasting impact on the community, and that funds can be designated based on the donor's charitable wishes.

In 2012, Betty approached The Community Foundation to anonymously establish a fund that would directly benefit the town of Gaston. Betty hoped that the fund would set an example for others to give back as they are able.

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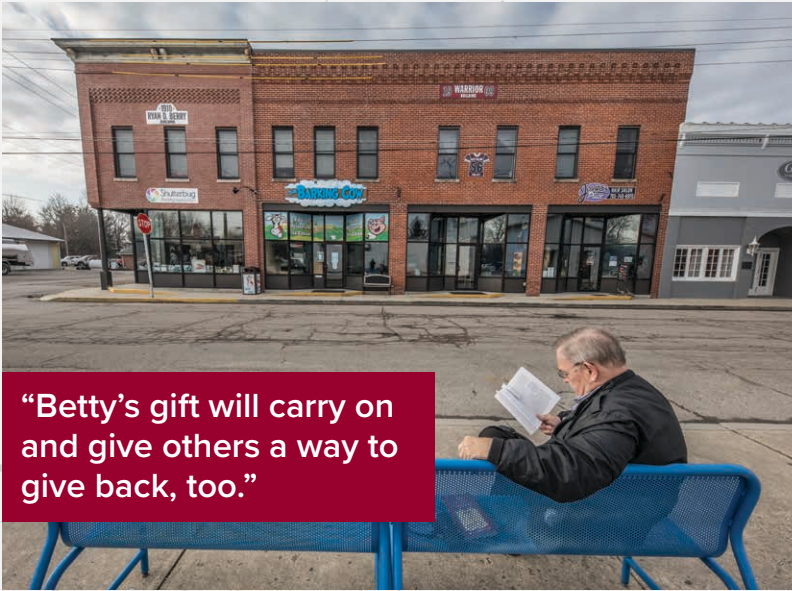
Helping others came naturally to Betty, who worked as a nurse at the VA Hospital in Marion during her career. She had a passion for health, and in her free time she could be found in her garden growing a wide variety of fresh vegetables and fruits to share with her neighbors.

Matt Gaither grew up next door to Betty and knew her his whole life. Even as an adult, they remained close. He would visit Betty often to help her around her house with mowing or repairs. Sometimes the visit would include time where the two would sit and chat. A true friendship emerged. Betty talked with Matt about her desire to give back to benefit others.

“As we talked, Betty made it clear that she didn’t want the gift to be about her,” said Matt. “She really wanted to see the money she had worked for her whole life to benefit the most people possible. A fund at the Foundation could help her do that.”

Betty asked that the Foundation keep her status as the founding donor a secret during her lifetime. Betty passed away just a week before the town endowment grants were announced in 2018. Even though her identity as the donor was unknown, she set an example for others in Gaston.

As community members began to see the impact of the grantmaking in the community, the idea of this fund for Gaston caught on. In 2016, the fund had six new donors. Today, more than 16 individuals have supported the Gaston Town Endowment Fund with gifts. In 2018, donors even helped the fund capture \$5,000 in matching funds to support grantmaking in the community.



“Betty’s gift will carry on and give others a way to give back, too.”

“Betty and I spoke each year about the grants made from the fund and about their impact on the Gaston community,” said Kelly K. Shrock, president of The Community Foundation. “When we spoke after the 2017 grants were awarded, Betty was pleased with the grants being made. She showed a special interest in the grant to the Wes-Del preschool that year.”

Gaston community members not only have a role in growing the fund, but they also determine the beneficiaries of grants made from the fund. A committee of five individuals who live or work in Gaston, or in Harrison or Washington Townships review grant applications each May. Grants are awarded in June to deserving nonprofit organizations.

“Betty was always eager to hear updates on the Gaston Town Endowment Fund,” said Jamie, who also serves as a member of the Gaston Grants Committee at the Foundation. “It satisfied her mind that she had given her money in a way that would carry on and that it was giving others a way to give back, too.”

Since the first grant was awarded in 2013, 10 programs at Gaston-serving organizations have been supported by more than \$13,500. Grants have benefited Wes-Del Community Schools,

Gaston Lions Club, the Youth Athletic Association, and Cardinal Greenways. Grants have supported health initiatives, purchased equipment for students, assisted with kindergarten readiness, and made improvements at facilities throughout Gaston.



Betty, seated, and her nieces.

With commitment from community members, the fund continues to see growth and will continue to grant funds to benefit Gaston today, tomorrow, and always.

The Community Foundation supports projects and programs that benefit all communities across Muncie and Delaware County. Three town endowment funds have been established by caring community members, like Betty, to support Gaston, Selma, and Yorktown – and their surrounding townships. Nonprofit organizations serving these communities can apply for funding through the town endowment programs. Applications are due May 1. More information is available at cfmdin.org.

APPLY FOR TOWN ENDOWMENT GRANTS

Funds have been established at the Foundation to benefit Gaston, Selma, and Yorktown. These funds guarantee a steady stream of income to support worthwhile programs and projects in these communities for years to come. Applications are accepted from nonprofit organization or units of government. Each community has a committee of residents who review grant applications once each year.

Gaston

Grants of up to \$2,500 will be awarded to benefit projects and programs in the Town of Gaston and Harrison and Washington Townships.

Selma

Grants of up to \$500 will be awarded to benefit projects and programs in the Town of Selma and Liberty and Perry Townships.

Yorktown

Grants of up to \$2,500 will be awarded to benefit projects and programs in the Town of Yorktown.

Application deadline: May 1

Apply online at cfmdin.org

TALK TO US ABOUT BEQUESTS

The language used to make a gift through your will to The Community Foundation can be confusing sometimes. We talk about making a bequest, but what is it really?

Through its Old English origins, a “bequest” was originally a transfer of personal property by will. By historical contrast, the transfer of land occurred through a “devise.” Today, the terms are interchangeable. Many people say a bequest can occur through any end-of-life transfer, not just through a will.

It is common to arrange our bequests in ways that minimize needless taxes and administrative costs. What’s the best way to accomplish this? Will your heirs incur income or inheritance tax? Will your estate have estate tax or hidden income tax liabilities?

Some of this can be confusing and that’s a prime reason why too many put off writing a will. It is intimidating to some folks to set an appointment with an attorney and to discuss unfamiliar topics.

A DONOR’S PERSPECTIVE

Community Foundation donors, Gary and Lana Merritt decided to have those conversations.

A few years ago, Middletown native, Gary, and Muncie native, Lana, decided they wanted to give back to the communities they called home. Through conversations with the Foundation, they decided to join The Community Foundation of Muncie and Delaware County’s Legacy Society. Two new funds will be established through the Merritts’ estate plan.

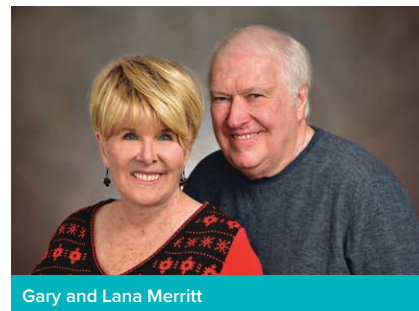
The couple holds a special place in their hearts for the animals in their lives. During their 46 years of marriage, they have had a variety of pets. Today, their family includes two cats.

“You just build a special relationship with pets,” explained Gary, who also regularly walks his nephew’s dog, Sophie, while visiting friends in his hometown.

Gary and Lana want to make a difference in the lives of animals through a bequest. Future funds established in the Merritts’ name will benefit animal serving organizations – Animal Rescue Fund and Best Friends Animal Society, a national nonprofit focused on saving animals.

Gary explained that working with local community foundations made the process simple.

“We want to support both of our hometowns. Working with local community foundations was the way to do that. If you are looking for a way to give back, talk to someone at the Foundation to learn more about your options. We trust our money will go where we want it to go.”



Gary and Lana Merritt

LET’S TALK ABOUT YOUR LEGACY

We are ready to have these conversations with you.

The Community Foundation can take the confusion out of bequests. In fact, we can send you a brochure that explains in simple terms the basics of having a sound will and what steps to take to get yours. We will take the extra step of helping you plan a future gift to The Community Foundation, if that is of interest.

We are ready to personally assist in answering any questions you may have. We can also help you find a qualified attorney, one who will simplify the process for you.

To learn more about using a bequest to establish your legacy at The Community Foundation contact Kelly K. Shrock, president, at 765-747-7181 or kshrock@cfmdin.org.

2019 FIRST QUARTER COMPETITIVE GRANTS THE FOUNDATION AWARDS 14 GRANTS TOTALING \$550K

We are pleased to announce that \$551,500 has been awarded to 14 organizations during the first Quarterly Competitive Grants cycle of 2019.

A Better Way Services, Inc. received \$55,000 to defray the cost of providing advocacy and services for victims of domestic violence or sexual assault and their children, a 24-hour suicide hotline and a general crisis hotline.

American Red Cross received \$10,000 to purchase a Next Generation Emergency Response Vehicle for Delaware County.

Cornerstone Center for the Arts received \$30,000 to defray the cost to provide quality art education programs.

Delaware Advancement Corp. received \$100,000 to support the operating efforts of the Vision 2021 Economic Development Plan.

Habitat for Humanity received \$50,000 to defray the cost of the 2019 housing program.

Hillcroft Services, Inc. received \$75,000 to support the capital campaign designated for facility and service provision consolidation of programs.

Home Savers of Delaware County received \$50,000 to provide urgent home repairs for low-income homeowners.

Ivy Tech Foundation received \$50,000 to defray the cost of the capital campaign to expand educational facilities in downtown Muncie.

Muncie Arts and Culture Council, Inc. received \$24,000 to provide organizational capacity support.

Shafer Leadership Academy received \$7,500 to provide scholarships for nonprofit organizations and neighborhood association members.

TeenWorks received \$25,000 to pay salaries of Muncie students participating in the summer Career Pathways Initiative.

Urban Light CDC received \$25,000 to defray the cost of housing programs in Muncie’s South Central and Industry neighborhoods.

Youth Opportunity Center received \$20,000 to replace a water heater.

YWCA Central Indiana received \$30,000 to defray the costs of the Emergency Shelter and C.O.T.S. Stay programs.

First Quarter Competitive Grants have been awarded from The Unrestricted Fund of the Community Foundation and the following funds:

Stefan and Joan Anderson Unrestricted Fund, Ball Corporation Community Betterment Fund, Esther Ball Fund, Edmund F. and Virginia B. Ball Fund, Bassett Family Fund, Louisa and Waldo Beebe Unrestricted Endowment Fund, Jane Harrell Buckles Fund, Patrick and Marilyn Cleary Fund, Gordon and Pam Cox Fund, Day Star Center Fund, William and Margaret Dutton Fund, Economic Development Fund, The Endowment for the Arts, John and Janice Fisher Quality of Place Endowment Fund, John and Janice Fisher Unrestricted Endowment Fund, Beulah M. Frogge Fund, Linda and Connie Gregory Fund, Julian and Suzanne Gresham Fund, Jane E. Hughes Fund, KAKATU Foundation/David and Joanna Meeks Fund, Laura Stanley Keppler Fund, Francis Lafferty Fund, Jeff and Beth Lang Fund, LEAP Managed IT Fund, John and Katherine Littler Fund, Michael O. and Nicole T. Lunsford Fund, Mid-West Metal Products Fund, Jon and Barbara Moll Fund, Morris Youth Fund, MutualBank Charitable Foundation Fund, Old National Bank Fund, Mary Kate Pingry Fund, Jim and Mary Rosema Fund, Martin D. and Helen B. Schwartz Unrestricted Named Endowment Fund, Hamer and Phyllis Shafer Fund, Shafer/Muncie Power Products Legacy Fund, Kent Shuff and Steve Fennimore Fund, Jeanne and John Smith Fund, Jeanne and John Smith Unrestricted Fund, Daniel and Catharine Stewart Fund, Charles and Claudia Sursa Unrestricted Named Endowment Fund, David and Mary Jane Sursa Fund, Mary Jane Sursa Fund, Gary and Amy Thomas Fund, Mac and Lila Warrell Endowment Fund, Joseph and Janet Wilson Unrestricted Endowment Fund, Faye Wingate Fund, Youth as Resources Fund



THE COMMUNITY FOUNDATION
of Muncie & Delaware County, Inc.

P.O. Box 807, Muncie, IN 47308
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*Confirmed in compliance with National
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YEAR END TOTALS HIGHLIGHTS FROM 2018

Total Grants by Area of Interest for 2018

Grants totaled \$3,014,092
Arts & Culture \$329,455 / 11%
Economic Development \$110,000 / 4%
Community Betterment **\$755,127 / 25%**
Education **\$972,281 / 32%**
Human Services **\$638,116 / 21%**
Scholarships \$208,623 / 7%



Other Year-end results for 2018

Total contributions = \$3,353,995
Total number of gifts = 1003
Total number of donors = 533
Total number of new donors = 122
Total number of new funds = 19

Legacy is a publication of The Community Foundation of Muncie & Delaware County, Inc.



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Send your donation to
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GIVE ONLINE
Visit cfdm.in.org
to make your donation

MEMORIALS AND HONORARIUMS

The following individuals were remembered or honored through gifts to The Community Foundation from October 1, 2018 to January 31, 2019.

Memorials

Sarah E. Adams
Martha Sue Howard
Addington
Margaret Argabright
Howard Bates
Meryl Biggane
Tobi Bond
Mr. and Mrs. Al E. Boyce
Juanita M. Bragg
Alyx Brinkman
Patricia K. and Franklyn D. Brinkman
William G. Bruns
Ashley Burgauer
Richard and Dorothy Burkhardt
Kay Burress
Judge Steven R. Caldemeyer
Derious Clark
Michael Cox
Patty Ann Orcutt Cravens
David Matthew Crutcher
Thomas Devine
Larry Dollison, Sr.
Michael Fallon
John and Janice Fisher
Ann Craig Galliher
John Ginter
Fredine Goodall
Zach Greenwalt
Julian Gresham
Ann Hannah
Sue Harris
Nina Hatfield
Ben Howells
Jon Hunter

Sally Johnson
E.K. Keesling
Kathleen Keil
Virginia Kellems
Laura Keppler
James and Violet King
Anastasios and Sophia Koumoulides
Kip Laws
Gunner Lee-Hennigar
John B. Lotz
Marjorie Lucas
Ann Louise Miller
Paul Mitchell
Warner Mitchell
Harold Ward Nation
Dr. Allan Nowakowski
Ellen Payne Osborn
William "Bill" Pingry
Bill Putt
John Rallen
Ron Ray
Ann Roberts
Dale E. Schell
Joseph Scherrer
George (Tom) Schnuck
Janis Scott
William "Billy" Shroyer
Dixie Smith
Jeanne E. Smith
Judy Rust Taylor
Todd Taylor
Debra K. Tooley
Dorothy Vaughn
Rex Waldo II
Eileen Walters
Rollin E. Ward

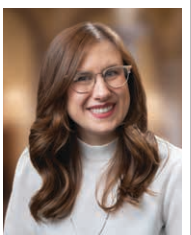
Ruby Webb
Ben Grady Williams
Marjorie P. Zeigler
Jay Zimmerman

Honorariums

Jeff Arnold
Betty Brewer
Jack Buckles
Mary Jo Crutcher
Ted Fullhart
Bill and Vicki Gaddis
Jacob, Brody, Charlotte, and Daxton
Linda Gray
Erma L. Green
Suzanne Gresham
Carolyn Grieves
Kelly Heavilon
Mitch Isaacs
Jeff and Ruth Kiger
Jo Kincaid
Susan Leffler
Liz Ludwick
Michael Lunsford
Linda McGalliard
Malcolm and Ann Metzler
Fred A. Meyer Jr.
Paul Mitchell
Teena Petro
Fred E. Reese
Patricia Schaefer
Kelly Shrock
John Smith
Judy Spry
Carol Sue Templin

WELCOME NEW OFFICE ADMINISTRATOR

The Community Foundation is pleased to welcome Amy Tuttle as office administrator. Amy was raised in Muncie and graduated from Delta High School. She earned her Bachelor of Science in business administration and graphics arts technology from Ball State University. Amy brings with her to the Foundation a wealth of knowledge from management and customer service. Give the Foundation a call, and it's Amy's friendly voice that you will likely hear on the other end of the line. "I'm proud to be a part of the Foundation and to be serving Muncie and Delaware County."



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The Foundation sincerely appreciates all of its donors and the valuable support they provide. All contributors are recognized in our Annual Report.