



**THE COMMUNITY FOUNDATION**  
*of Muncie & Delaware County, Inc.*

# *Our Promise*

**2017 ANNUAL REPORT**

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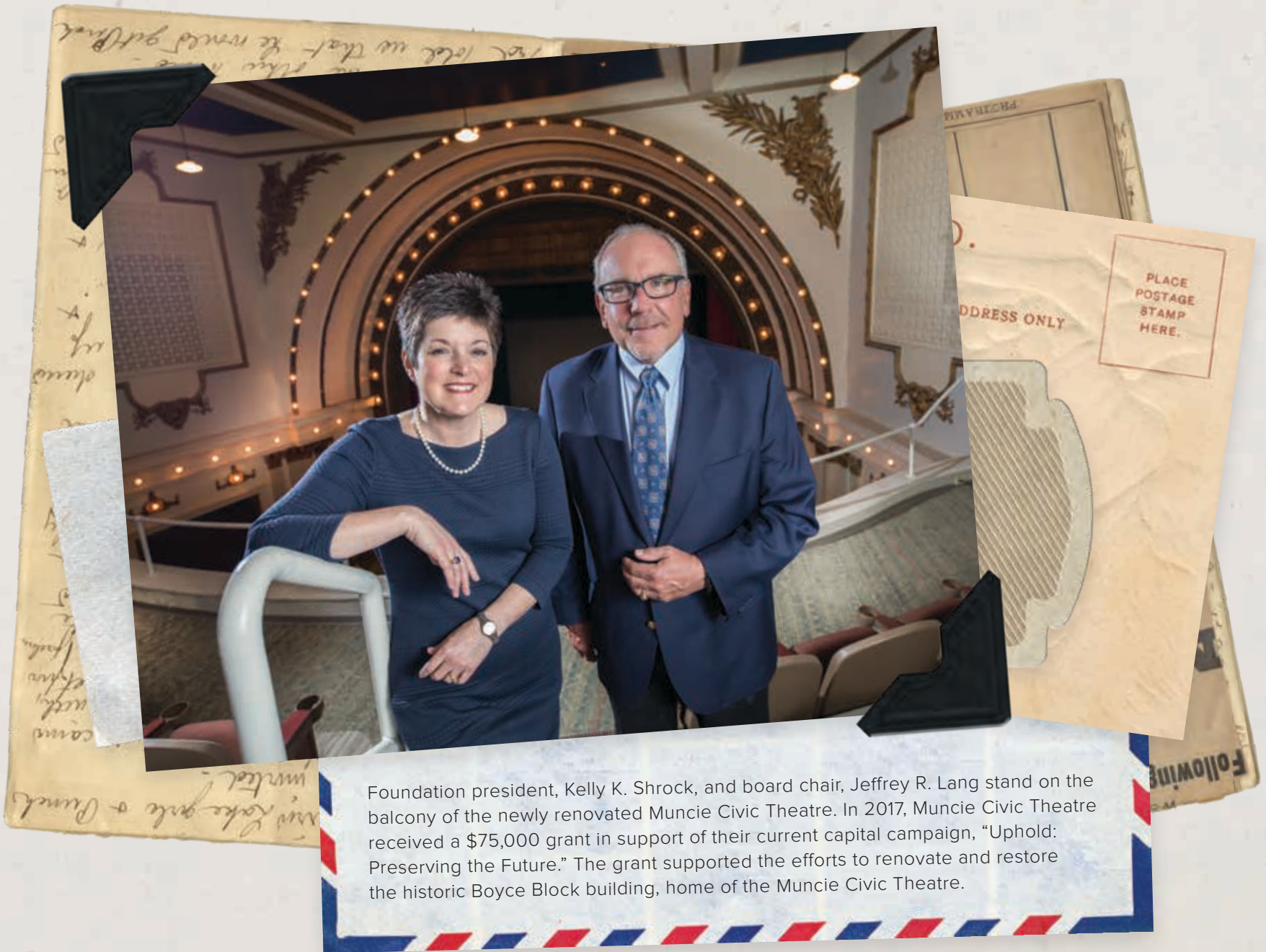
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## MISSION

The Community Foundation of Muncie & Delaware County, Inc. encourages philanthropy, assists donors in building an enduring source of charitable assets, and exercises leadership in directing resources to enhance the quality of life for residents of Muncie and Delaware County.

## VISION

To impact and empower Muncie and Delaware County by enabling philanthropy as a trusted community leader and promoting positive change now and for generations to come.



Foundation president, Kelly K. Shrock, and board chair, Jeffrey R. Lang stand on the balcony of the newly renovated Muncie Civic Theatre. In 2017, Muncie Civic Theatre received a \$75,000 grant in support of their current capital campaign, "Uphold: Preserving the Future." The grant supported the efforts to renovate and restore the historic Boyce Block building, home of the Muncie Civic Theatre.

# Dear Community,

A relationship exists between our community and The Community Foundation. From the Foundation's very beginning, the community and the Foundation made a commitment to support one another to enhance the quality of life for the residents of Muncie and Delaware County.

Each year, community members serve as volunteers, make gifts, create funds, and support the Foundation's programs. At the same time, the Foundation's Board of Directors and staff look for opportunities to engage the community in new ways and meet its ever-changing needs. These community contributions and Foundation actions are like love letters written back and forth, showing our commitment to one another.

This year's report looks like a stack of letters to emphasize our long-term relationship with this community. Inside the report, you'll read about some of this year's greatest achievements. Among them:

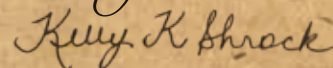
- Our endowment grew to more than \$60 million.
- Donors established 14 new funds.
- 125 new donors and 417 return donors contributed \$1.4 million.
- More than \$2.9 million in grants were distributed throughout the county.

You will also read about some of our signature programs like Town Endowment Grants on page 7 and the David Sursa Leadership Award on page 14. We also highlight our new initiative, Strategic Grantmaking, on page 13.

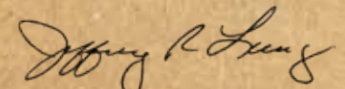
Just like any relationship, people are what make the Foundation find success. This year we celebrated the retirement of the Foundation's communications administrator, Eunice Whitlock, after more than a decade of service. We also said goodbye to Colton Strawser, program officer, and welcomed Carly Acree-King into this role.

We are supported in this promise by a committed Board of Directors that included retiring members Mary Dollison and Marianne Vorhees. We are grateful to Mary and Marianne for their service. We welcomed new members, Trent Dowling and Ermalene Faulkner, who will help us continue our commitment to Muncie and Delaware County today, tomorrow, and always.

Sincerely,



Kelly K. Shrock, President



Jeffrey R. Lang, Chair,  
Board of Directors

# Keeping a Promise Made

As a part of Muncie and Delaware County for 32 years, The Community Foundation is a pillar of our community. Founders wanted the community to have a foundation whose mission would be to improve the quality of life for Muncie and Delaware County. Our founders made decisions that would establish the Foundation permanently for this community. With their guidance, the Foundation would be able to provide a permanent source of charitable assets for our community. That was the promise made in the Foundation's beginning. It's a promise we will keep today, tomorrow, and always.

To make the biggest impact, our relationship with the community must be reciprocal. Donors show their promise to the Foundation with charitable gifts. Gifts come in many forms. Donors can give in cash, appreciated stock, real estate, and in many other ways. Many people give in memory or honor of others at the Foundation. Some even choose the Foundation as the place to leave their legacy with an estate gift.

No matter how they arrive to us, we strive to take those dollars and grow them. In 2017, we celebrated a milestone – our endowment grew to \$60 million. Gifts from donors and prudent investing have allowed our endowment to grow. While it's grown, so has grantmaking to the community.

## Our promise to your legacy

**Where neighbors create legacies.** The Community Foundation provides unique opportunities for individuals to create a legacy during their life and afterward. Leaving a gift through an estate plan, such as in a will or through life insurance, can have a permanent effect on the causes and organizations that matter most.

This year, Nancy Smith established the Nancy J. Smith Fund, a field of interest fund that supports two causes close to her heart - the elderly and animals. The fund will be available to make small grants during Nancy's life. A gift from her estate plan will grow the fund allowing it to make a greater impact on these causes forever.

"It's an easy way to do a lot of good for a long period of time," explained Nancy regarding her decision to establish the Nancy J. Smith Fund and join the Legacy Society. "The Community Foundation has so much history that the trust is there. I think they really do try to honor your wishes even after you've moved on. It's a very easy, effective way to help in a lot of areas. Why not?"

A legacy gift requires a trust and commitment from us and from our donors. It is our promise that we will protect your charitable assets and use them as designated. Members of our Legacy Society have informed us of their planned gift. Listed on the following page are the people who have made a promise to us. You can make that promise, too.



Legacy Society member, Nancy Smith poses with her cat Lambchop. Nancy has worked with the Foundation to establish a fund through her estate that will support two causes that matter most to her – services for the elderly and for animals.

# Legacy Society

Gary W. Addison  
Russ and Judy Anderson  
Anonymous (5)  
David and Joan Bahlmann  
Kathy A. and Gary W. Bartlett  
Robert and Tommye Beavers  
Norman E. and Joyce M. Beck  
Waldo and Louisa Beebe  
Mr. and Mrs. R. Donald Bell  
Jean R. Blake  
Rob and Mary Brodhead  
Jack and Jane Buckles  
Donald G. and Donna Sue Conner  
Gary Dodson and Jill Jereb  
Ron and Cheryl Fauquher  
Chris French  
Connie R. Gregory  
Linda S. Gregory  
Mr. Julian and Dr. Suzanne Gresham  
Charles and Charlotte Hetrick  
Dr. and Mrs. Jeff Hiltz  
Gregory A. Huffman\*  
Richard D. Hughes  
Julianna Jarabak Johnson  
Ms. Roni Johnson  
Tim L. and Sharon H. Kuzma

Jeff and Beth Lang  
Florence "Flo" Lapin  
John and Katherine Littler  
Dick and Liz Marshall  
Dick and Joan McKee  
Howard and Erma McVicker  
Gary and Lana Merritt\*  
Dr. Fred A. Meyer  
Vivian L. Milheim  
Dr. Albert O. Miller III  
Kenneth R. and Glenda D. Miller  
William V. Miller and Annemarie Voss  
Jon and Barbara Moll  
Bruce and Pat Moore  
Erwin C. and Barbara D. Mueller  
The Oesterle Family  
Jack and Thelma Ann Peckinpaugh  
William and Betsy Peckinpaugh  
John and Angeline Pruis  
Jim and Mary Rosema  
Kelly and Joel Shrock  
Bill and Julie Skinner  
Smith Family Fund  
Jeanne and John Smith  
Nancy J. Smith  
Marilyn and Bob Smitson

Kelly and Donna Stanley  
David and Sandra Stocker  
Charles V. and Claudia B. Sursa  
Mr. and Mrs. David Sursa  
Scott M. Terhune  
Helen and Leon Towne  
Terry and Cheryl Walker  
Ted and Sarah Wanthal  
Douglas and Katherine White  
Marilyn and Earl R. Williams  
*Jim and Adele Wingate*

\* denotes new member in 2017  
*italics denotes deceased in 2017*



To help us manage continued growth, our latest Board-led strategic plan set intentional values for the Foundation. The Community Foundation commits to being:

- **Representative** of citizens in the community to give and serve for the common good of the community.
- **Responsive** as a community convener around issues and needs of Delaware County.
- **Relevant** to the understanding of, importance of, and involvement in charitable giving to the community.

Our Foundation and Board of Directors have always lived by these values. Putting them in writing allows the community to hold us accountable while supporting our efforts.

The Board of Directors of The Community Foundation is made up of individuals who live in Delaware County. They are passionate about this community today and in the future. They are tasked with making decisions that protect the gifts that make up our endowment. Each year, they review market returns and projections to set a spending policy for grantmaking. For 2017, they kept that policy at four-and-a-half percent. This rate provides quality grantmaking in the community, while allowing the funds to grow.

The Foundation also has more than 30 volunteers, who live or work in Delaware County. They make up our investment, finance, grants, and scholarship committees.

## NEW FUNDS

- Christian Student Foundation Legacy Fund
- Delaware County Historical Society Fund
- Eden Church Fund
- Lathrop P. Johnson Scholarship Fund
- Michael and Nicole Lunsford Charitable Fund
- Kenneth R. and Glenda D. Miller Scholarship Fund
- Muncie Skate Park Fund
- Jerry and Nanette Rushton First Presbyterian Church Fund
- Shafer Leadership Academy Fund
- Sigma Phi Epsilon, Indiana Gamma Charities Endowment Fund
- Nancy J. Smith Fund
- Soup Kitchen of Muncie Fund
- YMCA of Muncie Fund
- YMCA of Muncie Camp Crosley Fund



Former educator and Foundation supporter, Gary Addison talks about the importance of Bell Grants during the Bell Grant Birthday Party, a celebration that wrapped up the program's 25th year.

# OUR PROMISE TO THE ENTIRE COUNTY



As the Community Foundation of Muncie and Delaware County, we make an effort to improve the quality of life of residents in the city and in the small towns alike. The Town Endowment program provides grants to nonprofit organizations benefiting the people of Gaston, Selma, and Yorktown.

Like each town has its own character, each town endowment fund has a unique story about how it was established. The Gaston Town Endowment Fund was established by an anonymous donor who wanted to do something special for the community. Selma area residents used the Acorn program to establish the Liberty Perry Selma Town Endowment Fund. A grassroots fundraising effort for many \$5, \$10, and \$20 gifts made the fund a reality. The Town of Yorktown Endowment Fund was established by a community leader and left to grow. Community members revitalized fundraising efforts years later to increase the fund's ability to make grants.

Grant applications are reviewed by committees of local residents. Recommendations from these committees are approved by the Board of Directors of The Community Foundation.

## GASTON TOWN ENDOWMENT FUND GRANTS

|                                    |         |
|------------------------------------|---------|
| Wes-Del Community Schools          | \$1,300 |
| Wes-Del Youth Athletic Association | \$1,300 |

## LIBERTY PERRY SELMA TOWN ENDOWMENT FUND GRANTS

|  |       |
|--|-------|
| Liberty Township Volunteer Fire Dept. Inc. | \$500 |
|--|-------|

## TOWN OF YORKTOWN ENDOWMENT FUND GRANTS

|  |         |
|--|---------|
| Delaware County BY5 Early Childhood Initiative, Inc. | \$2,500 |
| Yorktown Council for the Arts                        | \$500   |

The Gaston Town Endowment Fund provided Wes-Del Community Schools a grant of \$1,300 to support their new preschool. The preschool used the dollars to purchase a copier and outdoor play equipment, such as a water table.

Between community-connected volunteers and Foundation staff, it's rare to attend a community event without Foundation representation. To keep a pulse on what is going on, we take part in a variety of task forces, boards, and committees. We attend workshops, events, and trainings. We work with community foundation peers from around the state to share best practices. We are compliant with the National Standards from the Council on Foundations.

In order to be responsive to the community needs The Community Foundation was started with just one fund, The Unrestricted Fund of The Community Foundation. Gifts to this fund, or any of our 40 named unrestricted funds, give the Foundation the most flexibility to respond to ever-changing community needs. Today, the Foundation manages more than 300 funds with specific purposes or designations. Unrestricted and field-of-interest funds support our competitive grants program. This year we awarded grants of \$1 million to 46 organizations.

Even at \$1 million, our Quarterly Competitive Grants Committee had to say no more than they said yes. Through the competitive process alone we had more than \$2.1 million in requests. Donors can help us reduce this gap through unrestricted gifts to the Foundation. Continued support is the promise we have asked for from the community.

We are also working to reduce this gap by building better relationships with local nonprofit organizations. Training opportunities and public meetings have opened communication with grantees and created transparency of our processes.

Regular meetings for organizations with endowments provided professional development and networking. This year we added a meeting that was open to any nonprofit organization in the community. The topic of the first meeting of this kind was "How to Partner with The Community Foundation." Representatives of 48 organizations attended to learn about the Foundation and its programs.



## OUR PROMISE FOR THE HIGHEST STANDARDS

The Community Foundation of Muncie and Delaware County complies with the Council on Foundation's National Standards for U.S. Community Foundations<sup>®</sup>, an accreditation by community foundations for community foundations. Accreditation includes an inventory of policies and procedures to ensure operationally and legally sound practices and a peer-review of documentation. Accreditation is reconfirmed annually. With confidence that we are operating at the highest standard, we can innovate to make an impact in our community.

# Our promise to meet current community needs

Competitive grants are awarded quarterly to nonprofit organizations serving Delaware County. In 2017 our Competitive Grants Committee reviewed more than 2,200 pages of grant applications and recommended \$1,007,759 in grants to 46 organizations.

Competitive grants are made in the areas of arts and culture, community betterment, economic development, education, and human services.

## Competitive Grants

|   |           |  |          |
|---|-----------|--|----------|
| A Better Way Services, Inc.                               | \$50,000  | East Central Indiana Chamber Orchestra           | \$2,000  |
| Alliance for Strategic Growth, Inc.                       | \$20,000  | East Central Indiana Regional Partnership        | \$15,000 |
| Back To School Teachers Store, Inc.                       | \$14,281  | Eaton Public Library, Inc.                       | \$4,559  |
| Big Brothers/Big Sisters                                  | \$10,000  | The Facing Project                               | \$14,000 |
| Boys and Girls Club of Muncie                             | \$17,000  | Habitat for Humanity                             | \$50,000 |
| Bridges Community Services Inc.                           | \$13,700  | Hillcroft Services, Inc.                         | \$75,000 |
| Ball State University Department of Technology            | \$6,000   | Home Savers of Delaware County                   | \$50,000 |
| Buley Community Center                                    | \$15,000  | Inside Out Community Development Corporation     | \$8,075  |
| AIM Summer Program  | \$40,000  | Lifestream Services, Inc.                        | \$5,000  |
| Cancer Services of East Central Indiana - Little Red Door | \$10,000  | Masterworks Chorale                              | \$4,500  |
| Cardinal Greenway   | \$32,000  | Motivate Our Minds, Inc.                         | \$20,000 |
| CFMD Signature Programs                                   | \$23,500  | Muncie Action Plan                               | \$15,000 |
| Christian Ministries of Delaware County                   | \$9,000   | Muncie Arts and Culture Council, Inc.            | \$27,450 |
| College Mentors for Kids! Inc.                            | \$5,000   | Muncie Civic Theatre Association                 | \$75,000 |
| Cornerstone Center for the Arts                           | \$20,000  | Muncie Innovation Connector                      | \$4,000  |
| The Delaware County CASA Program                          | \$19,480  | Muncie Symphony Orchestra                        | \$6,000  |
| Delaware County Historical Society, Inc.                  | \$5,000   | Muncie Three Trails Music Series                 | \$5,000  |
| Delaware Advancement Corporation                          | \$100,000 | Project Leadership Delaware County               | \$15,000 |
|   |           | Second Harvest Food Bank of East Central Indiana | \$20,000 |
|   |           | Shafer Leadership Academy                        | \$14,850 |
|   |           | TeenWorks  | \$25,000 |
|   |           | Town of Gaston                                   | \$18,000 |
|   |           | TRC Muncie Headstart                             | \$20,000 |
|   |           | United Day Care Center                           | \$5,638  |
|   |           | WIPB-TV  | \$3,000  |
|   |           | Women in Business Unlimited, Inc.                | \$3,000  |
|   |           | Youth Opportunity Center                         | \$68,726 |
|   |           | Youth Symphony Orchestra                         | \$4,000  |
|   |           | YWCA   | \$20,000 |

We are helping organizations help themselves. Donor support allowed us to bring The Fundraising School from The Indiana University Lilly Family School of Philanthropy to Muncie to present Developing Annual Sustainability. Organizations with endowments were invited to send a representative to attend the two-day course that was provided at no cost. Representatives of 23 organizations participated in the class. They received fundraising education, skills, and resources. We have hosted similar courses in the past and hope to bring more classes in the future.

## OUR PROMISE TO TEACHERS

In 1992, the Foundation created the Robert P. Bell Education Grants Program to honor former board member and life-long educator Dr. Robert Bell. These \$50 - \$450 grants are available to Delaware County teachers and counselors for creative and innovative classroom projects.

In Nancy Zachary's kindergarten class at North View Elementary School, budding scientists studied the seasons with the support of a \$378 Robert P. Bell Education Grant.

"Overall, the "Seasoned Scientists" project was a great success!" said Ms. Zachary. "The students became engaged by using tools and instruments like true scientists. You have helped to further science exploration at North View! I am very humbled by the acceptance of my Bell Grant request, and I am very thankful for the generosity of The Community Foundation."

### ROBERT P. BELL EDUCATION GRANTS

|                                       |         |
|---------------------------------------|---------|
| Burriss Laboratory School             | \$696   |
| Cowan Community School Corporation    | \$810   |
| Delaware Community School Corporation | \$1,893 |
| Indiana Academy                       | \$2,795 |
| Liberty-Perry School Corporation      | \$450   |
| Muncie Community Schools              | \$1,716 |
| Yorktown Community Schools            | \$937   |



A student in Nancy Zachary's kindergarten class learns about the seasons with the support of a Robert P. Bell Education Grant.

We have responded to educational needs in our community, too. In late 2016, the Foundation established the Robert P. Bell Teacher Grant Fund. This fund supports the Robert P. Bell Education Grants Program. The program gives teachers continued access to grants for creative and innovative classroom projects. In August, we announced our plan to raise the fund balance to \$25,000 to celebrate 25 years of Bell Grants - a fundraising goal of \$15,000. Thanks to generous donors, including a \$10,000 match, we not only met our goal, but exceeded it by \$6,828.

Additionally, the Foundation administers the Lilly Endowment Community Scholarship in Delaware County. This year we celebrated 20 years of Lilly Scholars. Since the program began, more than 50 Delaware County High School students have received this prestigious award. These scholars received full tuition and fees to an Indiana school amounting to more than \$4 million collectively. This strategic initiative from Lilly Endowment is working to raise the level of education attainment in Indiana.

## OUR PROMISE TO STUDENTS

"We were beyond excited to learn our daughter, Emmy, would receive the Lilly Scholarship, but looking back four years later, we are so much more appreciative now than we were then," said Greg Rawson, father of Emmy Rawson, a 2014 Lilly Scholar. "This scholarship allowed Emmy to receive a degree in Biological Engineering which will serve her well her entire life. Beyond that, she was able to embrace the entire college experience without the financial pressures most college student's face." Emmy will graduate from Purdue University in 2018.

To support increased educational attainment in our own community, The Community Foundation was pleased to administer the Lilly Endowment Community Scholarship locally beginning in 1998 on behalf of Lilly Endowment and Independent Colleges of Indiana. Over the last 20 years, we have managed the program that has provided 60 Delaware County students with full-tuition, required fees and book stipends for four years at any public or private Indiana college or university.

The relationship with those students doesn't end with the scholarship announcement. We meet with Lilly scholars annually while they are working toward their degree to check-in and provide them with their book stipend. For ten years after graduation, Lilly scholars are required to complete a survey that highlights their career and professional achievements.

Some of our earliest Lilly Scholars have chosen to stay connected to us as volunteers and donors. Matt Henry (2003) served on the Lilly Endowment Community Scholarship Selection Committee. During the selection process, Matt read and evaluated applications from the top students in the county, met each applicant at a networking lunch, and worked with the committee to make a collective decision on which students to recommend for this prestigious award.

"Almost every single thing I have in my life at this point was jumpstarted by that scholarship," said Matt. "I feel tremendously indebted to it, and I want to do whatever I can to give back and help out."

The Lilly Endowment Community Scholarship is only one of 48 scholarships managed by the Foundation. Visit our website at [cfmdin.org/scholarships](http://cfmdin.org/scholarships) for a complete list of scholarship funds.

## Milestone Scholarships

### 1997 - 20 YEARS

Lilly Endowment Community Scholarship  
60 Scholarships  
More than \$4.5 Million

### 2002 - 15 YEARS

E.A. and E.E. Burgess Memorial Scholarship  
12 Scholarships \$19,800  
Jon Hunter Memorial Scholarship  
28 Scholarships \$38,400  
Kathleen Rozelle-Camplin Scholarship  
28 Scholarships \$27,300  
Wilfred Wingate Scholarship  
14 Scholarships \$28,700

### 2007 - 10 YEARS

Janice Page Hughes Scholarship  
11 Scholarships \$68,500  
Alice Miriam, Kitselman Scholarship  
9 Scholarships \$3,200  
Arthur D. and Josephine M. Robling Scholarship  
108 Scholarships \$119,100

### 2012 - 5 YEARS

Tom Devine Memorial Scholarship  
5 Scholarships \$7,000  
East Central Opportunities Scholarship  
4 Scholarships \$2,000  
Jenny Haskell Memorial Scholarship  
11 Scholarships \$5,500  
Dr. Albert O. Miller III Scholarship\*  
1 Scholarship \$500  
Robert L. Thompson Scholarship  
5 Scholarships \$3,675  
Owen H. Ramey Memorial Scholarship  
7 Scholarships \$8,000

### 2017 - NEW FUNDS

Lathrop P. Johnson Scholarship Fund  
Kenneth R. and Glenda D. Miller Scholarship Fund\*

\*Established using the Acorn Program

The Community Foundation has supported strategic community programs for most of its existence. The Foundation must stay relevant within Muncie and Delaware County. There have been changes in the community since 1985 and we have changed, too, making strategic decisions important.

One such decision led to impact for early childhood. Since 2013, BY5 has been a supporting organization of the Foundation. We have provided annual grant funding to the organization to promote early childhood education.



*Our promise to  
the next 30 years*

Several years ago, it became apparent that too many Delaware County children were not prepared to enter kindergarten. The resulting “readiness gap” can have serious consequences for the youth, their families, and the community. In 2013, the Foundation helped launch Delaware County BY5 Early Childhood Initiative.

As a supporting organization of The Community Foundation, the Foundation maintains a close relationship with and provides continued support to BY5.

“Between 85 and 90 percent of brain development occurs from birth to age 5,” explains Carrie Bale, executive director of BY5. “That’s where we need to make the greatest investment because that’s where we can have the greatest impact on the future.”

Today BY5, with their large network of donors and volunteers, is supporting efforts to increase the number of high-quality preschool spots available in Delaware County, educating parents regarding early brain development in children, and providing opportunities for learning across the community.

The results of these efforts won’t be seen for 20 or 30 years, but early indicators are positive. More children are accessing high-quality childcare and more Muncie children are kindergarten ready.

The Foundation is supporting other efforts for the future of this community, too. This year, a \$5,638 grant captured an Early Education Matching Grant (EEMG) from the state of more than \$100,000. The funds supported a collaborative effort to provide quality early childhood education and kindergarten readiness for at-risk children at United Day Care Center, Huffer Children’s Center, and BSU Child Study Center.

Additionally, in 2017, we launched our strategic grants program. This board initiated program examines the needs of the community on a wide scale quietly and intentionally and invites applications from nonprofits who are well poised to contribute to emerging solutions.

The focus of the strategic grants this year was prevention and education related to the community's opioid and meth crisis. The Community Foundation directed resources to three projects that will have an impact on this issue.

Pathstone Corporation received a grant to summarize a study on local meth-affected houses. The study, completed in 2016, includes a vast amount of data. Through the grant, the summary data will be available to the general public and organizations in an easy-to-understand format. Disseminating this information will ensure the results of the study are used effectively instead of collecting dust on a shelf.

A second grant was made to BY5. BY5 is working with the Youth Philanthropy Initiative of Indiana (YPII) to bring YPII's Raising Kind Kids curriculum to preschool programs across the county. Raising Kind Kids uses empathy and kindness to introduce philanthropy to preschoolers. Possessing strong social-emotional skills needed to cope with challenging life situations may prevent future drug use. "Super You: Make the World a Better Place" lessons help preschoolers identify as super heroes. It teaches them to use kindness to help others.

The third grant will use a professionally created video as a catalyst for community change relating to houses impacted by meth drug use. Pathstone Corporation was awarded a grant to commission a series of videos to be crafted while they rehabilitate a meth-infected home in the Muncie community.

## Strategic Grants

Delaware County BY5-Early Childhood Initiative, Inc.  
**\$10,000**

Delaware County BY5-Early Childhood Initiative, Inc.  
**\$50,000**

PathStone Corporation-Indiana  
**\$1,390**

PathStone Corporation-Indiana  
**\$30,250**

Young children play and learn during their preschool day. Access to high-quality preschool learning opportunities is one way to give kids the best possible chance to succeed in school.



The video will help expose common misconceptions, challenges, best practices, and the importance of housing rehabilitation for long term neighborhood stability in our community. Segments of the video will target specific audiences such as legislators, contractors, realtors, and neighborhood associations, but the complete video will be available to help educate all members of our community and people across the region, state, and perhaps the country.

In addition to our strategic initiatives, we recognize extraordinary nonprofit leadership. The David Sursa Leadership Award recognizes those who share qualities of the Foundation's founding president, David Sursa. This year's recipient was Pat Botts for his service to Greater Muncie, IN Habitat for Humanity. Former Foundation board chairs make up the selection committee. These outstanding leaders review nominations and select the recipient. This decision was intentional in order to keep valued leaders connected.

## OUR PROMISE TO ENCOURAGE LEADERS

This community is fortunate because it is full of strong leaders. The Foundation's strong beginnings were a result of its own strong leader, David Sursa. As founding president, Mr. Sursa blazed the trail for the Foundation. His visionary leadership contributed greatly to our early success and to the support we have been able to provide the community.

To honor Mr. Sursa, and to recognize extraordinary leadership in the community, the Foundation established the David Sursa Leadership Award. Since 2006, a committee comprised of the Foundation's previous board chairs along with Roni Johnson, the Foundation's first full-time president, review the nominations and make a selection. Serving on this committee is one way that these exemplary leaders stay connected to the Foundation and the work of nonprofit organizations in Delaware County.

This year, the committee selected Pat Botts as the recipient of the David Sursa Leadership Award to recognize his dedicated service to Greater Muncie, IN Habitat for Humanity. Over the years he served in leadership roles and on committees. He was an exemplary nominee because of his longevity, breadth of service, and his impact.

"Pat Botts has dedicated well over a decade of his life to Muncie Habitat for Humanity's Board of Directors!" wrote Habitat CEO, Lindsey Arthur. "Pat was recruited to join the Board of Directors in 2002 and from 'day one' gave it his all."




Foundation Board Chair Jeffrey R. Lang stands with Pat Botts, former Muncie Habitat for Humanity board member at a Habitat work site. Pat was nominated for the David Sursa Leadership Award because of his dedicated service to the organization. Muncie Habitat received a \$50,000 grant in 2017 to support their 2017 Housing Program which helped 25 families find housing solutions through new construction, rehabilitation, or home repairs.



The Foundation was awarded the Community Impact Award from the Muncie Delaware County Chamber of Commerce during the Chamber's 2017 annual meeting and awards event. Roni Johnson, former Foundation president; Jeffrey R. Lang, current board chair; Kelly K. Shrock, current president; Marcy Minton, senior program officer; and Steve Smith, former board chair accepted the award.

We don't stop there either. The Community Foundation looks for ways to support conversations and promote collaboration. Since the late 1990s, we have been part of the Funders Forum. This group of local funders meets to discuss community needs and learn from each other. This year, the Funders Forum decided to take part in collective grantmaking. The group pooled their resources and selected a common issue to support. The inaugural grant went to The Delaware County CASA Program. CASA launched an awareness campaign tied to the need for child advocates due to the opioid crisis in our community.

The Foundation looks different than it did 32 years ago. Our staff has grown, and so has our footprint. The numbers of volunteers, programs, and funds have all increased. Yet, our mission is still to improve the quality of life for the residents of Muncie and Delaware County. Our leadership continues to represent the community. We respond to community needs and as those needs change we are able to remain relevant. We are here to provide a permanent source of charitable assets for this community. That was our promise in 1985. Our promise remains - to be here for Muncie and Delaware County today, tomorrow, and always. 

# 2017 DONORS

A.E. Boyce Co., Inc.  
Margaret E. Adams  
Shawn Adams  
Daniel and Cathy Alexander  
Jay and Susan Allardt  
Joseph and Maraby Allardt  
Muncie Altrusa Foundation, Inc.  
Hazel Amos  
Stefan and Joan Anderson  
Anonymous (3)  
David and Toni Annis  
Monique R. Armstrong and  
John M. Makeni  
John and Janet Arnold  
Astrazeneca Pharmaceutical LP  
Leonard and Susan Atherton  
Charles and Joycelyn Baer  
David and Joan Bahlmann  
M. Saber and Lalbib Bahrami  
Nancy A. Baker  
Ted and Gail Baker  
Ball Brothers Foundation  
George & Frances  
Ball Foundation  
Earl and Martha Barb  
Linda Barb  
Lindsey Bard  
Nancy D. Barefoot  
Lynda Barlow  
Judith A. Barnes Estate  
Nikki K. Barnes  
Anna C. Barnhart  
J. Neal Barnum  
Jane E. Barrett  
Charles and D'Lee Bartholome  
Murray and Angela Bartholome  
Gary and Kathy Bartlett  
Dale E. Basham  
Barbara Bayless  
Daniel and Carolyn Beard  
Bob and Kim Beasley  
John and Kaye Beasley  
Samuel J. Beasley  
Waldo F. Beebe

Beech Grove Cemetery  
David and Mary Benbow  
Paul and Sandra Bender  
Judy Benken  
Daniel and Janet Benson  
Kenneth and Patricia Biller  
Jeffrey and Susan Bird  
Derron and Charity Bishop  
Dennis and Tanya Blair  
Michael R. Blake  
Jeremy Bolles  
Thomas and Lynne Borman  
Patrick and Jane Botts  
Zachery and Cara Bow  
Christina M. Bowles  
Andrew and Ruth Bowne  
Scot and Jo Boyce  
Bryan and Delaina Boyd  
William and Margee Bracken  
George and Linda Branam  
Kenneth and Peggy Briner  
Mark and Catherine Brinker  
Frank Brinkman Law PC  
Robert and Mary Brodhead  
Sally Brodhead  
Brittini Brown  
Michael and Lisa Brown  
Sherry L. Brown  
Tom and Nancy Browning  
Terry and Kristi Brumley  
Patricia Brunette  
William and Juanita Bruns  
Robert and Jayne Buchanan  
Schuyler and Mary Louise Buck  
Jack Buckles  
David and Elaine Burgauer  
Edward and Kathy Burgauer  
Michael and Katy Burke  
Jon and Karen Burkhardt  
Robert and Lydia Burton  
Lori Byers  
Jon and Martha Calloway  
Richard and Bonnie Calvin  
Alyssa B. Campbell  
Bruce A. Cantrell and  
Rick C. Cantrell  
Care Animal Hospital  
Marilyn Carey  
John and Nancy Carlson

Ann Carney  
David and Jama Carter  
Jeffrey and Connie Carter  
Reed Cheesman and  
Marjorie Towell-Cheesman  
Christian Student Foundation, Inc.  
Patricia Clark  
Dr. Thomas R. Clark  
Coldwell Banker Lunsford  
Eric Cole  
Richard and Cheryl Conroy  
Phillip and Carolyn Cooley  
Robert H. Cooper Estate  
Gordon and Pam Cox  
Larry and Connie Crabtree  
John and Pamela Craddock  
Bruce and Judy Craig  
James and Janice Craig  
Allie and Juanita Craycraft  
Marlin and Mary Ann Creasy  
James and Barbara Crookston  
Linn and Susan Crull  
Ted Cunliffe  
Curtis Cunningham  
Loyal and Floramae Cutforth  
Daleville Athletic Boosters  
William (Dick) and Jenny Daniel  
Michael and Marsha Daugherty  
James and Jill Davis  
Wil and Cynthia Davis  
James and Cheryl Decker  
Defur Voran  
Delaware Community  
School Corporation  
Delaware County Historical Society  
Delaware County Retired Teachers  
Delaware County Soil and Water  
Conservation District  
Ben and B.J. Delk  
Jason and Melissa Delk  
Jack and Patricia Demaree  
Ron and Ruby Denney  
Sylvia Y. Devault  
Lesley Devine  
John and Tracie Disher  
Cherilynn Dollison  
Cornelius and Mary Dollison  
Deborah L. Donovan  
Anthony R. Dowell MD

Jean Drumm  
Elizabeth J. Dudgeon  
Brian Dudley  
Donna Dye  
Eaton Public Library  
EBS Consulting Inc.  
Eden Church  
Richard and Margaret Edwards  
William and Barbara Eidson  
John and Anne Eliades  
Charles A. Elliott  
Sue Errington  
Mark and Molly Ervin  
Mary A. Essig  
James and Toni Estep  
Lance and Mary Jo Estep  
Tom and Linda Farris  
Edgar and Eralene Faulkner  
Ronald and Cheryl Fauquher  
Jeffrey and Susan Felton  
Joseph and Holly Fenech  
Dwight and Madelyn Ferris  
Irvin and Janet Ferwerda  
Nancy Fike  
First Merchants Private Wealth Advisors  
James and Elizabeth Fisher  
Jud and Carey Fisher  
Larry D. and Donna M. Fouch  
Shirley Freer  
Friends of BY5 Early Childhood Initiative  
Friends of Southside Spirit Scholarship  
Friends of Tom Devine Scholarship  
Ted and Constance Fullhart  
Amy Gackenheimer  
Jean Gadziola  
David and Nancy Galliher  
Michael and Catherine Galliher  
Ethel J. Gantz  
Thomas and Carol Gardiner  
James Garrett  
Paul and Vickie Garrison  
Robert and Lynn Gibson  
Marlene A. Girton  
David and Marcia Gobble  
Rex and Margaret Goen  
John and Diana Goes  
Barbara Gooden  
James and Martha Gooden  
Wayne and Linda Gray

Merrill and Linda Greene  
Keith Greenwalt and  
Marla Templeton  
Terrie Greenwalt  
Charles Greenwald  
Connie R. Gregory  
Della D. Gregory  
Linda S. Gregory  
Suzanne Gresham  
Michael and Carolyn Grieves  
Sara Gullion  
Habitat for Humanity  
Carolyn Halteman  
Jay and Cathleen Halteman  
David and Carol Hamilton  
Frederick M. Hamilton  
Hal and Rhoda Haney  
Linda K. Hanson  
William and Patricia Harper  
Bill Harris  
Gayle and Jeannine Harrold  
Mary E. Haskell  
Jeffrey and Kelly Heavilon  
David and Deb Heeter  
Fredric M. Hefter  
Patrick and Susan Helfrich  
Larry and Sandy Helms  
Jon and Janis Hendrix  
Madelyn Heskett  
Charles and Charlotte Hetrick  
Earl and Rosalie Hiatt  
Richard and Carrie Hill  
Monte and Kendra Hitchcock  
Richard and Shirley Hochstetler  
Joy L. Honn  
Honor Stride  
Hood Life Agency  
Charles and Barbara Houck  
Daniel and Mary House  
Aileen Howard  
Rupert and Rita Howell  
Karen Howells  
Jackie and Marchal Hudson  
William and Roseanne Hughes  
Anthony Hunt  
William and Virginia Hunter  
John and Patricia Huse  
Greg Icenogle  
Independent Colleges of Indiana

Indiana Philanthropy Alliance  
Foundation  
Indiana Public Broadcasting  
Stations, Inc.  
Indiana Trust & Investment  
Management Company  
Mitchell and Rebecca Isaacs  
Jack and Wanda Isenbarger  
Cedric and Marsha Johnson  
Alan and Betty Johnson  
Dorothy A. Johnson  
Gordon C. Johnson  
James and Reva Johnson  
Patrick and Doreen Johnson  
Roni Johnson  
Matthew and Tonya Johnston  
Michael and Jackie Johnston  
Paul Judy  
James and Norma Juett  
KAKATU Foundation  
Kappa Kappa Kappa  
Gamma Associate Chapter  
Dodd Kattman  
Rhonda S. Kaylor  
Stanley Keil  
James and Velura Kellner  
Eric and Sandra Kelly  
John and Marcia Kelly  
Betty Kendall  
Martha Kendrick  
Patricia Kennedy  
Michael and Eleanor Keppler  
Martha E. Kersey  
Robert Kersey  
Jeffrey and Ruth Kiger  
Jo Kincaid  
Darrell and Sheila King  
James and Shirley King  
Thomas and Nancee Kinghorn  
Kirby Avenue Church of God  
Thomas and Anita Kishel  
Errol and Pat Klem  
Charles and Christine Kneese  
Kirby and Kristi Koriath  
Barbara Koshkarian  
John A. Koumoulides  
Chad Kowalski  
Emily Lamb

Robert and Donna Lamp  
David and Susanna Land  
Jeffrey R. and Beth Lang  
Lory Lee  
Amy N. Leffingwell  
Susan Leffler  
Thomas and Elizabeth Leonard  
Dale and Teresa Lindley  
John and Katherine Littler  
Charles and Linda Loker  
Colleen S. Love  
Laurie A. Lunsford  
Mike and Nicci Lunsford  
Meryl E. Mantione  
Maplewood Animal Hospital  
Amber Marcum  
John and Jennifer Marsh  
Dan and Marianne Marshall  
Mary J. Mason  
Donald and Terri Matchett  
Donald L. Mays and Kelly McCray  
Mark McClinchie  
Michael and Elizabeth McClinchie  
Thomas and Carol McComish  
Sarah McCord  
William and Janet McCune  
Jane McDowell  
Larry and Robin McGill  
Richard and Joan McKee  
Meeks Mortuary, Inc.  
Beatrice J. Mertens  
Harry and Rosalie Metzger  
Malcolm and Ann Metzler  
Fred A. Meyer Jr.  
Donald and Carolann Mikesell  
Hank and Terri Milius  
Nancy H. Millard  
Albert Miller  
Ann L. Miller  
Carrie Jo Miller  
Chris and Betsy Miller  
John and Grace Miller  
Keith and Elaine Miller  
Roger Miller  
Minnetrasta  
Jason and Marcy Minton  
James E. Mitchell  
Jon and Barbara Moll

Paul and Deb Monacelli  
Ralph and Pat Montgomery  
E. Bruce and Sandy Moore  
Richard and Patricia Moore  
Courtland and Jill Moores  
Edward and Dolores Moran  
Mark and Mary Mordue  
Todd M. Mostrog  
Sarah Muhlenkamp  
Muncie Alumnae Club of  
Pi Beta Phi Sorority  
Muncie Arts and Culture Council, Inc.  
Muncie Central High School  
Class of 1952  
Steven and Lisa Murphy  
Murray's Jewelers  
MutualBank Charitable Foundation, Inc.  
Rick and Eva Muzzy  
Gregory and Mary Myers  
Ronald and Susan Naylor  
James and Linda Needham  
Harold and Linda Nelson  
Joan Nelson  
Berneida A. Nixon  
Normandy Flower Shop  
Emilie Norris  
Colin Nowling  
James O'Day  
Donald E. Odle  
John and Margo Oesterle  
Judith I. Oetinger  
Old National Bank  
Oren and Mary Ann Olinger  
Keith and Betty Orebaugh  
Brian and Melissa Osner  
Don and Claire Park  
Paul and Stacia Partezana  
Geraldyn Pasi  
Paws, Inc.  
Wayne and Ruth Payne  
Jerry and Jan Peirson  
Jensen and Bianca Person  
Charles K. Persinger  
Virginia Peterson  
Oswald and Adelaide Petrucco  
Phi Upsilon Omicron  
Luke and Dianne Philippsen  
David and Tamara Phillips  
Karen Pilkington

William Pingry  
Donna Polcz  
John and Janice Powers  
Julie Powers  
Joe and Sue Prokos  
Judi Putt  
James and Elisabeth Pyle  
David and Rebecca Readle  
Michael and Debra Rechin  
Charles and Jackie Rector  
Thomas and Becky Rector  
Steve and Amy Reed  
Gabriel and Susanne Reising  
Linda Rent  
Daniel and Sherry Ridenour  
Nancy Riegle  
Sherry Riggan  
Paul and Fidelia Risk  
R. Donn and Freida Roberts  
Michael and Patricia Rodbro  
Judith Roepke  
Anthony and Sue Ann  
Romanovich  
Mary Rose  
Jerall and Joan Ross  
L. David and Ann Marie Ross  
Rotary Club of Muncie  
Max and Barb Rudicel  
Jerry and Nanette Rushton  
Thomas Michael and  
Catherine Ann Ryan  
S.A. Boyce Corporation  
Sam Pierce Chevrolet, Inc.  
Robert and Anna Sammelson  
Marilyn Scales  
Patricia Schaefer  
Dale and Judith Schell  
Joe Scherrer  
Joel and Rebecca Scherrer  
James and Cathy Schrecongost  
Carol E. Seals  
Sandra Bottoms-Seals  
Sally Secor  
Jo Seidel  
Peggy Selvey  
Hamer D. and Phyllis C.  
Shafer Foundation  
Francis and Tracy Shafer  
Timothy and Toni Shattuck

Kerry and Donna Shaw  
Sherfy Scholarship Golf Outing  
Donald Shondell  
Harry Shrieve  
Kelly and Joel Shrock  
Kent Shuff and Steve Fennimore  
Larry R. Shultz  
George and Carol Lee Shumar  
Lori L. Siefker  
Sigma Phi Epsilon,  
Indiana Gamma Chapter  
W. Alan and Julie Simmons  
George and Mary Sissel  
Marvin and JoAnn Sites  
William and Julie Skinner  
Charles and Cindy Slavin  
Jerry and Judy Sloan  
Van and Margaret Smith  
Greg and Sandra Smith  
Jeffery Smith  
John Smith  
Kevin and Jennifer Smith  
Leslie H. Smith  
Michael Smith and  
Ann Deitchman-Smith  
Nancy J. Smith  
Neal A. Smith  
Steven and Barbara Smith  
Thomas and Pamela Smith  
Robert and Marilyn Smitson  
Brigitta Snider  
Larry and Jeanine Souders  
Genet Soule  
Soup Kitchen of Muncie  
William and Isabelle Sowers  
William and Sandra Spatta  
Carolyn Spence  
Elizabeth Spieth  
Julianna Springer  
Joanne Spurgeon  
Gordon and Susan Stagge  
Daniel and Lynne Stallings  
Kelly and Donna Stanley  
Michael and N. Deborah Stapler  
Staples Foundation for  
Learning, Inc.  
Donald and Ramona Stetson  
Daniel and Catharine Stewart  
James and Gail Stewart

M. Kay Stickle  
Storer Elementary School PTO  
Robert and Janet Stratton  
Colton C. Strawser  
Alex and Kallie Sulanke  
Charles and Claudia Sursa  
Mary Jane Sursa  
Joseph and Jolena Sutherland  
Raymond R. Taylor  
Scott and Lisa Taylor  
Carol Sue Templin  
Terry L. Terrell  
Allan and Carolyn Thomas  
Charles and Jane Thomas  
Gary and Amy Thomas  
Larry and Jo Ann Thomas  
Michael Thomas  
Wayne and Carolyn Thomas  
Dennis and Melinda Thompson  
Don and Sharon Thompson  
Yvonne Thompson  
Michael and Ruth Ann Tolle  
Helen L. Towne  
Joseph and Carol Trimmer  
Gale and Deirdre Tschuor  
Robert and Julie Tyler  
Robert and Suzanne Tyner  
Marian S. Ullrich  
United Health Group  
United Way of Delaware County  
James and Munjot Updike  
Warren and Joy Vander Hill  
Harry Vernon and Anita Martin  
Wade and Lucretia VonKleeck  
Skip and Marianne Vorhees  
Peter and Franky Voss  
Terry and Cheryl Walker  
Wayne County Foundation  
Karen Wenger  
Larry and Lona Wesley  
Donald and Sue Whitaker  
Douglas and Katherine White  
Jon and Jatonya White  
Whitinger & Company  
Ronald and Eunice Whitlock  
J. Frederic Wiese and  
Elizabeth Bracken Wiese  
Doris Jane Wiley  
Lawrence and Judith Williams

Mark and Brenda Williamson  
Bonnie J. Willy  
Derek Wilson  
Frank W. Wilson Jr.  
James and Pamela Wingate  
Donald and Deborah Winkle  
John and Sandra Worthen  
Michael D. Wysong  
YMCA of Muncie  
DeVon Yoho  
Marjorie Zeigler  
Richard and Jeanne Zeigler  
Jay and Phyllis Zimmerman

2017

## MEMORIALS

Sarah E. Adams  
Tiny Adams  
Dr. Daryl Adrian  
Rosalie Adrian  
Michael Alexander  
Donald Gene Applegate  
Judith M. Barnes  
Donald Bartlett  
Larry Bassett  
Margaret Bell  
Joann Boltz  
Alice Bono  
Lee A. Bourne  
Alexander and Rosemary Bracken  
Homer J. Bradburn, Jr.  
Muriel Braun  
Lucy Bright  
Alyx Brinkman  
Patricia Brinkman  
Doris M. Britton  
Mr. Michael Brodhead  
Jane Buckles  
Ashley Burgauer  
Jenny Burgess  
Richard and Dorothy Burkhardt  
Phyllis Bush  
Claude E. Carter  
Mary Jo Clark  
Philip N. Clark  
Michael A. Clawson

Adam Cline  
Jerry V. Cole  
Michael L. Cox  
Alex Cullum  
Mike Davis  
Rodney Davis  
Donald Day  
Ralph Dennis  
Tom Devine  
Larry Dollison, Sr.  
Bill Ellington  
Tom Eulitt  
Taylor Family  
Dubie Fennimore  
WH (Dub) Fike  
Sue Fish  
John and Janice Fisher  
Betty R. Freeman  
Carolyn Goforth  
Gloria Ann Gooden  
Terry Gordon  
Mike Grandison  
Zach Greenwalt  
Charles Greenwood  
Howard Gregory  
Julian Gresham  
Sue Ann Harris  
Jenny Haskell  
Tony Haughn  
Kermit Hays  
John F. Hazelton, Jr.  
Stanley E. Hiatt  
Greg Hill  
Michele Barnhart Hires  
Sarah Marie Holderman  
Ben Howells  
Jon Hunter  
Farrell and June Jackson  
Nancy Janney  
Katie Lee Jernigan  
Bertha Fay Bayer Johnson  
Charles Wm. Johnson  
Clementine Johnson  
E.K. Keesling  
Monte Keesling  
Kathleen Keil  
Virginia Kellems  
Sheila Kelley  
Ralph Kennedy

Mr. and Mrs. Dick Kishel  
Muriel Kishel  
Carl Kizer, Sr.  
Nancy Koons  
Anastasios and Sophia  
Koumoulides  
Dorothy Lacy  
Jim Lambert  
Jim Leffler  
Bob and Janet Lewis  
Joyce Lewis  
Leah Lowe  
Norma T. MacKenzie  
Lesta McClain  
James McClellan  
Raymond E. McCord  
Kay McCormick  
Glenda D. Miller  
June E. Miller  
J. Paul Mitchell  
Pat Moore  
Andy Munson  
Jack Munson  
Katherine T. Onieal  
D.C. Osborn  
Jill Pickart  
Sandra Pippen  
Joseph I. Pippenger  
Gyorgy Polcz  
E. John Pole  
Paul C. Powers  
Bill Putt  
Diane Reed  
Mary A. Reed  
Al Rent  
Leroy Rhea  
Melanie Riggin  
Jeffrey S. Ross  
Frances P. Sargent  
Monty Scamihorn  
Martin D. Schwartz  
James Theodore "Ted" Scott  
Charles Secor  
John Shelton  
Betty Shondell  
Dixie Smith  
Jeanne E. Smith  
Diane Osborn Speidel  
Jack M. Stanton

Tové Stimson  
David Sursa  
Lois Tharp  
Pauline Thompson-Shaw  
Ralph W. Thorpe  
Robert Trapp  
Eileen Walters  
Rollin E. Ward  
Jim Wilhoite  
Ben Grady Williams  
Joseph E. Wilson  
Adele Wingate  
Dena Woodgett  
  
Pet: Lady

## 2017 IN HONOR

Shawn Adams  
Julius Anderson  
Verna Bartlett  
Lonita Bassett  
Pastor Jim and Debbie Behrendt  
Steve Bell  
Jean R. Blake  
William Bruns  
Jack Buckles  
Olga Butler  
Ann Carney  
Oliva Maria Copeland  
John Craddock  
David and Laura Crampton  
Greg Cross  
Mary Jo Crutcher  
Ben and Elizabeth Delk  
Joseph and Jennifer DePew  
Mary Dollison  
Stephen Driscoll  
Linda Farris  
Bill and Vicki Gaddis  
James and Martha Gooden  
Keith Greenwalt  
Linda S. Gregory  
Suzanne Gresham  
Karen Harrold  
Mary E. Haskell

Gary Heller  
Karen Howells  
Marchal Hudson  
Candance (Candy) Ingle  
Jennifer Johnson  
Dr. and Mrs. J. Martin Johnson  
and Family  
Jackie Johnston  
Michelle Kaitchuck  
Jo Kincaid  
John A. Koumoulides  
Susan Leffler  
Dr. Vasilis Makris, MD; FACS  
Jenni Marsh  
Jane McDowell  
Geoffrey and Jennifer Mearns  
Dlynn Melo  
Kenneth and Beverly Miller  
James E. Mitchell  
Joe Mook  
Judy Oakerson  
John and Michelle Reimers  
Carol E. Seals  
Sara Shade  
John W. and Janet L. Sharp  
Kent Shuff and Steve Fennimore  
Kim and Randy Slape  
John Smith  
Kevin and Jennifer Smith  
Pat and Laura Smith  
Van and Margaret Smith  
Casey Stanley  
Kelly and Donna Stanley  
Charles and Claudia Sursa  
Mary Jane Sursa  
Carol Sue Templin  
Carol Trimmer  
Bonnie Turner  
Marianne Vorhees  
Jennifer Walton  
Karen Wenger  
Donald and Sue Whitaker  
Douglas and Katherine White  
Eunice Whitlock  
Michael and Laura Williamson  
Richard and Mary Anne Wilson  
Ivan and Jean Wright

# FINANCIAL INFORMATION

The audited financial statements are available on our website at [cfmdin.org](http://cfmdin.org)

## CONSOLIDATED STATEMENT OF FINANCIAL POSITION\*

December 31, 2017 and 2016

### SCHEDULE OF ASSET AND STYLE ALLOCATION



- US Large Cap **31.7%**
- US Mid Cap **2.8%**
- US Small Cap **6.2%**
- International Equity **13.9%**
- Emerging Markets **4.1%**
- Hedge Fund **17.6%**
- Private Equity **8.2%**
- Fixed Income **12.8%**
- Master Limited Partnerships (MLP) **2.7%**

The Community Foundation of Muncie & Delaware County, Inc., uses Fund Evaluation Group, LLC (FEG) as its investment consultant. FEG provides a complete range of traditional institutional consulting services including investment policy development, portfolio design, asset allocation, manager search and selection, investment manager monitoring, plan monitoring and education for board members and staff.

### ASSETS

|  | 2017          | 2016          |
|--|---------------|---------------|
| Cash and cash equivalents              | \$ 2,311,658  | \$ 1,950,979  |
| Investments                            | 57,721,421    | 52,209,122    |
| Prepaid expenses                       | 1,450         | 1,450         |
| Pledges receivable                     | 7,375         | 10,000        |
| Property and equipment, net            | 23,162        | 13,372        |
| Cash surrender value of life insurance | 598,314       | 585,284       |
|  | \$ 60,663,380 | \$ 54,770,207 |

### LIABILITIES

|                                      |              |              |
|--------------------------------------|--------------|--------------|
| Grants payable                       | \$ 166,200   | \$ 305,100   |
| Administrative expenses payable      | 767          | 12,454       |
| Funds held for the benefit of others | 5,856,324    | 5,193,794    |
| Investments managed for others       | 596,362      | 552,502      |
| Annuity obligations payable          | 4,642        | 4,866        |
|                                      | \$ 6,624,295 | \$ 6,068,716 |

### NET ASSETS

|                                 |               |               |
|---------------------------------|---------------|---------------|
| Unrestricted                    | \$ 160,358    | \$ 253,655    |
| Unrestricted - board designated | 21,287,530    | 18,928,117    |
|                                 | 21,447,888    | 19,181,772    |
| Temporarily restricted          | 8,719,448     | 6,029,685     |
| Permanently restricted          | 23,871,749    | 23,490,034    |
|                                 | \$ 60,663,380 | \$ 54,770,207 |

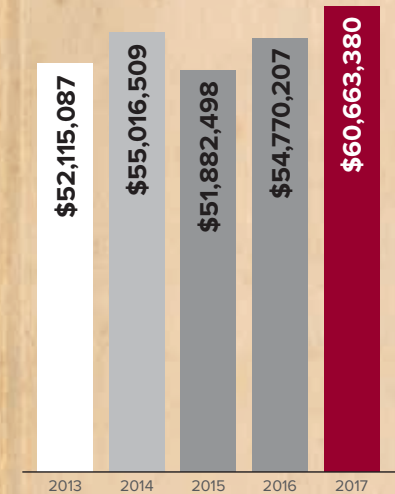
\*Consolidated with Delaware County BY5 Early Childhood Initiative, Inc.

## CONSOLIDATED STATEMENT OF ACTIVITIES\*

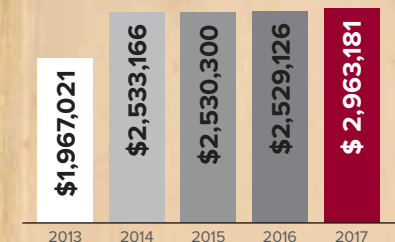
For the years ended December 31, 2017 and 2016

| REVENUE, GAINS,<br>AND OTHER SUPPORT      | UNRESTRICTED        | TEMPORARILY<br>RESTRICTED | PERMANENTLY<br>RESTRICTED | 2017<br>TOTALS      | 2016<br>TOTALS       |
|---|---------------------|---------------------------|---------------------------|---------------------|----------------------|
| Contributions                             | \$ 113,494          | \$ 670,330                | \$ 381,715                | \$ 1,165,539        | \$ 2,518,375         |
| Contributions - BY5                       | 6,512               |                           |                           | 6,512               | 6,512                |
| Investment income                         | 522,884             | 688,656                   |                           | 1,211,540           | 1,455,982            |
| Net realized gain on sales of investments | 498,485             | 641,145                   |                           | 1,139,630           | 775,114              |
| Net unrealized gain (loss) on investments | 2,216,676           | 2,857,757                 |                           | 5,074,433           | 1,062,673            |
| Administrative fee revenue                | 524,635             |                           |                           | 524,635             | 485,975              |
| Total Revenue, Gains, and Other Support   | <u>\$ 3,882,686</u> | <u>\$ 4,857,888</u>       | <u>\$ 381,715</u>         | <u>\$ 9,122,289</u> | <u>\$ 6,294,631</u>  |
| Net Assets Released from Restrictions     | 2,168,125           | (2,168,125)               |                           |                     |                      |
|   | <u>\$ 6,050,811</u> | <u>\$ 2,689,763</u>       | <u>\$ 381,715</u>         | <u>\$ 9,122,289</u> | <u>\$ 6,294,631</u>  |
| <b>EXPENSES</b>                           |                     |                           |                           |                     |                      |
| Program services                          | \$ 2,547,641        |                           |                           | \$ 2,547,641        | \$ 2,069,228         |
| Program services - BY5                    | 97,113              |                           |                           | 97,113              | 56,105               |
| Management and general expenses           | 793,285             |                           |                           | 793,285             | 963,038              |
| Management and general expenses - BY5     | 138,706             |                           |                           | 138,706             | 197,763              |
| Investment expenses                       | 78,880              |                           |                           | 78,880              | 80,038               |
| Fundraising expenses                      | 108,383             |                           |                           | 108,383             | 90,595               |
| Fundraising expenses - BY5                | 20,687              |                           |                           | 20,687              | 18,124               |
| Total Expenses                            | <u>\$ 3,784,695</u> |                           |                           | <u>\$ 3,784,695</u> | <u>\$ 3,474,891</u>  |
| <b>CHANGE IN NET ASSETS</b>               | <u>\$ 2,266,116</u> | <u>\$ 2,689,763</u>       | <u>\$ 381,715</u>         | <u>\$ 5,337,594</u> | <u>\$ 2,819,740</u>  |
| <b>NET ASSETS AT BEGINNING OF YEAR</b>    | 19,181,772          | 6,029,685                 | 23,490,034                | 48,701,491          | 45,881,751           |
| <b>NET ASSETS AT END OF YEAR</b>          | <u>\$21,447,888</u> | <u>\$ 8,719,448</u>       | <u>\$ 23,871,749</u>      | <u>\$54,039,085</u> | <u>\$ 48,701,491</u> |

### HISTORY OF ASSETS



### HISTORY OF GRANTS\*



\*represents the total grant distribution from all funds of the Foundation

# 2017 Board of Directors



**Jeffrey R. Lang**  
Chair  
At-Large Representative  
*Retired,  
Ball State University  
Foundation*



**Carol E. Seals**  
Vice Chair

Financial Services

*CFO,  
Ball Associates*



**Linda Gregory**  
Secretary

At-Large Representative

*City Council Member,  
City of Muncie*



**Michael B. Galliher**  
Treasurer

At-Large Representative

*President & CEO,  
A.E. Boyce Systems*



**Marianne Vorhees**  
Ex Officio

Health & Human Services

*Judge, Delaware  
Circuit Court No. 1*



**Trent Dowling**

At-Large Representative

*Senior Vice President of  
Commercial Lending,  
Star Financial Bank*



**Ermalene M. Faulkner**

Education

*Retired,  
Muncie Community Schools*



**Gary Thomas**

Business

*Partner &  
President,  
LEAP Managed IT*



**Kathy White**

Professional Services

*CFO,  
Muncie Power  
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**Leland C. Wilhoite**

Arts, Culture & Recreation

*DDS, Wilhoite  
Family Dentistry*

# Committees and Advisors

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Michael B. Galliher  
Linda S. Gregory  
Carol E. Seals

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Ronald K. Fauquher  
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Carol E. Seals

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David W. Heeter  
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John D. Littler  
Chris Miller  
Casey Stanley

## COMPETITIVE GRANTS COMMITTEE

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Chris Fancher  
Ermalene Faulkner  
Jaime Faulkner  
Molly Flodder  
Keith Gary  
Linda Gregory  
Jon Moll  
Gary Thomas  
Marianne Vorhees  
Leland Wilhoite  
Betty Wingrove

## STRATEGIC GRANTS COMMITTEE

Jeffrey R. Lang  
Marianne Vorhees  
Kathy White

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Christy Bilby  
Bonnie Coffman  
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Jennifer Jessie  
Joan McKinley  
Jacki McKinney  
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Jeri Owens  
Jennifer Robinson  
Candace Smithson

## GASTON TOWN ENDOWMENT COMMITTEE

Trent Dowling  
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Brandon Petro  
Tracy Shafer  
James Wormer

## LAND CONSERVATION COMMITTEE

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Sue Errington  
Sara Shade  
Lee Smith  
John Taylor

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Larry Crabtree  
Heath Dudley  
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Libby Richie

## LILLY SCHOLARSHIP COMMITTEE

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John Disher  
Ryan Groves  
Matt Henry  
Amy C. Thomas  
Dennis Trammell  
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## SCHOLARSHIP COMMITTEE A

Terry Whitt Bailey  
Keith Doudt  
Jaime Faulkner

## SCHOLARSHIP COMMITTEE B

Derron Bishop  
Connie Gregory  
Fred Meyer

## SCHOLARSHIP COMMITTEE C

Aileen Howard  
Rena Mayes  
Nick Tokar

## TOWN OF YORKTOWN ENDOWMENT COMMITTEE

Michael Burke  
Patti Decker  
Rich Lee  
Starr Manning  
Sarah McCord

*All committee lists represent those serving beginning June 2017.*

## CHAIRMAN EMERITUS

Stefan S. Anderson  
Jack E. Buckles  
Wilbur R. Davis  
Mark A. Ervin  
Ronald K. Fauquher  
Suzanne Gresham  
John D. Littler  
Steven M. Smith  
Charles V. Sursa

## PRESIDENT EMERITUS

Roni Johnson

## IN MEMORIAM

Edmund F. Ball  
Oliver C. Bumb  
David Sursa  
Earl R. Williams

# Strategic Plan

## VALUES

**Representative:** The Community Foundation values the ability of all citizens in Muncie and Delaware County to give and serve for the common good of the community.

**Responsive:** The Community Foundation values its ability to serve as a community convener around issues and needs of Delaware County.

**Relevant:** The Community Foundation values the understanding of, importance of, and involvement in charitable giving to the people of Muncie and Delaware County.

## STRATEGIC DIRECTIVES

### Asset Development

- Continue to build our endowment by focusing on increasing the unrestricted fund
- Develop working relationships with professional advisors to enhance awareness of creative methods of giving and promote Legacy Society
- Cultivate relationships with and solicit local donors
- Prudently manage investments/endowed funds

### Grantmaking

- Support the local nonprofit sector through good grantmaking
- Establish a proactive grantmaking program, linking funding priorities to community needs
- Measure outcomes and impact of funded programs
- Build collaborations

### Community Engagement

- Increase and develop The Community Foundation's relationships with local nonprofit organizations
- Promote nonprofit organizational effectiveness
- Increase community understanding of the Foundation while educating the public about philanthropy

Our door is always open, stop by and visit us at:  
**201 E. Jackson Street, Suite 100**  
**Muncie, IN 47305**



Foundation staff stands in front of the stacks at Eaton Public Library. In 2017, the library received a \$4,558 grant to replace aging computer workstations, software, warranties, and accessories.

**Front Row:** Kelly K. Shrock, Carly Acree-King, Kallie Sulanke  
**Back Row:** Cheryl Decker, Eunice Whitlock, Marcy Minton

Steven Murphy, Legal Counsel

Catharine Stewart, Financial Counsel



Excellence. Accountability. Impact.™

*Confirmed in compliance with National  
Standards for U.S. Community Foundations.*