



ORANGE COUNTY
COMMUNITY
FOUNDATION, INC.
1075 N Sandy Hook Rd, Suite 2
Paoli, IN 47454

Phone: 812-723-4150

www.occf-in.org

Orange County
is all of us...

Donor's Guide to the

**ORANGE COUNTY
COMMUNITY FOUNDATION, INC.**

FOR MORE INFORMATION...

Please feel free to contact us at any time.

We're here to serve you
and your charitable wishes.

PHONE:

812-723-4150

ONLINE:

www.occf-in.org

ADDRESS:

1075 North Sandy Hook Rd., Suite #2

Paoli, IN 47454

FACEBOOK:

facebook.com/orangecountycf

TWITTER

twitter.com/orangecountycf



WHAT IS A COMMUNITY FOUNDATION?

A community foundation is a tax-exempt public charity that provides a means for people like you to make a difference in your own community. You can do so by contributing to an established fund, or by creating a new fund of your own!

Your contribution or your new fund is then invested jointly with our many other endowed funds and managed by professional investment managers. Over time the assets grow, and grants are awarded from each fund to support the local community in accordance with the donors' intent and to meet the unique needs of our own community.

Your community foundation is pro-active in the community, identifying current and emerging issues, stimulating resources to address those issues, and helping our region prepare for the future. We advance innovative philanthropic solutions to challenging problems, and engage donors to make our community a better place.

The foundation is a center of philanthropy; and through visionary leadership and strategic grant-making, we strive to strengthen the common good throughout our county.

**A GIFT TO THE
ORANGE COUNTY COMMUNITY FOUNDATION
MAKES A LASTING DIFFERENCE
FOR ORANGE COUNTY!**

WHY CHOOSE A COMMUNITY FOUNDATION?

We know our community and its needs, and the opportunities it offers. The broad cross-section of leadership guiding the Orange County Community Foundation's work lends valuable insight that will enable your gift to achieve superior results.

We can help you receive maximum tax benefits. Since the Orange County Community Foundation is a public charity under IRS Section 501(c), all gifts made to funds held with the Foundation are tax-deductible to the fullest extent of the law.

We make being a philanthropist much easier! Giving through OCCF eliminates the need for you to jump through all the legal hoops of creating and maintaining a private foundation or a charitable trust.

WE SHARE YOUR INTERESTS.

Orange County's future depends on the charitable priorities of caring, committed citizens—just like you—being met.

**WE GIVE YOU AN IDEAL OPPORTUNITY
TO CREATE A LEGACY...**
for yourself, your family, and your community
THAT WILL MAKE AN ENDURING DIFFERENCE.

RESTRICTIONS

Since the Foundation is a designated charity, there are rules of both state and federal authorities to be adhered to—most notably, the strict regulation of scholarship funds.

The recipient of each scholarship awarded must be chosen from a competitive pool of applicants. If the criteria established by the donor is too restrictive to allow for a competitive pool, the criteria will be relaxed to encompass a broader range of eligible applicants. This is in accordance with federal law as established by the Pension Protection Act of 2006, which designated a scholarship award as a grant for the benefit of an individual. For this reason, all scholarship awards are made directly to the school the student is attending, rather than to the student himself or herself. Scholarship awards are, however, designated for the individual students for whom they were selected.

Any grants made directly to an individual must be established in the fund agreement as an achievement award for a specific type of accomplishment. For example, an outstanding teacher, an outstanding science project, etc. These are the only grants that, under federal law, may be made directly to an individual.

Scholarship awards may not be given to members of the donor's or donors' families or to members of donor advisors' families. Scholarship advisors as determined by the fund agreement are subject to approval by the Orange County Community Foundation, Inc. Board of Directors, and names of those individuals must be supplied to the Foundation prior to any selection proceedings.

All grants made from funds held with the Foundation are subject to final approval by the Orange County Community Foundation, Inc. Board of Directors, including scholarship awards. For more information, contact our office at 812-723-4150.

WON'T YOU HELP US BUILD A BETTER COMMUNITY?

Since 1996, millions of dollars in grants and scholarships have been awarded in Orange County from funds held with the Orange County Community Foundation, Inc. through the generosity of donors like you.

And, thanks to the permanence of endowed funds, support of charitable causes and programs will continue perpetually through the funds created by Orange County donors.

Since disaffiliating from the Lawrence Co. Community Foundation in 2001, the Orange County Community Foundation has been prepared to offer a full range of philanthropic assistance—both to donors and to other charitable organizations. Our staff members have years of experience in the fields relative to the management of charitable funds, and each staff member continues training each year to serve you more fully and efficiently.

We can help you contribute to a fund which supports a cause you feel strongly about, or guide you through the process of creating a new fund.

OUR MISSION:

BUILDING A BETTER
COMMUNITY...TOGETHER!

HOW DOES A COMMUNITY FOUNDATION OPERATE?

Your community foundation here in Orange County is governed by a 15-member Board of Directors, with appointees from throughout the county. Our board members represent every community within Orange County, as well as many diverse areas of knowledge and expertise. Every member of our Board of Directors is a volunteer. No one is paid to serve on the board, but the members do so out of caring, dedicated concern for Orange County and with the intention of improving the quality of life for everyone here.

The staff of your community foundation has more than 120 years of combined experience in the areas of marketing, finance, business administration and management, grant-writing, accounting, charitable pursuits, and more. We are constantly in touch with the needs of the county, and create programming and projects designed to meet those needs.

Your community foundation is a local leader, guiding collaborative efforts on behalf of Orange County, spearheading community programs, and working with local, state and federal government agencies and non-profit organizations in their efforts to improve the quality of life for Orange County's people.

We are here to answer your questions and to help you realize your dreams and wishes for Orange County's future.

IT'S WHAT WE DO.
IT'S WHY WE'RE HERE.

SEVEN EASY STEPS TO EFFECTIVE PHILANTHROPY

1. Discuss your overall charitable goals with your family members and legal or tax advisors.
2. Decide the amount you and your family are comfortable giving and how you wish to give.
3. Determine the cause or organization that you feel most strongly about addressing or assisting.
4. Meet with us to discuss your plan. Ask questions, explore the different options available to you.
5. Our planned giving professionals are available to assist you in implementing your plan for Orange County's future.
6. Make your charitable gift and utilizing the assistance of our financial advisors or your own finance professionals.
7. Review the confirmation of your completed gift and the ongoing progress of grants awarded from the fund you have chosen to support.

Our Values...

COLLABORATION

DIVERSITY

INCLUSIVENESS

RESPECT

INNOVATION

INTEGRITY

RESPONSIVENESS

PUBLIC ACCOUNTABILITY

TRANSPARENCY

YOUR GIFT HELPS BUILD A BETTER COMMUNITY FOR US ALL...

The mission of your community foundation is building a better community—together with our donors, our local organizations, and the people of Orange County. We know you, too, care about your county and your friends, family and neighbors who also call this place home.

We strive to carry out our mission in the following ways:

As a STEWARD...

...by developing and managing permanent endowment funds which fund community improvements and support charitable causes.

As a STRATEGIC GRANT MAKER...

...by awarding grant and other support to enable the community to respond to emerging and changing needs and opportunities.

As a CHARITABLE RESOURCE...

...by encouraging and educating donors and providing a flexible vehicle for individual donors, non-profit organizations, and the community at-large.

As a CATALYST...

...by mobilizing community leadership in response to issues.

TYPES OF FUNDS AVAILABLE

DESIGNATED

Designated funds support the charitable organizations for which they are created. Each fund is designed to provide an annual income for the specific agency or organization it supports. These funds carry the lowest management fee.

DONOR-ADVISED

Grants from these funds are, as the name implies, subject to donor advisement. Each year the donor will be offered the opportunity to request what charitable causes and/or organizations the fund's grant payout will support.

FIELD OF INTEREST

Each field of interest fund is established to address a specific area of need or concern, such as education, historic preservation, or community projects. These funds provide an annual income for such fields of interest in perpetuity.

UNRESTRICTED

Unrestricted funds are the most flexible, meeting needs as they arise within the County through regular payouts to agencies, organizations, or charitable programs addressing immediate or ongoing concerns.

SCHOLARSHIPS

These funds provide financial assistance for secondary education to Orange Countians, both graduating high school seniors and non-traditional college students. Because of the high degree of administration of these funds, they carry the highest rate of management fee.

NON-PERMANENT

Non-permanent—or pass-through—funds are put into place to provide immediate use of monies for charitable purposes and organizations. These funds are not endowed.

FUNDS FOR ORANGE COUNTY

DESIGNATED FUNDS

Backpacks of Blessings
Chuck Akers Athletic Memorial
Dallas Tyler Memorial
David K. Ross for OCCF Youth Council
Delta Chapter Kappa Kappa Kappa
First Chance Center
First Presbyterian Church of Paoli
Fred and Ethel Crowe Education Award
Friends Lick-West Baden Museum
Friends of the Paoli Public Library
Friends of Tots to Tots
Good Samaritans
Hackney-Ferguson Fund for Orange County Humane Society
IU Health Paoli Hospital Foundation
Irvin and Melba Mefford Designated
Kelly Tow Memorial
Martin Family for Paoli Library
Melton Public Library
OCCF, Inc. Operating Endowment
Orange County 4-H Clubs Assn., Inc.
Orange County Chapter D.A.R.
Orange County Habitat for Humanity
Orange County Historical Society
Orange County Humane Society
Orange County Players
Orleans Christian Church
Orleans School Corporation
Orleans Town/Township Public Library
Paoli Christian Church
Paoli Mennonite Fellowship (Missions)
Paoli Mennonite Fellowship (Operations)
Paoli School Corporation
Running Start (Paoli)
Saving Historic Orange County
Simmons Fund for Old Union Cemetery
Southern Indiana Community Health Care
Springs Valley School Corporation
Springs Valley Education Foundation
Throop Elementary PTO
Virginia Combs Literacy
William and Mildred Hoke for the Orange County Historical Society

William and Sylvia Kearby and
Elwood and Alana Walters Memorial
Wonder Valley Christian Assembly

NON-PERMANENT FUNDS

Add and Mabel Gray Designated
Backpacks of Blessings
Blackhawk Blessings
Bulldog Backpacks
Charlie's Angels
French Lick Artisans
French Lick-West Baden Museum
Friends of Paoli Public Library
Good Samaritans
Nofziger Family
OCCF, Inc. Operating
OCCF Youth Council
OCCF, Inc. Scholarships
Orange Cancer Cancer Patient Services
Orange County Service Council
Orange County Spelling Bee
Paoli Park Playground (Playoli)
Orleans Running Start
Paoli Running Start
Rick Magill Clothe-a-Child
Safe Haven
Schmidt Family Fund
Springs Valley Adopt-A-Classroom
Springs Valley Community Christmas
Springs Valley Pet Services
Springs Valley Running Start
Throop Elementary Jubilee Christmas
Throop Elementary PTO
Throop Elementary Sixth Grades
Town of Paoli

UNRESTRICTED FUNDS

Brown Family
Red and Versa Burke Memorial
Wendell and Helen Gooch Memorial
OCCF "Share the Love"
OCCF Youth Council
Paoli, Inc.
Don Simmons
Tegarden
Michael and Janalyn VanEmon
William H. and Connie A. Jenkins

SCHOLARSHIP FUNDS

Alan Barnett Community Service
Alexander Art Award
Anita Bradford Art
Armintia Sue Magner Memorial
Billy Drury Memorial
Bradley, Henderson, Humphreys
and Puckett Families
Charles and Violet Galloway Memorial
Cpl John D. Cook Memorial
Clarice White Bridgewater Memorial
Delta Chapter Kappa Kappa Kappa in honor
of Elinor Gardner Jones
Donald and Dody Conrad Agriculture
Donnie Kee III Memorial
Donnie Martin Memorial
Dr. E.T. Uyesugi Memorial
Dr. Robert J. Cloud Citizenship Award
Dr. Vic Combs Memorial
French Lick High School Alumni Assn.
George W. & Evelyn P. Sorrells Memorial
Hoosier Hillside Master Gardeners
IU Health Paoli Hospital Foundation
James A. Babcock Memorial
James M. Thompson Memorial
Janet and Leonard Vaught
Jared Hammack Memorial
Jesse Pease Memorial
Joseph Crowder Memorial
Justin Moon Memorial
Justin Mullis Memorial
Keith Howard Memorial
Kelly Tow Memorial
Kenneth and Madge Newlin
Kerry Wyatt Memorial
Leon and Eva Johnson Designated
Leon D. Lewis and Mary Newlin Lewis
Lewis and Winnora Allen Memorial
Margaret Houston Memorial
Mark Sisco Memorial
Mary Beth Cornwell Memorial
Maud Anna Ham Memorial
Maurice and Evelyn Tow Memorial
Memories of Our Mothers (MOM)
Moore Family in Memory of Sandra
Moore Pearson
Neva Fleming Memorial
Newlin-Stout
Orange County Child Care Co-op
Orleans School Foundation Designated
P.H. Rynhart Memorial

Paoli High School Alumni Association
Paoli Meridian Lions Club
Ray Gardner Memorial
Rosetta Mae Atkinson Memorial
Russell O. Doan Memorial
Ruth Farlow Uyesugi Memorial
Simmons Designated
Smithville Charitable Foundation
Non-Traditional
Stephanie Babcock & Bailey Carty Memorial
Sugarman Trust
Syria Christian Church Designated
Terry Nofziger Memorial
USS Chimaera Star Trek Club

SUPPORTING ORGANIZATIONS

Sol Strauss
Orange County Commissioners

FIELD OF INTEREST FUNDS

OCCF, Inc. Education Fund/CAPE
Orange County Child Care Co-Op

DONOR-ADVISED FUNDS

Clements Family
Hollis Denbo
James Farlow and Mabel Miller
Luke and Donna Mosemann
Nice-Riester
Smithville Charitable Foundation



1075 N Sandy Hook Rd, Suite 2
Paoli, IN 47454

812-723-4150

www.occf-in.org