



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

**Phone: 812-723-4150**

[www.occf-in.org](http://www.occf-in.org)



ORANGE COUNTY  
COMMUNITY FOUNDATION, INC.

*Building a better community. . . together!*

*A Donor's Guide*



## 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](http://www.occf-in.org)

ADDRESS:

1075 North Sandy Hook Rd., Suite #2  
Paoli, IN 47454

FACEBOOK:

[facebook.com/orangecountycf](https://facebook.com/orangecountycf)

TWITTER

[twitter.com/orangecountycf](https://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.

**Your 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

## TYPES OF FUNDS

### 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.

#### 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

## SCHOLARSHIP FUNDS

Alan Barnett Community Service  
Alexander Art Award  
Anita Bradford Art  
Arminta 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  
Davis-Metz  
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 Hillsides 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  
Matt Henderson Memorial  
Maud Anna Ham Memorial  
Maurice and Evelyn Tow Memorial

Memories of Our Mothers (MOM)  
Moore Family in Memory of Sandra  
Moore Pearson  
Morgan Marie Apple Memorial  
Neva Fleming Memorial  
Newlin-Stout  
Orange County Child Care Co-op  
Orleans Classroom Teachers Assn.  
Orleans School Foundation Designated  
P.H. Rynehart Memorial  
Paoli High School Alumni Association  
Paoli Meridian Lions Club  
Ray Gardner Memorial  
Rosetta Mae Atkinson Memorial  
Russel and Reba Farlow Memorial  
Russell O. Doan Memorial  
Ruth Farlow Uyesugi Memorial  
Simmons Designated  
Smithville Charitable Foundation  
Non-Traditional  
Springs Valley United Methodist Church  
Stephanie Babcock & Bailey Carty  
Sugarman Trust  
Syria Christian Church Designated  
Terry Nofziger Memorial  
USS Chimaera Star Trek Club

## 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  
C.J. and Catlin Fleenor  
Duke Energy  
Fred Sensing Memorial Youth

## SUPPORTING ORGANIZATIONS

Sol Strauss  
Orange County Commissioners

## 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  
French Lick-West Baden Museum  
Friends of the Paoli Public Library  
Friends of Tots to Tots  
Good Samaritans  
Hackney-Ferguson Fund .  
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 OCHS  
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 Crisis Response Fund  
Orange County Service Council  
Orange County Spelling Bee  
Paoli Park Playground (Playoli)  
Orleans Running Start  
Paoli Pals  
Paoli Running Start  
Rick Magill Clothe-a-Child  
Schmidt Family Fund  
Springs Valley Adopt-A-Classroom  
Springs Valley Community Christmas  
Springs Valley Pet Services  
Springs Valley Running Start  
Team OC  
Team Peace  
Throop Elementary Jubilee Christmas  
Throop Elementary PTO  
Throop Elementary Sixth Grades  
Town of Paoli

## 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