

About Us

We love this community, and work with others who love it, too. Our primary focus is building a better Orange County, and we accomplish that in a number of ways--through the management of endowed charitable funds, strategic grant-making and scholarships, and through partnering with other local, regional, and state organizations to bring about change and better lives for the people of Orange County, Indiana.

Contact



812-723-4150



occf-in.org



kallen@orangecountycommunityfoundation.org



ORANGE COUNTY
COMMUNITY FOUNDATION INC.

DONOR GUIDE

Building a Better Community... Together

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



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.

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 GIVE YOU AN IDEAL OPPORTUNITY

TO CREATE A LEGACY...

for yourself, your family, and your community

THAT WILL MAKE AN ENDURING DIFFERENCE.

FUND RESTRICTIONS

The Orange County Community Foundation (OCCF) operates under strict state and federal regulations, particularly regarding scholarship funds. Federal law mandates that scholarship recipients must be chosen from a competitive pool of applicants. If a donor's criteria are too restrictive to allow for competition, the guidelines will be broadened to ensure compliance. As per the Pension Protection Act of 2006, scholarships are considered grants for individuals, which is why awards are made directly to the recipient's school, although they are designated for specific students.

Direct grants to individuals are only permitted for achievement awards recognizing specific accomplishments, such as excellence in teaching or scientific innovation, and must be outlined in the fund agreement. Additionally, federal law prohibits scholarship awards to the families of donors, donor advisors, or their relatives. Scholarship advisors named in the fund agreement require approval from the OCCF Board of Directors, and their names must be submitted before selection begins.

All grants, including scholarships, are subject to final approval by the OCCF Board of Directors to ensure compliance with applicable laws and policies. For more information or guidance, contact the OCCF office at 812-723-4150.

WILL 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.

In addition, the Foundation has four full-time staff members with experience in the areas of finance, business administration and management, grant-writing, marketing, 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

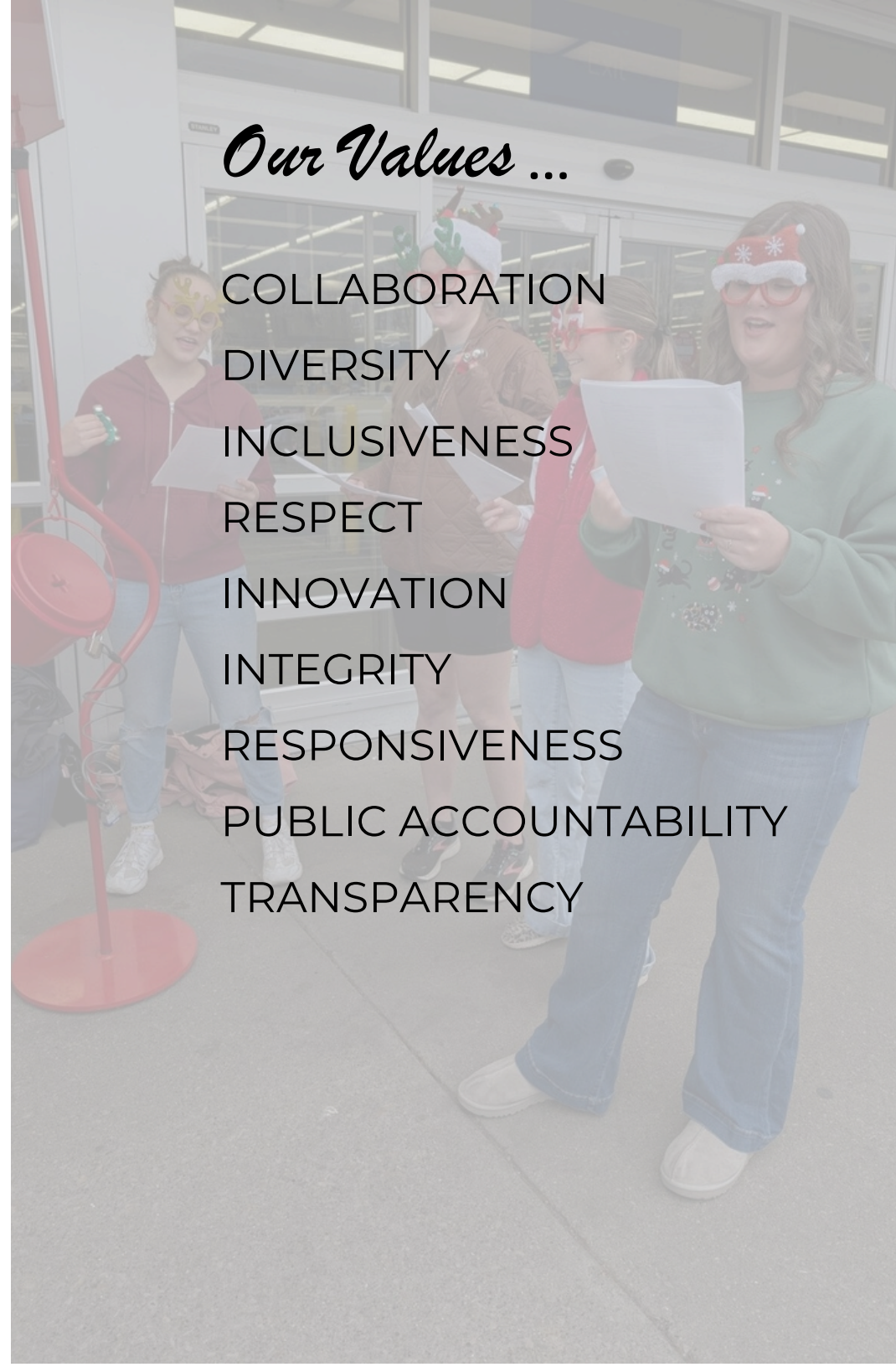
INNOVATION

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

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
Danny Clipp
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 Hillside's 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
P.H. Rynehart Memorial
Paoli High School Alumni Assoc.
Paoli HS Class 1965
Paoli Meridian Lions Club
Pierce TI Copeland Memorial
Ray Gardner Memorial
Rosetta Mae Atkinson Memorial
Russell and Reba Farlow Memorial
Russell O. Doan Memorial
Ruth Farlow Uyesugi Memorial
Simmons Designated
Smithville Charitable Foundation - NT
Springs Valley United Methodist
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 Academy

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
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

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