

Annual Report



Community Foundation
For Rockbridge, Bath, and Alleghany Counties

Enriching the Future of the Rockbridge, Bath and Alleghany Areas

2019-2020

Our Board



Buddy Bryan
Chairman



Barbara Luton
Vice Chairman



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Treasurer



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Secretary

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Greg Madsen



Ben Worth



From the Executive Director:



Lori Turner
Foundation Executive Director

The COVID-19 pandemic of 2020 created so many challenges for all of us and we were forced to completely re-invent ourselves. The Community Foundation stepped out of its box and created an advisory coalition to provide information and resources to help determine the most critical needs throughout the crisis. We worked hard with these partnerships to stay on top of the situation as new priorities emerged daily. We also worked with city leaders, business owners and not for profit directors to understand the influx of Federal funds that flowed into our communities, so that we were not duplicating efforts.

We've all been affected by COVID-19 in one way or another, but some of our neighbors were particularly vulnerable to the wide-ranging and urgent consequences of this pandemic, including food insecurity, childcare needs, homelessness and mental health issues. We quickly realized it was critical that we help the nonprofits who were serving

our at-risk populations and find ways to help our local businesses survive.

The Community Foundation contributed their fee for the administration during the COVID19 pandemic. As a result, 100% of every contribution benefited the communities we serve. The CFRBA Board of Directors personally provided the initial \$15,000 in contributions. The CFRBA COVID19 Relief fund grew to over \$120,000 to help our neighbors in need. This was soon supplemented with over \$260,000 in CARES funding from our local governments who entrusted us to make distributions for them. These efforts combined with our normal annual grant distributions of nearly \$220,000 allowed CFRBA to distribute \$600,000 to the communities we serve in 2020. We did our very best to play a strategic role during these difficult times. We are so thankful for our generous donors who made this possible.

2020 CFRBA Grant Recipients

DONOR ADVISED- AGENCY AND UNRESTRICTED FUNDS

Alleghany Highlands Community Services
American Cancer Society
American Heart Association
ARC of Rockbridge
Blue Ridge Legal Services
Boxerwood Education Foundation
Boy Scouts of America
Boys Home of Covington
Brownsburg Community Association
Camp Mont Shenandoah
Christmas Baskets
Community Table of Rockbridge
Concerned Citizens of Glasgow
Covington Special Olympics
Dabney Lancaster Community College
Effinger Fire Department
English Speaking Union
Fine Arts of Rockbridge
Girl Scouts of Virginia Skyline
Glasgow/Nat. Bridge Food Pantry
Goodwill of the Valleys
Grace Episcopal Church- Fowler Fund
Hillsdale College
Hoofbeats Therapeutic Riding Center
Hull's Drive In (Hull's Angels)
Juvenile Diabetes Research Foundation
Kerrs Creek Fire Department
League for Animal Protection
Lexington City Schools
Lexington Police Foundation
Lexington Sunrise Rotary
Lexington Woman's Club
Main Street Lexington
March of Dimes

Meals for Shut Ins
Meals on Wheels - Maury River Senior Center
Music Program of Grace Episcopal Church
Rockbridge NAACP
Natural Bridge Volunteer Fire Department
Nature Camp
Parry McCluer Middle School
Project Horizon
Rockbridge Area Disability Services
Rockbridge Area Habitat for Humanity
Rockbridge Area Health Center
Rockbridge Area Hospice
Rockbridge Area Relief Association
Rockbridge Area SPCA
Rockbridge Area Transportation System
Rockbridge Area YMCA
Rockbridge Care-Box Project
Rockbridge Care-Box Project
Rockbridge Historical Society
Rockbridge Regional Library Youth Literacy
Rockbridge Retreat Project
Salvation Army
Savannah Country Day School
Shenandoah Academy of Dance
St Jude's Research Center
St Luke's Outreach
St. John's Episcopal Church, Glasgow
The Community Table
Town Creek United Methodist Church
United Way of Rockbridge
Valley Program for Aging Services
Virginia Horse Center
Walker Program
Yellow Brick Road Learning Center



Louis Blair

In Memory

Louis and Suzanne Blair established two scholarship funds at CFRBA to honor his family and his beloved Pastor Fred Noll of the Bethesda & McElwee Chapel Presbyterian Church. Louis passed into his heavenly home on September 5, 2020 at age 81. Louis left behind an amazing legacy of accomplishments. Louis relished helping people find a way to change their lives. He believed if you've helped one person outside your family, you've made a difference.

Current Endowed Funds

ALTA F. FOWLER MEMORIAL FUND

Established through the estate of Alta F. Fowler, this fund supports Grace Episcopal Church

ANASTASIA DICKINSON PAYNE MEMORIAL FUND

Established by the Stacy Payne Estate to support financial needs of Camp Mont Shenandoah Campers.

ANNE HAMILTON-MOORE FUND

Established by Anne Hamilton-Moore to fund public, educational and charitable purposes.

BETHESDA/MCELWEE CHAPEL SCHOLARSHIP FUND

Established by Louis Blair to honor Pastor Fred Noll.

BLAIR FAMILY SCHOLARSHIP

Established by Louis & Suzanne Blair to provide scholarships to deserving graduates.

BIG HILL FUND

Donor Advised fund established by Robert Biersack and Jan Smith to support public, educational and charitable purposes.

BOXERWOOD EDUCATION FOUNDATION FUND

Established to support the mission of Boxerwood Gardens.

BOYS HOME OF COVINGTON-ROCKBRIDGE FUND

Designated Fund established by Fred Swope to support the mission of the Boys Home.

BRANNER FAMILY FUND

Donor Advised fund established by Elizabeth and Wade Branner for the charitable purposes of the Foundation.

BROWNSBURG COMMUNITY FUND

Established for the charitable, educational and public purpose of the Brownsburg Community.

CAMP SPIRIT SCHOLARSHIP OF CAMP MONT SHENANDOAH FUND

Established by Camp Mont Shenandoah Ltd., this fund provides scholarship assistance to attend Camp Mont Shenandoah.

CARILION STONEWALL JACKSON HOSPITAL AUXILIARY FUND

Established by the SJHA for scholarships in the medical field

CARTER GOAD MEMORIAL FUND

Established by Lloyd Goad, to provide Latin students with the opportunity to engage in Latin oriented activities.

CHARLES H. LAUCK, JR. MEMORIAL SCHOLARSHIP

Established by Mrs. Jacqueline Lauck, this fund provides college scholarships to Rockbridge County High School graduating seniors.

CHRISTMAS BASKETS FUND

Established by anonymous donors for the benefit of Christmas Baskets

CLYDE G. MOORE & ANGELYN C. MOORE FUND

Established by Clyde and Angelyn Moore to support charitable purposes.

CORRINGTON FAMILY FUND

Donor Advised fund established by Richard Corrington to support public, educational and charitable purposes.

COVINGTON WOMEN'S CLUB OF GFWC – MARGARET GRESHAM SCHOLARSHIP

Established by the Covington Woman's Club.

COX FAMILY FUND

Donor-Advised Fund established by David & Melissa Cox to fund public, educational and charitable purposes.

DONALD BROWN & KATIE KAIN FUND

Established by Donald Brown and Katie Kain for public, educational and charitable purposes.

EDWARD F. TURNER, JR. MEMORIAL FUND

Established by Pauline S. Turner and her daughters, provides college scholarships to Rockbridge County High School graduates.



ELDRIDGE & MARY PULTZ FUND

Donor Advised fund established by Eldridge and Mary Pultz.

ELIZABETH KNAPP & CHARLES SMITH FUND

Established by Elizabeth Knapp and Charles Smith to support charitable purposes.

ENGLISH-SPEAKING UNION OF THE UNITED STATES (LEXINGTON BRANCH) FUND

Established by the Lexington Branch of the English-Speaking Union of the United States, for its charitable purposes.

ERIC CHARLES BOWYER MEMORIAL FUND

Established by Lester W. and Karen B. Bowyer, this fund provides scholarship to Bath County High School.

GABE, MARY, AND ELIOT BALAZS MEMORIAL FUND

Established and advised by Bryan Balazs, this fund supports a wide range of community needs.

GEORGE C. MARSHALL CHAPTER OF MOAA SCHOLARSHIP

Established to provide higher education to a RCHS graduate.

GILLIAM FAMILY FUND

Donor Advised fund established by Mary Stuart Gilliam for the charitable purposes of the Foundation.

GRIGSBY FAMILY FUND

Established by Ben & Carol Grigsby for public, educational and charitable purposes.

HELEN D. HODGES FUND

Established and advised by Louis and Helen Hodges, this fund supports a wide range of community needs.

HOOFBEATS THERAPEUTIC RIDING CENTER FUND

Designated Fund established by Julianne Hollingsworth to support Hoofbeats mission.

JACQUELINE CORBIN PLEASANTS SCHOLARSHIP FUND

Established by the Rockbridge County Democratic Party, provides annual scholarships to Rockbridge County High School graduates.

JOMP JETS FUND- DONOR ADVISED FUND

Established by Jason Hill to support public, educational and charitable purposes.

LEXINGTON CITY SCHOOLS (KOONES) FUND

Established by the Lexington City Schools for its educational purposes.

LEXINGTON HIGH SCHOOL ALUMNI SCHOLARSHIP FUND

Established by the Lexington High School Alumni Association to provide an annual scholarship to a deserving graduate.

LEXINGTON KIWANIS CLUB FUND

Established by the Lexington Kiwanis Club to benefit the organization's charitable purposes.

LEXINGTON SUNRISE ROTARY FUND

Established for Rotary overseas projects.

LUTON FAMILY FUND

Established by Bill & Barbara Luton for public, educational and charitable purposes.

THOMAS FAMILY FUND

Established by Carlson and Patty Thomas for public, educational, and charitable missions.

MARGARET "MAGGIE" THOMAS DIABETES FUND

Established by the Margaret Thomas estate to support Juvenile Diabetes Research.

MARGUERITE AVERETT FUND

Donor Advised Fund established by the family of the late Marguerite Averett.

MAYERCHAK FAMILY FUND

Donor Advised Fund established by Patrick and Mary Jane Mayerchak.

MIMI & JOHN ELROD FUND

Established by Mimi Elrod to support educational purposes.

Continued on page 6

Current Endowed Funds Continued from page 5



NATURE CAMP FINANCIAL ASSISTANCE FUND

Established by Fred Swope to provide financial assistance to campers.

NATURE CAMP SCHOLARSHIP FUND

Established by Family and Friends of the late Eliot Balazs.

RON AND JAN PERKINS FUND

Established by the Perkins family to benefit the CFRBA unrestricted grants process.

PROJECT HORIZON FUND

Established for the benefit of Domestic and Sexual Violence Victims.

REED FAMILY FUND

Established by the late Olivia Reed to fund public, educational and charitable purposes.

ROBBLEE FAMILY FUND

Donor advised fund established by Paul and Joanne Robblee.

ROCKBRIDGE AREA CONSERVATION COUNCIL FUND

Agency Fund to Support the Rockbridge Area Conservation Council.

ROCKBRIDGE AREA HABITAT FOR HUMANITY FUND

Established by Fred Swope to support the mission of the Rockbridge Area Habitat for Humanity.

ROCKBRIDGE AREA HEALTH CENTER FUND

Established to support the mission of the Rockbridge Area Health Center.

ROCKBRIDGE AREA HOSPICE FUND

Established by the Rockbridge Area Hospice to support its mission.

ROCKBRIDGE AREA RELIEF ASSOCIATION FUND

Agency Fund established to support the mission of RARA.

ROCKBRIDGE AREA SPCA FUND

Designated Fund established by Fred Swope.

ROCKBRIDGE AREA YMCA FUND

Established for the charitable purposes of the Rockbridge Area YMCA.

ROSWELL TRUMAN MEMORIAL FUND

Established and advised by Dorothy Truman, this fund supports a wide range of community needs.

SOUTHERN VIRGINIA UNIVERSITY FUND

Scholarship fund established to support Puerto Rican students attending SVU.

ST. LUKE'S EPISCOPAL CHURCH OUTREACH FUND

Established by Joanne P. Ingalls, this fund supports the St. Luke's Episcopal Church Outreach Program.

STEARNS FAMILY FUND

Established by Bill and Laura Stearns to support charitable purposes.

SOUTHERN VIRGINIA UNIVERSITY LATINO SCHOLARSHIP

Established by Gail McLeod for the purpose of supplying students with necessary funds to participate in extracurricular events.

VALLEY PROGRAM FOR AGING SERVICES FUND

Established by the late Chuck Phillips to support the mission of the Maury River Senior Center.

VANCE FAMILY FOUNDATION FUND

Established by the family of Dan and Kathleen Vance to support public, educational and charitable purposes.

VIRGINIA HORSE CENTER FUND

Established to support the mission of the Virginia Horse Center.

WARNER FAMILY FUND

Donor Advised Fund established by Harry and Sis Warner to fund public, educational and charitable purposes.

WHITSITT-MASSEY FUND

Donor Advised Fund established by Sue Whitsitt and Fred Massey.

WOODSON & LORRAINE SADLER JR. FUND

Established by Lorraine and Woody Sadler, this fund supports a wide range of community needs.

Camp Mont Shenandoah Scholarships

THE CAMP SPIRIT SCHOLARSHIP FUND OF CAMP MONT SHENANDOAH

Camp Mont Shenandoah, a traditional summer camp located in beautiful Bath County, Virginia, and one of the oldest girls' camps in the country, was started in 1927 by Nannie West with fewer than thirty girls. Since that time, the camp has grown and developed to welcome close to 300 campers during the summer season. The camp is very fortunate to have many second, third and fourth generation girls attend as well as a high rate of returning campers, an attribute to her unique spirit. CFRBA administers scholarships each year to campers who request financial assistance.



CAMP OKAHAHWIS SCHOLARSHIP FUND

In 2001, alumnae of Camp Okahahwis established the Camp Okahahwis Scholarship Fund to memorialize their camp (which closed in 1966), and to acknowledge and perpetuate the values instilled in them through generations of summer camp experiences. In 2017, the members of the Camp Okahahwis Scholarship committee resigned, designating their Fund's annual spendable income for distribution to eligible young women attending Camp Mont Shenandoah. They felt strongly that Camp Mont Shenandoah and the Camp Spirit Scholarship mirrored the spirit and values they sought to perpetuate through the Camp Okahahwis Scholarship Fund. CFRBA administers this scholarship on behalf of the Richmond Community Foundation each year.



2020 Scholarship Awards

BLAIR FAMILY SCHOLARSHIP

Haley Bowyer

EDWARD F. TURNER SCHOLARSHIP

Ingrid Sukow

CHARLES L. LAUCK SCHOLARSHIP

Madison Carroll

LEXINGTON HIGH SCHOOL ALUMNI SCHOLARSHIP

Haley Bowyer

PASTOR FRED CHURCH OF THE BETHESDA SCHOLARSHIP

Maggie Hite

JACQUELINE CORBIN PLEASANTS SCHOLARSHIP

Phynley Stores

GEORGE C MARSHALL CHAPTER OF MOAA

Abby Funkhouser

COVINGTON WOMEN'S CLUB OF GFWC SCHOLARSHIPS

Anna Grace Arritt (Covington High School recipient)
Macie L. Miller (Alleghany High School recipient)



Macie Miller (Alleghany High School) and her mother Lynda Miller with Cynthia Baroody of the Covington Women's Club

Woodson & Lorraine Sadler Jr. Fund

DONOR ADVISED FUND SPOTLIGHT



The Colonels Sadler arrived in Lexington the spring of 1992. Woody was assigned as the commanding officer of VMI's NROTC Unit and Lori had just retired from a 26-year career in the Marine Corps. Woody was raised in a military family and is a 1966 VMI graduate who entered the Marine Corps upon graduation. As an artillery officer, he served a 13-month tour in Vietnam followed by a deployment to GTMO Cuba. He came back to the States to attend advanced communications school at Quantico, where he met Lori. Both received orders to Hawaii and that is when he knew the USMC had issued him a wife. They were married 51 years ago in Kailua, Hawaii and had a three-year honeymoon.

During his 28-year career, Woody held command at every level from battery to regimental. He was assigned as the USMC liaison to the Japanese Ground Defense Force and major Marine combat staffs. He served as the USMC liaison to the US House of Representatives, taking him to Cuba in 1976 being one of the first military officers in the

country after the revolution. In 1978, he was the military escort for the delegation that normalized relations with China. He served on the JCS staff and was on the Sec. Def's Executive Secretariat. After his tour at VMI, he retired from the USMC and became an adjunct in the CE & ME departments where he has taught for the past 29 years. After retirement, he was the Ex. Dir of Lex Downtown Assn. and development director for the George C. Marshall Foundation. He served on the vestry of RE Lee Episcopal Church and boards of HLF, Kendal at Lexington, BSA Dist. chair, LDDA, and chair of VDDA. Woody is very active in Rotary serving as the District Governor for Western Virginia and Eastern Tennessee. Through his adolescence, Rotary and the USMC he has visited over 70 countries. He founded the Rockbridge Area Community Foundation and with the help of Dan Vance morphed it into CFRBA, which we all know today.

Lori grew up in Colorado and joined the Marine Corps after graduation from U of Northern Colorado. She was the first

member of her extended family to graduate from college. She was honored by UNC with their prestigious “Trail Blaser Award” and by the YMCA with their TWIN award, a Tribute to Women & Industry, awarded to women who excel in their field, for her accomplishments in the Marine Corps. After Woman Officer School at Quantico, VA. She was assigned as an intelligence officer. She attended the Army Combat Intelligence Course, the Defense Intelligence School and the Marine Corps Command and Staff College. At Headquarters FMF Pacific, Hawaii she worked with local counterintelligence officials and was later assigned to the Defense Intelligence Agency. She served as the Asst G-2 for the third Marine Amphibious Force in Okinawa, Japan. Her assignments included several “firsts” for a woman Marine officer. She was the first woman to be assigned as the G-2 Intelligence officer for a major USMC command, 2nd Force Service Support Group, Camp Lejeune, NC and the first woman to serve as the G-2, on a Marine Expeditionary Force staff, and the only woman to serve as Director of USMC Intelligence.

Her most memorable assignment was as a Captain when she served as an instructor and platoon commander of women officer recruits and Second Lieutenants at the Woman Officer School and The Basic School, Quantico, VA. In Lexington, she started her second career as a Realtor with Lexington Real Estate Connection. Her volunteer efforts have included Rotary, RE Lee Episcopal Church Women and alter guild, Chair VMI blood drive, LDDA and Hospice. Lori & Woody were both awarded the North Star award by the Stonewall Jackson Boy Scout District for their joint involvement in the area program.

The Sadlers are pleased to be part of CFRBA. There are always needs within our communities and having an organization like CFRBA enables donors like them to focus their philanthropy where it is needed. They have allowed their Donor Advised Fund (DAF) to be used by the board as unrestricted money to be sent where the need is greatest. As they grow older, they will direct part of their funds to areas of focus, which believe need attention, but will always leave part of it as unrestricted.

As part of their planned giving, to complement their DAF, which they continue to fund, they have set up a Charitable

Remainder Trust (CRT). While the CRT does not benefit CFRBA until their passing, the remainder of the trust will go to CFRBA as an unrestricted fund. Besides the tax deduction they receive from each donation, the trust is set up to pay them a percentage of the corpus each year. “When we set up the CRT we chose what percentage we wanted to receive for the rest of our lives. As the invested trust grows from earnings, we receive a larger annual payment and the corpus grows for CFRBA”, said Sadler. As a donor the flexibility of a community foundation allows them to choose where their money goes, it grows their money, and allows them to make the biggest impact possible in the community.



Scenes from Woody and Lori's travels with Rotary International

CFRBA Endowment Donors

FY 2019 - 2020

John Anfin	Ben & Carol Grigsby	George Phillips
John Averett	Steve & Frances Grist	George Pryde
Dennis Ayers	Anne Grimmer	Paul & Joanne Robblee
Kathleen Barnett	Pamela Grinder	Rockbridge Medical Society
Robert Beirsack & Jan Smith	David & Ann Hansen	Woodson & Lorraine Sadler
James Bent	Paul Hansdedt & Ellen Satrom	Elaine Sears
Joyce Benton	Christy Harris - Edward Jones	Harrison Skipwith
Malcom Brownlee	Althea Henderson	Joe Skivora
Rebecca Brownlee	Rae Hickman	Katherine Smith
Buddy & Carol Bryan	Alvin & Ernestine Hockaday	Billy Smith
Anne Riffney-Buckner	Jay & Laura Hottel	Lucia Stanton
Bobby Chittum	Roger & Sylvia Jeans	Brian Steffel
Margaret Dyson-Cobb	Carol Karsch	Jane Stewart
Malcom Cothran	Emily King	Donald Thomas Jr.
David & Melissa Cox	Elizabeth Knapp & Charles Smith	Russell Tompkins
Covington Woman's Club	Jacqueline Lauck	Truist Bank
George Marshall Chapter of MOAA	Thomas Lawson	Micheal Lewis Turner Estate
Larkin Dudley	Lexington Democratic Committee	Reggie & Lori Turner
Tamara DuVall	James Loesel	Ross Waller
Joshua & Fran Elrod	Bill & Barbara Luton	Carol Weinstein
Phyllis Fevrier	Greg & Kelly Madsen	Sue Whitsitt & Fred Massey
MaryAnn Fleming	Carla Mathes	John Wilson
Mary Stuart Gilliam	Ellen Mayock	Sarah Wilson
Robert & Rene Glidden	Tara Miller	Lesley Wheeler
Thomas & Carol Gosse	Mike & Pamela Minkler	Sarah Wiant
Jacqueline Gravitt	Sharon Mueller	Stephen Young
	Mary Murphy	

COVID 19 Relief Fund

The Community Foundation for Rockbridge, Bath and Alleghany awarded \$102,000 in three rounds to support those that have been affected during the COVID19 pandemic during FY 19-20. Additional funds are being awarded into FY 20-21.

Donors in our community made the fund possible. Their devotion to the concern for others was demonstrated throughout this pandemic. Because of their support, many have been able to survive hardship during the COVID19 crisis. The COVID 19 Relief Fund donations have been critical to sustaining our communities.

Donations can be made at cfrba.org/COVID19fund



Campus Kitchen



Rockbridge Area YMCA



The Community Table

COVID 19 Relief Fund Recipients

Blue Ridge Legal Services

Boxerwood Education Association

Campus Kitchen

CASA for Children

City of Buena Vista ED Authority

County of Rockbridge ED Authority

Main Street Lexington

Project Horizon

Rockbridge Area Conservation Council

Rockbridge Area Relief Association

Rockbridge Area Transportation System

Rockbridge Area YMCA

Rockbridge Habitat for Humanity

Rockbridge Area SPCA

Talking Book Center

The Community Table

Valley Program for Aging Services

Yellow Brick Road Learning Center

COVID 19 Fund Makes An Impact

“The Rockbridge Area YMCA has been able to provide critical services during this challenging time. Our buildings were closed to the public for 2 months and 20 days; however, we were able to provide emergency childcare to those who needed it most starting in April. We then continued to provide that care launching summer care right after Memorial Day and have served anywhere between 30-45 children each week. We would not be able to do what we do without the impact of the COVID-19 fund through the Community Foundation. We are thankful to live in such a special place with people who care about the well-being of our community.”

*Bobbie Wagner,
Executive Director at Rockbridge Area YMCA*

“Virginia has promoted a “Safer at Home” campaign in response to the pandemic. While it is true that most people are safer at home, nothing could be further from the truth for victims of intimate partner violence. Our requests for services have continued to grow while our financial donations have decreased. We are grateful for the support from the CFBRA which will enable us to continue to serve vulnerable victims of violence.”

*Judy Castele,
Executive Director at Project Horizon*

“Our small businesses are the economic engine of our community and these grants helped ease the financial burden imposed by the shutdown. Through the Relief Fund, Main Street Lexington was able to provide funding to 32 downtown Lexington businesses. We are so thankful to the Community Foundation for their quick response to this unprecedented situation.”

*Rebecca Logan,
MSL Executive Director*

“When COVID hit, RARA had to immediately shift all of our energy into finding solutions to ensure the families we serve still had access to nutritious food, safe shelter, emergency housing, and basic information, even through a pandemic. Figuring out how to fund that work had to take a back seat. It has been incredibly heartening to experience this profuse financial support from our community - both on an individual level and from the coordinated efforts of CFRBA.”

*Jen Handy,
Rockbridge Area Relief Association
Executive Director*

“I can’t begin to tell you how important the support provided by the COVID CARES through CFRBA grants will be to the people we serve. VPAS is currently delivering 40% more Meals on Wheels to homebound seniors in our community than we did before the pandemic. Nutritious meals, along with the human contact provided by Meals on Wheels volunteer drivers will go very far in helping to preserve the health and independence of these frail, often isolated, neighbors.”

*Jeri Schaff,
Valley Program for Aging Services
Executive Director*

COVID 19 Relief Fund Donors

2020

Leslie Ayers
Charles & Susan Barger
Sherry Baucom
Charles Bentley
Theresa Bezold
Linda Black
Bob Biersack & Jan Smith
Jeff & Audrey Boobar
Jack & Leslie Bovay
Kara Braddick
Wade & Elizabeth Branner
Jane Brooke
Charles Brower
Buddy & Carol Bryan
Jessica Buhler
Abby Carico
Jennifer Cassell
Judy Castele
Blaine & Rosemary Cecil
CHEFS Catering
Lynn Chin
Danielle Clark
Ben Cline
Dana Coddington
James Comstock
Christopher Conners
CornerStone Bank
Lloyd & Margaret Craighill
Suzanne Crawford
Dennis Cropper
Sara Cunningham
Thomas Davis
Michelle DeCarr
William DeVine
Barton & Gail Dick
Tyson Dickerson
Robert Donnnelly
David & Mary Dugan
Jeffrey Dunn
Bruce Dwyer
Josh & Fran Elrod
Mimi Elrod
Executive Function Matters
Adam Figlo
Doris Frederickson
Natalie Garvis
Thom Gill
Stephen Givens
Robert & Rene Glidden
Tom & Carol Gosse
Grace Episcopal Church
Annette Green

Ben & Carol Grigsby
Pam Grinder
Steve & Frances Grist
Peter & Julia Grover
Paul Hanstedt & Ellen Satrom
Sandy & Catherine Harcus
Christy Harris - Edward Jones
Amy Hayslette
Sandra Hayslette
Mary Helfenberger
Tammy Hellwig
John Helmouth
Drew & Megan Hess
Robert Holt
Vernon & Mary Honsinger
Robert Huch
Huffman Nationwide Insurance
Ward & Whitney Huffman
Jeff Hughes
Michael Jackson
Alicia Jahsmann
Anita James
Jim Jones
Carol Karsch
William Keese
Emily King
Ruth Kitchen
Linda Koch
Mary Ann Kohl
Iana Konstantivova
Rex & Katherine Lamb
Lai & Betsy Lee
Bob & Kay Lera
Lexington Presbyterian Church
Lexington Sunrise Rotary Club
Lexington Woman's Club
Tamra Lipscomb
Rebecca & Walter Logan
Tina Lowry
Bill & Barbara Luton
Micheal & Anne Lynn
Greg & Kelly Madsen
Main Street Lexington Concert
Lawrence Martin
Fred Massey & Sue Whitsitt
Bruce & Sunny McDonald
Mountain View Brewery
George & Gail McLeod
Colquitt Meacham
Susan Merriman
Clyde & Angelyn Moore
Robert Moore

Cheryl Nester
Natalie O'Dell Photography
Lenna Ojure
Patricia Orendorf
Holly Ostby
Suzanne Pasquini
Susan Piepho
Katie Progue
Elizabeth Ramsey
Paul & Joanne Robblee
Heidi Robinette
Rockbridge Kidds
Rotary Club of Lexington Lunch
Rockbridge Medical Society
John Rudder
Frances Ruley
Woody & Lori Sadler
Melissa Gladwell Sayre
William Sayre
Marilou Schindler
Frederick Schwab
Charlotte Sibold
Chuck Smith & Elizabeth Knapp
Michael Stearns
Molly Steele
Walter Stone
Gretchen Sukow
Mary Ann Taylor
Sherry Teague
Patty Thomas
Christopher Thornton
Patricia Tichenor
Jeffrey Turner
Reggie & Lori Turner
United Way of Rockbridge
University Tees
David & Courtney VanOsten
John Vita Law Offices
David Wade
Rebecca Walters
Dan Walz
Mitch Wapner
Russell Watkins
Pam Wawrzyniak
Lyn & Carol Wheeler
R Gus Wilkinson
Sarah Wilson
Veronia Winkler
Steven Yeakel
Neely & Myra Young
Eugene Zitver

CARES Fund

The Community Foundation for Rockbridge, Bath and Alleghany was asked by Rockbridge County, City of Lexington and the City of Buena Vista to administer the distribution of grants to not for profit agencies adversely impacted by the COVID-19 pandemic. Funding for the grants came to the localities from the federal government via the Corona virus Aid, Relief, and Economic Security (CARES) Act passed by Congress in March. CFRBA was able to award over \$260,000 in grants for this purpose.



Boxerwood



Rockbridge Area Hospice



CFRBA Board Chairman Buddy Bryan receiving 2020 Partnership Award from Rockbridge Area YMCA Executive Director Bobbie Wagner

CARES Grant Recipients

Boxerwood Education Association

Buena Vista City Schools

Campus Kitchen

Christmas Baskets

First Baptist Church of Lexington

Friends of Natural Bridge State Park

Friends of Rockbridge Swimming

Hulls Angels

Project Horizon

Rockbridge Area Health Center

Rockbridge Area Hospice

Rockbridge Area Relief Association

Rockbridge Area Transportation System

Rockbridge Area YMCA

Rockbridge Ballet

Rockbridge Choral Society

Rockbridge Habitat for Humanity

Rockbridge Historical Society

The American Legion

The Community Table

Valley Program for Aging Services

Yellow Brick Road Learning Center

THE WALKER *entrepreneurship* PROGRAM

Train • Fund • Launch • Support

THE WALKER PROGRAM is a new and ongoing community initiative, that will help jumpstart businesses owned by people of color in Lexington, Buena Vista, and Rockbridge County, VA.

It combines free business training, grant funding, and ongoing support to committed individuals who want to start or grow a business in our area. The goal is to lower the barriers to business ownership for entrepreneurs of color in our community.



The Community Foundation of Rockbridge, Bath, and Alleghany will act as the fiscal sponsor of the program, receiving tax-deductible donations and disbursing grants to pitch competition winners.

Donations can be made at cfrba.org/walkerprogram

Walker Program Donors

As of October 2020

Ellen Brock & Joe Borzelleca	Ellen Mayock
Beverly Burks	Camille Miller
Sara Cunningham	John Pancake & Ann Olsen
Jerry Darrell	Wendy Redfern
Grace Episcopal Church	Reed Family Fund
Thom and Lornie Gill	Mark Reed
Ben & Carol Grigsby	Paul & Joanne Robblee
Grizzle Family Foundation	Tinni Senn
David & Ann Hansen	Lindsey Thousand
Paul Hanstedt & Ellen Satrom	Reggie & Lori Turner
Jane Harrington	Dave & Courtney VanOsten
Michele Hentz	Virginia Military Institute
Julie Knudson	Ross Waller & Ann Huebner
Daniel Kramer	Adam Whipple
Jacqueline Lauck	Sarah Wilson
Lexington Presbyterian Church	50 Ways Rockbridge

Fund Options

Almost any charitable purpose can be served through the variety of funds offered by the Foundation. Funds can be established in your name or in the name of a loved one. Funds are managed as permanent endowments.*

Unrestricted Fund

This fund provides the best long-term flexibility to meet a broad range of important community needs as determined by the Foundation's Board.

Field-of-Interest Fund

This fund gives you the option of restricting grants to a particular charitable area of interest. Grant recipients within that field are selected by the Board.

Designated Fund

This fund allows you to choose up front a specific nonprofit organization or group of organizations to receive long-term support.

Donor-Advised Fund

This fund enables you to make recommendations each year as to grants from the fund. You can make the same or different recommendations each year.

Agency Endowment Fund

Nonprofits can establish a fund solely for their benefit within the Foundation, rather than separately creating and managing such funds themselves. Donors who are interested in helping provide significant long-term support to the named agencies are invited to contribute assets to these "open" funds at any time.

Scholarship Fund

This fund helps young women and men pursue educational opportunities.

Memorial Fund

This fund honors the memory of a loved one and perpetuates charitable issues of importance to the individual.

*Establishing an endowment fund requires a minimum of \$10,000. We enable you to create an endowment fund using a wide variety of gift techniques. There are no set-up fees, and it can be done quickly using a simple fund agreement. The Foundation does charge a modest annual charge to administer a fund and support its work in the community. We always encourage you to discuss these ideas with your attorney, accountant, or other professional advisor, as this information is not intended as legal advice.



Yellow Brick Road



Rockbridge Area Transportation System



Hoofbeats Therapeutic Riding Center



Rockbridge Regional Library



Rockbridge Area Health Center

Why an Endowment Makes Sense

... for Individuals or Families

- Because the Community Foundation is a 501(c)(3) charitable organization, you will receive the maximum tax advantage allowed by Federal law for your donation.
- You can provide charitable assistance to your community in perpetuity without having to worry about the day-to-day cost and burden of administration that you would experience with a private family foundation.
- You have several options for your own involvement in how your funds benefit the community, from Donor Advised, in which you make annual recommendations regarding the distribution of funds, to Field of Interest, where you specify an area of interest (e.g., health, education, youth, arts), to Unrestricted, leaving decisions to the Grants Committee of the CFRBA Board.
- Your Fund will be managed by investment professionals, ensuring reasonable return on investment while protecting the principal.
- The Community Foundation can handle all correspondence related to an endowed Fund, including thank you and acknowledgment letters, if you choose to utilize this service.

... for Non-Profit Organizations

- The establishment of an endowed fund is viewed as a responsible act, demonstrating long-term commitment to an organization's mission.
- The establishment of an endowed fund at The Community Foundation ensures that there will be cash flow forever to provide for your organization.
- The fact that your board has set up such a fund helps to attract new funds because prospective donors recognize that the board is responsible by ensuring future cash flows in perpetuity.
- The establishment of an endowed fund at The Community Foundation relieves the administrative burden of accounting for the funds away from your organization.
- Your organization will be listed in The Community Foundation's list of Funds in the Annual Report and other publications and will be viewed by a large number of people, increasing opportunities for additional gifts to the Fund.
- Pass-through gifts are often combined with endowments, giving your organization immediate access to funds.



Meals On Wheels



Rockbridge Area Hospice



Lexington Woman's Club



Arts of Lexington Block Party

Establishing a Fund

Outright Gift

• CASH

You may establish a fund through an outright gift of cash. This is a simple and convenient way to give and receive tax advantages.

• PROPERTY

Some donors may also choose to contribute real or tangible property as the initial assets of the fund.

• APPRECIATED SECURITIES

Gifts of appreciated securities are particularly attractive to donors. When you transfer ownership of the securities to the Foundation you avoid capital gain on the appreciation. The Foundation is a public charity, meaning that it qualifies for the best available treatment under current tax laws and offers full market value deductions as permitted by law.

Individual Retirement Account (IRA)

Individuals with an IRA can make a current gift of up to \$100,000 to the Foundation through a charitable rollover contribution from their IRA's assets. The donor must be 70½ to qualify and the gift must be a direct distribution from the custodial institution. Such gifts can be counted toward the donor's annual required minimum distribution (RMD).

Bequest

You may start a fund through a bequest in your will. Some donors designate a specific dollar amount or a percentage of their estate. Others simply leave the residue of their estate to the Foundation to create their named fund. Bequests are usually fully deductible for federal and state tax purposes. Naming the Foundation to be a full or partial beneficiary of an IRA account may provide the best tax-wise option for an estate gift.

Life Insurance

If you have a paid-up life insurance policy that you no longer need for your family's protection, you might consider giving it to the Foundation to establish a fund. Such a gift would qualify for an income tax deduction. If the policy is not fully paid-up, you may continue to pay the premiums and receive tax deductions for the amount of the premiums.

Charitable Remainder Trust (CRT)

A CRT enables you to provide a lifetime income to yourself, your spouse or other beneficiary, and provide the trust principal to the Foundation at your death. This principal is then used by the Foundation to create a permanent fund named for you or a loved one to carry out your charitable wishes forever.

Private Foundation Trust

For some trustees of private foundations, the demands of administering and making grants from a foundation can become burdensome. The assets of the private foundation can be transferred to the public community foundation, and a fund carrying the same name as the private foundation would be set up. The trustee could continue to be involved with the fund as an advisor but without any of the administrative headaches. The fund would also be relieved of excise taxes and other regulations.

Summarized Financial Report

Community Foundation for Rockbridge, Bath and Alleghany

Fiscal Year Ending June 30, 2020

CURRENT ASSETS

Bank Fund Account	\$67,696.84
Bank Operating Account	\$3,365.07
Bank CDs	\$361,279.18
Marketable Securities	\$5,214,691.66

TOTAL ASSETS

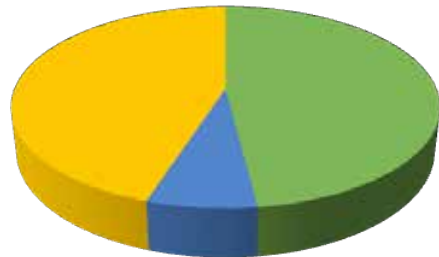
\$5,647,032.75



Excellence. Accountability. Impact.™

FOUNDATION INVESTMENT PORTFOLIO

 United States Stocks	48%
 Non-U.S. Stocks	7%
 Fixed Income & Cash	45%



This simplified summary is intended only as an overview of the Foundation and as such does not include the notes and disclosures required by generally accepted accounting principles.

Mission Statement

The mission of the Community Foundation for Rockbridge, Bath and Alleghany is to improve the quality of life in the Foundation's service area by building permanent endowments and providing philanthropic leadership that enables donors to make lasting investments in the community.

To fulfill this mission, the Community Foundation for Rockbridge, Bath, and Alleghany is committed to:

- Serving the service area (Rockbridge, Bath, and Alleghany Counties and the Cities of Lexington, Buena Vista and Covington) with creative, visionary, and sensitive grants that address the evolving needs of an area experiencing economic and social change.
- Devoting special attention to programs that enrich the quality of life in our communities.
- Advising donors in the areas of their particular concerns and assisting them in achieving the highest likelihood of beneficial results.
- Demonstrating community leadership by designing innovative programs and acting as a catalyst in identifying problems and sharing information with other foundations.



For additional information on the Community Foundation for Rockbridge, Bath and Alleghany please contact Lori Turner at:

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