

Annual Report



Enriching the Future of the Rockbridge, Bath, and Alleghany Areas

2020-2021

# Our Board



**Buddy Bryan**  
*Chairman*



**Barbara Luton**  
*Vice Chairman*



**Thomas Gosse**  
*Treasurer*



**Carol Grigsby**  
*Secretary*



**Josh Ehrud**



**Steve Grist**



**Chrissy Harris**



**Elizabeth Knapp**



**Greg Madsen**



**Joanne Robblee**



**Donnie Wheatley**



**Ben Worth**

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Michael Bozeman  
David Cox  
Robert Giddlen  
Kelly (Dean) Madsen  
Mark Matheson  
Sarah McWilliams  
Charles Phillips  
George Phillips

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Bill Russell  
Woody Sadler  
Sallie Sebrell  
Bryan Thompson  
Russell Tompkins  
Dan Vance  
Patrick Webb  
Susan Whisitt

*Thank you  
for your  
service!*

## From the Executive Director:

No matter how you spin it, 2020 was a year of uncertainty, concern and sorrow for many. Words and phrases like isolation, social distancing, contact tracing, quarantine and panic shopping took new meaning. For many, it was the worst year of their lives.

Yet, in the midst of turmoil, we saw the people engaging in service around us remain deeply caring and generous when it came to helping their neighbors.

Our medical professionals and first responders never stopped working, despite personal risk of contracting the deadly virus. Daycare centers kept their doors open to the children of essential workers. Volunteers continued to assist the most vulnerable members of our community. Our schools distributed food for families with children. And our churches opened their doors to students who needed a place to study. Indeed, many caring hands of the community helped us survive the pandemic.

Our Community was generous with its support throughout the region. As early as March 2020, the Community Foundation was able to respond directly to the crisis by establishing the COVID19 Relief Fund for our area not-for-profits providing food, housing, utilities, daycare and other critical needs. The Community's response was extraordinary, with contributions to this fund exceeding \$165,000. Our localities supported us by contributing over \$250,000 to our efforts from their CARES funding. Our COVID19 coalition task force and grants committee met regularly to review applications and award grants from the fund. We have continued to disperse COVID related funds well into 2021.

While few activities were normal in 2020, we attempted to maintain ongoing activities of the Foundation as best we could. The Foundation awarded over \$220,000 in annual grants to 78 area not-for-profits. We provided over \$25,000 in scholarships funds. In the 2020-2021 fiscal year, we made a record accomplishment by distributing a total of over \$660,000 into the communities we serve.

Donors created five new funds, bringing our portfolio of funds to a total of 72. At the end of the 2020-2201 fiscal year, assets of the Foundation totaled \$7.6 million, a 27% increase over the previous fiscal year.

Looking ahead, the Foundation will continue to offer multiple opportunities to assist in effective charitable giving. We hope that you will review your gift planning for the coming year and consider the benefits of creating a fund with the Foundation. The Foundation exists to enrich the future of Rockbridge, Bath and Alleghany Counties. We are here to help you play a part so that you can make an impact now and in perpetuity.

*For: A Turner*



Community Foundation  
for Rockbridge, Bath, and Alleghany Counties



**Lori Turner**  
*Foundation Executive Director*

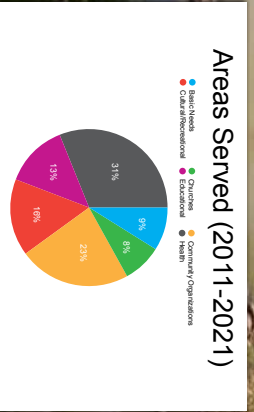
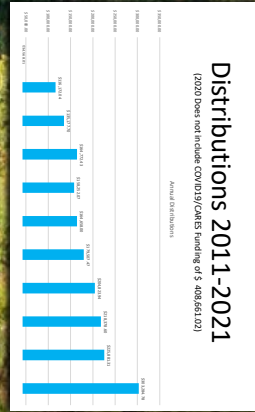
# Celebrating 20 years



The Community Foundation is celebrating 20 years in 2021, which includes ten as an independent foundation (CFRBA). Established in 2001 as the Rockbridge Area Community Foundation, we later became the Community Foundation for Rockbridge, Bath and Allegany in 2011. The support of many individuals, families, and businesses has had a tremendous impact on our growth.

After the Community Foundation became independent in December of 2011, we were able to make our first grants totaling \$32,000. After 10 years of community support and growth, we have been able to grant a cumulative \$2.5 million to nonprofit organizations, projects and programs across the Community Foundation's service area. In 2021, we will be awarding over \$300,000 in community grants and an additional \$30,000 in scholarships.

CFRBA has become a vibrant community foundation through the giving of those who establish funds for causes they support. Grants come from the more than 70 funds, primarily endowments, established by individuals, families, and businesses to support arts and culture, community betterment, education, health, and human services. This includes 36 Donor-Advised Funds, 2 Unrestricted Funds, 18 Agency Funds, 6 Designated Funds and 6 Scholarship Funds with assets which have grown to \$7.6 million dollars.



## Legacy Society

So many of you have been incredible champions for our community, giving through the Community Foundation for Rockbridge, Bath and Allegany for so many years! We know that you care about our friends, neighbors, and hometown. We also know you have other priorities – and you should! After making sure you have plans to pass something on to your loved ones, we hope you will consider leaving something behind for the community as well. We are starting a Legacy Society to celebrate 20 years of service to the community and would love to add you to the list! If you would like to learn more about how to direct your future giving in partnership

**Join the Legacy Society**

What is the Legacy Society?

It is a group of people who have made a commitment to support the Community Foundation for Rockbridge, Bath and Allegany through their will or a trust. This support helps us continue our work for the community.

Benefits of joining include:

- You can make a gift to the Community Foundation for Rockbridge, Bath and Allegany through your will or a trust.
- You can make a gift to the Community Foundation for Rockbridge, Bath and Allegany through a charitable deduction on your income tax return.
- You can make a gift to the Community Foundation for Rockbridge, Bath and Allegany through a charitable deduction on your income tax return.

For more information, please contact:

Lori Turner, Executive Director  
 Contact our Executive Director, Lori Turner, to learn more at [lori.turner@cfba.org](mailto:lori.turner@cfba.org) or by calling 540-463-0943.

## Legacy Society Members

- |                       |                             |                           |
|-----------------------|-----------------------------|---------------------------|
| Suzanne Blair         | Thomas & Carol Gosse        | Joanne Kobbler            |
| Buddy & Carol Bryan   | Ben & Carol Grigsby         | Scott Rochale             |
| Evelyn Caldwell       | William & Barbara Luton     | Woodson & Lorraine Sadler |
| David & Melissa Cox   | Fred & Sue (Whitist) Massey | Harriet "Patsy" Thomas    |
| Phillip Deemer        | George & Gail McLeod        | Pauline S. Turner         |
| Donald K. Lyle        | Clyde & Angelyn Moore       | Frances Williams          |
| Robert & Rene Glidden | George Phillips             |                           |

## Community Foundation Celebrates Anniversary



From left to right: Former Chairman Robert Glidden, "Co-Founder" Dan Vance, "Co-Founder" Woody Sadler, current Chairman Buddy Brian

During our Anniversary year, we recognized outgoing board member and former Chairman Robert Glidden. Awards were presented to Co-Founders Woody Sadler and Dan Vance for their vision, which made the Community Foundation a reality. Throughout this year, we look forward to sharing the stories of groups and individuals who have benefited from grants and scholarships, and we hope to celebrate and thank the many donors who have worked to better the lives of those in our communities and make our success possible.

# 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 FUND**

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.

## **BUDDY AND CAROL BRYAN FUND**

Established by Buddy and Carol Bryan to support charitable giving.

## **CAMP SPIRIT SCHOLARSHIP OF CAMP MONT SHENANDOAH FUND**

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

## **CARLTON 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 WOMAN'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, this fund provides college scholarships to Rockbridge County High School graduates.

## **ELDRIDGE & MARY PUTTZ FUND**

Donor-Advised Fund established by Eldridge and Mary Puttz.

## **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 fund higher education for 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.

## **HALESTONE DANCE ACADEMY FUND**

Agency fund to support Halestone Dance Academy.

## **HEALTHACCESS FUND**

Established by the Anne Hamilton Moore CRT.

## **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's mission.

## **JACQUELINE CORBIN PLEASANTS SCHOLARSHIP FUND**

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

# Current Endowed Funds

Continued from page 7



**JOMP JETS FUND - DONOR-ADVISED 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.

**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.

**MAVERCHAK FAMILY FUND**  
Donor-Advised Fund established by Patrick and Mary Jane Maverchak.

**MIMI & JOHN ELROD FUND**  
Established by Mimi Elrod to support educational purposes.

**MINOR FAMILY FUND**  
Established by Robert Minor to support charitable giving.

**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.

**RALPH & SUSAN CALDRONEY FUND**  
Designated Fund established to support the Rockbridge Area Habitat for Humanity.

**REED FAMILY FUND**  
Established by the late Olvia Reed to fund public, educational and charitable purposes.

**REGGIE & LORI TURNER FUND**  
Established in memory of Michael Turner for unrestricted 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.

**STU FUND**  
Established by Gail McLeod to support student activity costs for underprivileged youth.

**THOMAS FAMILY FUND**  
Established by Carlson and Patty Thomas for public, educational and charitable missions.

**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.

**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.

# The Blair Family Fund



Louis was the only child of a French artist and an American upper-class woman. His mother tragically passed away when he was five years old, and his father moved back to Paris after years of fighting for the French and escaping Germany as a prisoner of war. Louis's Aunt Jean raised him independently and with great care until he married Suzanne. As Louis wrote, he arrived at a wonderful state in his life because of these two extraordinary women and "a whole lot of luck."

“We had only been pals in school—but he remembered.” This was among the beautiful memories Suzanne Blair shared of her late husband, Louis. Twenty-five years after graduating high school together, Suzanne and Louis crossed paths at a local brunch. They married beside his small cottage in “The Baths” just two years later.

Growing up, Louis learned much in school. As he moved back and forth between Rockbridge Baths and Richmond, he always found himself ahead in the standardized curriculum. But one thing Louis never learned was to neglect those whom others tend to leave behind. This refusal to surrender the good from his past is what ultimately brought Suzanne and Louis together. It explains the long-lasting connections Louis held with those whom he met at various points in his life, including his fellow horseback riders and those he supported through his position as Executive Secretary at the Truman Scholarship Foundation. Because of the love these relationships fostered, Louis decided to retire in Rockbridge Baths. He continued his professorship at the Virginia Military Institute (VMI), where he loved to engage with those he taught and even create his own classes. But Louis wanted to do even more to give back to Rockbridge and his students. Re-miniscing, Suzanne shared that “the Community Foundation was a perfect fit.”

Though these women were extraordinary, Louis was not without his fair share of trials and tribulations. His Aunt Jean never had much money, so Louis lived close to abject poverty from an extremely young age. Regardless of their financial circumstances, however, Aunt Jean never failed to reach out to friends or neighbors who had less than them. One of her strongest traits, Louis recalled, was her immense generosity. She taught Louis through her actions that resources were for sharing. This spirit of service remained with Louis throughout his entire personal and professional life. It was because of his uncle's openheartedness that he was able to attend the University of Virginia. Louis wanted to pay this forward and, specifically, to help students in the Rockbridge community who would not otherwise be able to afford an education like the one he was grateful to receive. As a result, Louis and Suzanne started the Blair Family Scholarship through the Community Foundation. However, Louis didn't stop there—soon after, he opened a second scholarship fund to honor his beloved Pastor Fred Noll of the Bethesda McElwee Chapel in Rockbridge Baths. These scholarships continue Louis' legacy as they assist Rockbridge County High School students who exhibit financial need in affording higher education.

In an attempt to look back objectively on his life, Louis realized that he saved the best efforts in his career for last. He was not passionately devoted to his work until he arrived at the Truman Foundation and VMI, where he made lasting relationships, contributions, and memories. He began his journey as an orphan with expectations and grew to value all that he experienced, even managing to find bright moments during his cancer relapse in 2016. When beginning to list his regrets, Louis instead turned to consider what mattered most: choosing the ideal place to retire, being a loyal friend, taking care of his Aunt Jean, marrying Suzanne, and so much more. In the end, Louis had no regrets—just love in his heart and an immense legacy to leave behind.

## 20/20 Event

To Celebrate the 20th Anniversary we awarded twenty surprise grants of \$1000 each to 20 not for profit agencies over 20 days. The \$20,000 in grant awards was made possible by the Louis Blair Memorial Fund. Louis passed into his heavenly home in 2020 at the age of 81 and left behind an amazing legacy of accomplishments. His wife Suzanne, donated a portion of the memorial funds to the CERBA 20 Grants/20 Days event at CERBA.



Buddy Byson, CERBA Board Chairman awards one of the 20/20 grants to Judy Casteele, Executive Director of Project Horizon.



## 20/20 Event Grant Recipients

- Boxerwood Education Foundation
- Boys Home of Covington
- Christmas Baskets
- Friends of Natural Bridge State Park
- Hoofbeats Therapeutic Riding Center
- Hull's Angels
- Main Street Lexington
- Nature Camp
- Project Horizon
- Rockbridge Area Conservation Council
- Rockbridge Area Habitat for Humanity
- Rockbridge Area Health Center
- Rockbridge Area Hospice
- Rockbridge Area Relief Association
- Rockbridge Area Transportation System
- Rockbridge SPCA
- Rockbridge YMCA
- The Community Table
- United Way of Rockbridge
- Valley Program for Aging Services

# CFRBA Donors

FY 2020 - 2021

John Anfin	Bobby & Elizabeth Chittum	Mimi Elrod
John Averett	Grace Episcopal Church	Fred & Phyllis Fevter
Dennis Ayers	Lexington Presbyterian Church	Adam Eglo
Ana Cristina Pinto Bailey	Covington Woman's Club	MaryAnn Fleming
Bryan Balazs	Lexington Sunrise Rotary Club	Christian Fox
CornerStone Bank	Lexington Womens Club	Katly Pravel
Charles & Susan Barger	Margaret Dyson-Cobb	Thom Gill
Dennis & Nina Barnes	Dana Coddington	Thom & Lonnie Gill
Jeffrey & Kathleen Barnett	Rockbridge Area Democratic Comm.	Mary Stuart Gilliam
Dick Barton	Lexington Democratic Committee	Robert & Rene Glidden
Robert & Jan (Smith) Beirsack	James Constock	Thomas & Carol Gosse
James Bent	Christopher Connors	Jacqueline Gravitt
Charles Bentley	Malcom Cochran	Ben & Carol Grigsby
Joyce Benton	David & Melissa Cox	Anne Grimmer
Suzanne Blair	Lloyd Craighill	Pamela Grinder
Jeff & Audrey Boobar	Dennis Cropper	Steve & Frances Grist
John & Leslie Boyay	Sara Cunningham	Julia Grover
Wade & Elizabeth Brammer	Martha Daura	A.B. Hammond
Mountain View Brewery	Thomas Davis	David & Ann Hansen
Ellen Brock	Greg & Kelly Dean	Sandy Harcus
Jane B Broocke	Michelle DeCarr	Rene Hasey
Charles Brower	William DeVine	Dee Hayes
Donald & Kate (Kati) Brown	Donelle Dewitt	Amy Haysletc
Peggy Brown	Tyson Dickerson	Virginia Sue Hecht
Malcom & Sarah Brownlee	Robert Donely	Mary Helenberger
Rebecca Brownlee	Lackin Dudley	Tammy Helwig
Buddy & Carol Bryan	Marquita Dunn	Althea Henderson
Anne Riffney Buckner	Tamara DuVall	David & Ann Hensen
Ralph & Susan Calderoney	Danek Duval	Michele Hentz
Judy Castelle	Bruce Dwyer	Rae Hickman
CHEFS Catering	Joshua Eggleston	Avin & ernastine Hockaday
Lynn Chinn	Joshua & Fran Elrod	Helen Hodges

Julianne Hollingsworth	Mike & Pamela Minkler	Brian Steffel
Robert Holt	Robert Minor	Jane Stewart
Vernon Honsinger	George Marshall Chapter of MOAA	Walter Stone
Jay & Laura Hotel	Clyde & Angela Moore	Baron Swartz & Lynn Rainville
Robert Huch	Robert Moore	Fred Swope
Whitney Huffman	Sharon Mueller	University Tees
Anita James	Mary Murphy	Harriet "Party" Thomas
Roger & Sylvia Jeans	David Narkin	Pat Thomas
Christy Harris - Edward Jones	Cheryl Nester	Donald Thomas Jr.
Jim Jones	Natalie O'Dell	Patricia Tichenor
Martha Jones	Lenna Ojure	Russell Tompkins
Carol Karsch	Margaret Paxton	Reggie & Lori Turner
William Keese	Demaree Peck	Jeffrey Turner
Emily King	Ronald Perkins	Dan & KathleenVance
Ruth Kitchen	George Phillips	David & Courtney VanOsten
Linda Koch	Susan Piepho	David Wade
Pat Kovach	Katie Progne	Ross Waller & Ann Huebner
Katherine Lamb	Eldridge Putz	Mitch Wapner
Jacqueline Lauck	Elizabeth Ramsey	Harry & Sis Warner
Thomas & Anna Lawson	Paul & JoAnne Robblee	Carole M. Weinstein
Lai & Betsy Lee	United Way of Rockbridge	Domnie & Bonnie Wheatley
Main Street Lexington	Woodson & Lorianne Sadler	Lesley Wheeler
James & Jean Lossel	Paul & Ellen Satrom	Carol Wheeler
Rotary Club of Lexington Lunch	Marlou Schindler	Sarah Wiant
Bill & Barbara Luton	Elaine Sears	John Wilson
Greg & Kelly Madsen	Dr. Laura Simpson	Waller Wilson
Lawrence Martin	Harrison & Janice Skipwith	Sarah Wilson
Fred Massey & Sue Whitsit	Joe Stivora	Vernonia Winkler
Carla Mathes	Charles & Elizabeth (Knapp) Smith	Ben & Christian Worth
Patrick & Mary Jane Mayerchak	Billy Smith	Steven Yeakel
Ellen Mayock	Bruce & Jennifer Smith	Stephen Young
Bruce McDonald	Katherine Smith	Myra Young
Gail McLeod	Rockbridge Medical Society	Steve & Susan Young
Colquitt Meacham	Lucia Stanton	Eugene Zivver
Tara Miller	Bill & Laura Stearns	Gene Zivver



**Allyson DuVall** received a grant to support her new salon, inspired by Enhance Lexington, which opened at 9 S. Jefferson St. in the space occupied for several decades by Wendell Brown's barber shop. DuVall, an experienced beauty professional with a thriving salon in Salem, VA, is a native of Lexington with aspirations to open a cosmetology school in the area. She also owns and operates a beauty business consulting service. "I don't know how I'll ever find the words to express my gratitude, so instead I'll prove it by what I do, by reinvesting in the community of Lexington and its residents through mentorship, cosmetology education and entrepreneurship, business consulting while enhancing the opportunities and confidence of its residents through healthy hair care and image enhancing," said DuVall.



**Leonard Stewart's** Walker business grant will allow him to purchase equipment and market his new mobile car detailing service, Valley Pro Clean. Stewart, who works as the Director of Safety and Environmental Health for Carlton Rockbridge Community Hospital, has been dealing cars from his home. With the mobile unit deployed, he will be able to provide on-the-spot services around the county. "The Walker Program has helped me walk through the proper steps of starting a business and the grant will ensure that I am able to be well prepared for a sustainable future," said Leonard Stewart. "I look forward to the chance to help those who will come after me by helping them realize their dream of someday owning a successful business."

# THE WALKER Entrepreneurship PROGRAM

Train • Fund • Launch • Support



**Chandri Stewart** photographed newborns, newborns, and new graduates, generally out of doors. With the Walker Program grant, she opened a storefront studio stocked with props and lighting that will allow her client and herself to be less weather-dependent. Chandri Stewart added, "My favorite part about being in the Walker Program was being challenged by professionals who not only gave good advice but were hands-on leaders in this program."



**Justina Eason** is currently employed as the dispatcher at Rockbridge Area Transportation System, used her grant to launch her sideline business offering balloon bouquets, specialized events and other parties. "The best part of the Walker Program has been meeting people who are willing to help you work through each step and who stay with you afterwards," Eason said, citing the ongoing practical support offered by graphic designers, lawyers, marketing professionals and others as she worked toward her launch.

## Walker Program Launch Successful

Four local entrepreneurs were awarded a total of \$60,000 in small business grants in the first round of funding from the Harry Lee & Eliza Walker Entrepreneurship Program through the Community Foundation. Each of the awardees completed an eight-week business skills training course, crafted a business plan, and submitted a funding request to the Walker Program board.

The Walker Program is administered by a fifteen-member volunteer board with representatives from the small business community, civic and social organizations, educational institutions, and business training agencies. Since the launch of the program, fundraising efforts have attracted more than \$160,000 for the grant pool. More than 100 individuals have contributed to the fund, in addition to others who pitched in to communal offerings from church and civic organizations.

The Walker Program board remains committed to the task of ensuring adequate funding for all entrepreneurs who complete the training and whose plans are judged viable for as long as community support endures. The four grant awards announced mark the early achievement of the Walker Program's goal. Round two of training began in August, in hopes of seeing more businesses open in 2022.

## Walker Program Donors

2021	
Elizabeth Boetsch 50 Wey Rockbridge Frank A. Aleno Jr. Anonymous Stock Donation Liliana Arnold Jordan Arnold Dennis Ayers Traci Bidlo Joann Bboutin Matthew Boaz Eliott Brock Kirsta Volack-Radup Kara Buente Beverly Burtis Julie Dunn Campbell Casper Family Adoption Judy Casceie William Chase Rachel Clark Philip Coaling Sheryl Cox Sara Cunningham Jerry Darrell David & Ann Hansen Linda Dawson Karen Duff Tamara Duvall Reginald Early John Edwards Rosanne Escheido MaryJane Foley Mary Foley Natalie Garvis	Leah Giles Thom and Lorie Gill Good Shepherd Lutheran Church Grace Episcopal Church Christina Green Treston Greenawald Ben & Carol Groggby Grizzle Family Foundation Dana Guthrie Ellen (Satron) & Paul Hanstedt Stephanie Hardiman Jane Harrington Michelle Henz Beth Houser Al & Ernestine Hockaday Marc Hudson Winifred Kit Huffman Carol Jones Elizabeth Kain Elizabeth Kain Ruth Kitchon Julie Knudson Janet Kramer Jacqueline Larck Susan LeWert Lexington Church Rotary Lexington Presbyterian Church Ellen Mayock Irene Merchant Carmie Miller Linda Moreschi Fred Nickols Evelina Omilanowski
Aunt (Olson) & John Pancale Daphne Reaz Mark Reed Wendy Refern Paul & Joanne Robblee Karee Ryan Melissa Glendahl Sayre Jonathan Schwab Gail Scott Thani Sen Stephanie Simon Spencer Home Center Greer Stone Gretchen Subow Lynn (Rainville) & Barrow Swartz Lindsay Thousand Trinity United Methodist Church Reggie & Lori Turner David & Courtney VanOsten Virginia Military Institute Ann (Huebner) & Ross Waller Karen Waller Louise Ward Sarah (Hanz) & Anthony Wam Washington & Lee University Janean Welch Roger West Lesley Wheeler Adam Whipple Stephanie Wilkinson Sarah Wilson Lynn Yates James Zimmerman	



In March of 2020, the Community Foundation opened the COVID-19 Relief Fund. This Fund was able to distribute three rounds of grants to support businesses and not-for-profits adversely affected by the pandemic. In 2021, an additional round of funding was granted to organizations in need.



## 2021 COVID-19 Fund Recipients

- Line Kiln Theater
- Rockbridge Area Health Center
- Rockbridge Area YMCA
- Valley Program for Aging Services
- Yellow Brick Road Learning Center

## Health Access Fund



The Community Foundation created the HealthAccess Fund in 2021. The HealthAccess fund was made possible by the generosity of the late Anne Hamilton Moore. The mission of HealthAccess is to improve the overall health of our community by providing ready access to health care services for low-income, uninsured people in the areas we serve. The goal of HealthAccess is to fill the gap that exists between working individuals who earn too much for government programs like Medicaid, but not enough to afford independent health insurance.



## 2021 Scholarship Awards

- BLAIR FAMILY SCHOLARSHIP**  
Kaitlyn Showalter
- EDWARD F. TURNER SCHOLARSHIP**  
Grace Frascati
- CHARLES L. LAUCK SCHOLARSHIP**  
Jordyn Clemmer
- PASTOR FRED CHURCH OF THE BETHESDA MEELWEE SCHOLARSHIP**  
Kaitlyn Showalter
- LEXINGTON HIGH SCHOOL ALUMNI SCHOLARSHIP**  
Kaitlyn Showalter
- JACQUELINE CORBIN PLEASANT'S SCHOLARSHIP**  
Kaitlyn Showalter
- GEORGE C MARSHALL CHAPTER OF MOAA**  
Grace Wanovich
- COVINGTON WOMAN'S CLUB OF GFWC SCHOLARSHIPS**  
Madison Bennett (Covington High School recipient)  
Grace Conner (Alleghany High School recipient)
- Covington Women's Club Scholarship winners**  
Madison Bennett and Grace Conner



## Camp Scholarships

- CAMP MONT SHENANDOAH**  
— Financial Assistance for Campers
- NATURE CAMP**  
— Financial Assistance for Campers



# 2021 CFRBA Grant Recipients

DONOR-ADVISED- AGENCY AND UNRESTRICTED FUNDS

- |  |  |
|--|--|
| Allegheny Highlands Community Services | Lexington Woman's Club                     |
| Allegheny Highlands YMCA               | Main Street Lexington Science Festival     |
| American Cancer Society                | March of Dimes                             |
| American Heart Association             | Mary River Senior Center Meals on Wheels   |
| ARC of Rockbridge                      | Nature Camp                                |
| Blue Ridge Area Food Bank              | New Monmouth Church                        |
| Blue Ridge CASA for Children           | Parry McCluer Middle School                |
| Blue Ridge Legal Services              | Project Horizon                            |
| Boxerwood Education Foundation         | Rockbridge Area Disability Services        |
| Boy Scouts of America                  | Rockbridge Area Habitat for Humanity       |
| Boys Home of Virginia                  | Rockbridge Area Health Center              |
| Bridge to Hope Food Pantry             | Rockbridge Area Hospice                    |
| Brownshurg Community Association       | Rockbridge Area Relief Association         |
| Camp Mont Shenandoah                   | Rockbridge Area SPCA                       |
| CARE Rockbridge                        | Rockbridge Area Transportation System      |
| Christmas Baskets                      | Rockbridge Area YMCA                       |
| Community Closet at Christ Church      | Rockbridge CERT                            |
| Concerned Citizens of Glasgow          | Rockbridge Historical Society              |
| Covington Special Olympics             | Rockbridge Regional Library Youth Literacy |
| Effinger Volunteer Fire Department     | Rockbridge Retreat Project                 |
| English Speaking Union                 | SafeHome Systems Inc                       |
| Fine Arts of Rockbridge                | Salvation Army                             |
| Girls Scouts of America                | Samuel's Supper                            |
| Glasgow Fire Department                | Savannah County Day School                 |
| Glasgow/Natural Bridge Food Pantry     | Shenandoah Academy of Dance                |
| Glasgow Rescue Squad                   | St Jude's Research Center                  |
| Goodwill of the Valleys                | St Luke's Outreach                         |
| Grace Episcopal Church                 | St. John's Episcopal Church, Glasgow       |
| Hillsdale College                      | The Care-Box Project of Rockbridge         |
| Hootbeats Therapeutic Riding Center    | The Community Table of Rockbridge          |
| Hull's Drive In (Hull's Angels)        | Town Creek United Methodist Church         |
| Juvenile Diabetes Research Foundation  | United Way of Rockbridge                   |
| Kerr's Creek Volunteer Fire Department | Valley Program for Aging Services          |
| Lexington City Schools                 | Virginia Horse Center                      |
| Lexington Police Foundation            | Yellow Brick Road Learning Center          |
| Lexington Sunrise Rotary               |  |

## CFRBA Intern

Katie Yurechko is a sophomore (Class of 2024) studying Computer Science, Philosophy and Poverty Studies at Washington and Lee University. She was extremely grateful to join the Bonner Program at W&L during her Shepherd Summer Internship, which afforded her the opportunity to delve into the database migration process with the Community Foundation. "I found the experience extremely impactful, enlightening, and invaluable. CFRBA specifically helped me gain highly beneficial skills in database organization and management while strengthening my ability to communicate with and learn more about numerous community organizations. I am eager to continue my engagement with CFRBA as a database and marketing intern, taking part in the foundation's work is not only personally fulfilling but positively impactful in the community at large," said Katie.

Katie Yurechko



## Guest Bartender Night



Steve Grist



Our very own Steve Grist had a wonderful evening for Guest Bartender Night serving up drinks at the Southern Inn. Guests enjoyed appetizers and Steve's specialty drink "Grist on Main" for this event. Patrons were encouraged to "Tip Big." The proceeds supported the Rockbridge Unrestricted Fund Grants.



## 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.



Rockbridge Area Hospice



Bowenwood



Boys Home

## 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 for ensuring future cash flows in perpetuity.
- The establishment of an endowed fund at the Community Foundation remove the administrative burden of accounting for the funds 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.



### 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, 2021

### CURRENT ASSETS

CornerStone Operating	\$20,937.41
CornerStone Fund	\$ 231,500.69
Money Market	\$500,358.55
Marketable Securities	\$6,829,322.84

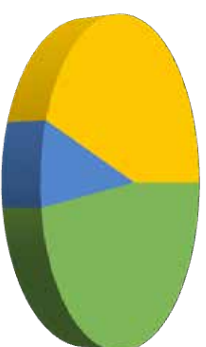
### TOTAL ASSETS

\$7,561,182.08



### FOUNDATION INVESTMENT PORTFOLIO

<span style="color: green;">■</span> United States Stocks	48%
<span style="color: blue;">■</span> Non-U.S. Stocks	7%
<span style="color: yellow;">■</span> 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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Scenic photos by Kelly Nye Photography

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