

— Annual Report —



Community Foundation
For Rockbridge, Bath, and Alleghany Counties

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

— 2021-2022 —

Our Board



Buddy Bryan
Chairman



Steve Grist
Vice Chairman



Thomas Gosse
Treasurer



Carol Grigsby
Secretary



Ralph Caldrony



Christy Harris



Barbara Luton



Greg Madsen



Robert Minor



Lynn Rainville



Joanne Robblee



Ben Worth

CFRBA Former Board Members

Michael Bozeman
David Cox
Joshua Elrod
Robert Glidden
Elizabeth Knapp
Kelly (Dean) Madsen
Mark Matheson
Sarah McWilliams
Charles Phillips
George Phillips

Susan Rabern
Bill Russell
Woody Sadler
Sallie Sebrell
Bryan Thompson
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Dan Vance
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Susan Whitsitt

RACF Former Board Members

Russell Elliott
Kimberly Hand
Helen Hodges
Elizabeth McCarthy
Clyde Moore
Jeff Pharr
Tom Silk
Joel Snow
William Stearns
George Warren

Thank you for your service!

From the Executive Director:

As the Executive Director at the Community Foundation for Rockbridge, Bath and Alleghany (CFRBA), it is with great pleasure that I present you with our FY 21-22 Annual Report. This report features the impact that The community foundation, our donors, and partners have had on our region. The stories highlight the importance of your support, and how it enables us to be responsive to all kinds of situations, represent our communities, and channel the real experiences of the people who need our help the most.

It is very humbling and gratifying to see so many individuals make the decision to become part of our CFRBA family of funds. It took our foundation ten years to reach over \$7M in assets. This has allowed us to grant \$3.4M from more than 80 funds to community programs, projects and efforts over the last decade.

This was a remarkable year of transformation and growth for the Community Foundation. We led the effort in Community Projects to increase our grant-making and address needs intensified by the COVID-19 pandemic. We supported black-owned entrepreneurship. We funded programs that allowed every school age family to receive a free holiday meal. We worked with our donors in so many ways to increase their philanthropic impact.

Our Community Foundation was created out of a few funds and the forward thinking generosity of individuals who wanted to make our community better. Over the last decade, we have grown from \$864,000 to total assets to over \$7 million. This didn't happen by chance or luck. The strength of our organization and the community itself lies in generations of generosity.

This year alone, we accomplished big things with the help of our community. We received \$1.2 million in gifts from generous individuals, organizations, and families. We awarded \$286,000 in grants to deserving nonprofit organizations in our service area. We helped individuals pursue their dreams by awarding over \$25,000 in scholarships. We funded the start-up of ten (10) new Black owned businesses.

We recognize that we are part of something bigger than ourselves. The work we do together is built on deep history and dedicated to a brighter future. Thank you for investing in our community, and we look forward to many more generations of positive change

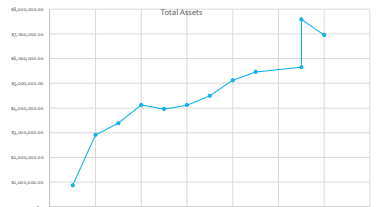
In summary, I want to say “thank you” on behalf of our board members and myself to our fund holders, donors, and advisors for the continued support received. CFRBA will continue to encourage donors to think outside the box, finding new ways to fulfill their passion and impact lives. Together, we will create great stories that will be their lasting legacy.



Lori Turner
Foundation Executive Director

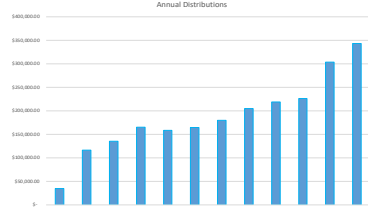
Our CFRBA Legacy

Total Assets 2011-2022



Distributions 2011-2022

(Does not include COVID19/CARES or Walker Program Funding)



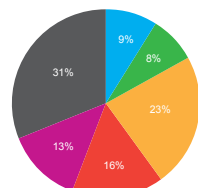
Total Distributions 2011-2022

\$3,423,471



Areas Served

Basic Needs Churches Community Organizations
Cultural/Recreational Educational Health



Legacy Society

So many of you have been incredible champions for our community, giving through the Community Foundation for Rockbridge, Bath and Alleghany 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 have formed a Legacy Society 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 with us, we would love to talk with you.

We work with estate planning attorneys, financial advisors, and accountants to assist them in facilitating your wishes. If you would rather talk to those trusted advisors first, and have them contact CFRBA, we can all work together to create your plan. Contact our Executive Director, Lori Turner, to learn more at lori.turner@cfbpa.org or by calling 540-463-0943.



Legacy Society Members Buddy Bryan, Melissa Cox, David Cox, Carol Grigsby, Suzanne Blair, Joanne Robblee, Carol Gosse, Thomas Gosse, Gail MacLeod, Lori Sadler, Woody Sadler.



Board Chairman Buddy Bryan Greets Legacy Society Guests



Legacy Society Members at our 2022 Appreciation Garden Party

Guest Bartender Night



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 speciality drink "Blackberry Bourbon Philanthropist" for this event. Patrons were encouraged to "Tip Big." The proceeds supported the Rockbridge Unrestricted Fund Grants.



Steve Grist



Legacy Society Members

2022

Suzanne Blair
Buddy & Carol Bryan
Evelyn Caldwell
David & Melissa Cox
Phillip Deemer
Donald K. Lyle
Mary Stuart Gilliam
Robert & Rene Glidden

Thomas & Carol Gosse
Ben & Carol Grigsby
Doug Harwood
William & Barbara Luton
Fred & Sue (Whitsitt) Massey
George & Gail McLeod
Rob & Su Minor
Clyde & Angelyn Moore

George Phillips
Joanne Robblee
Scott Rochelle
Woodson & Lorianne Sadler
Harriet "Patty" Thomas
Pauline S. Turner
Frances Williams

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 MONT SHENANDOAH DIVERSITY SCHOLARSHIP

Established by CMS to address diversity at the camp.

CAMP SPIRIT SCHOLARSHIP OF CAMP MONT SHENANDOAH FUND

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

CARLOS RUGGLES MEMORIAL FUND FOR THE PERFORMING ARTS

Established by Doug Harwood to support the Lime Kiln Theatre and other performing arts.

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.

COMMUNITY TABLE FOR ROCKBRIDGE FUND

Agency Fund established by the Community Table.

CONSTANCE B. MILLER MEMORIAL FUND

Designated Fund established by the estate of Constance B. Miller

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 PULTZ FUND

Donor-Advised Fund established by Eldridge & 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.

FRIENDS OF THE CHESSIE TRAIL FUND

Established by family and friends of the late Eliot Balazs.

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 local high schools 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 FOUNDATION 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.

JACLYN'S HOPE FUND

Established in memory of Jaclyn Hostetter to bring awareness to domestic violence in the healthcare setting.

Continued on page 8

Current Endowed Funds

Continued from page 7



JACQUELINE CORBIN DEMOCRATIC SCHOLARSHIP FUND

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

JOANNE ROBBLEE MEMORIAL FUND

Designated fund established by Joanne Robblee.

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.

MAIN STREET BUENA VISTA FUND

Established to support Main Street BV.

MARGARET C. DAVIS MEMORIAL FUND

Designated Fund established by the estate of Margaret C. Davis.

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.

MEALS FOR LEXINGTON FUND

Established by VPAS with support from the former Meals for Shut Ins.

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.

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 Olivia 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.

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.

STONEWALL JACKSON HOSPITAL AUXILIARY FUND

Established by the SJHA for scholarships in the medical field.

SOUTHERN VIRGINIA UNIVERSITY LATINO SCHOLARSHIP

Scholarship fund established to support Puerto Rican students attending SVU.

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.

Minor Family Fund



and also make contributions to the Community Foundation, utilizing their administrative and financial management for annual grant programs benefiting local charities in perpetuity.

“After many years of city life, we moved to Lexington in October 2019 and love the relaxed atmosphere, as well as the welcoming and diverse community and cultural and educational opportunities in the midst of the beautiful Shenandoah Valley.”

Before moving to Lexington from Nashville, Rob was Vice President-Development for the Behavioral Health Division of Universal Health Services and was involved in mergers and acquisitions totaling more than \$6 billion, as well as the development of much needed new hospitals, with a total number of behavioral beds in the U.S. exceeding 22,000. Rob has continued to facilitate the sale and acquisition of organizations in this crucial segment of national health care as a consultant. In the community, he serves on the vestry of Grace Episcopal Church and the Annual Funds Council at W&L.

Su’s work background includes experience in the fields of museum and hospital public relations and special events coordination and fundraising for independent schools. She is a member of the Board of the Historic Lexington Foundation and the Blue Ridge Garden Club.

When friends ask Rob “why Lexington?” an easy response is why not Lexington? It is a wonderful environment with many opportunities for social, recreational and civic involvement. As an alumnus of Washington & Lee University this area has always held a special place for Rob, and Su feels the same way as a Mary Baldwin graduate. They have been able to support W&L through annual gifts and the establishment of a Charitable Remainder Unified Trust (CRUT). “In the future, we plan to fund one through the Community Foundation to assist us in providing future gifts and bequests.”

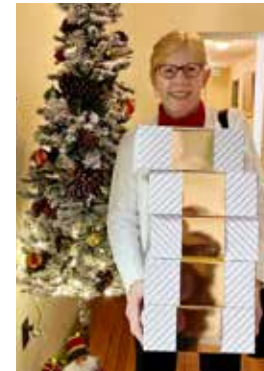
They know that the Community Foundation can assist them with strategic philanthropy in developing a flexible and functional approach to their philanthropy that will provide more structure for contributions to current and future recipient charitable organizations.

The Minor Family Fund was established in 2021 at the suggestion of a Community Foundation Board member following a conversation about how Rob and Su could become involved in their new community. They wanted to engage not only from a service perspective, but financially in supporting the various non-profit organizations in the area. After learning about the Community Foundation, its history, management and expertise as an effective and efficient means to support the community, they decided that a donor-advised fund under their stewardship would be an ideal way to achieve our philanthropic interests.

Through annual financial distributions from the donor-advised fund, they can contribute directly to organizations with charitable interests they support



Twelve Days of Donor Appreciation



The Community Foundation celebrated the holiday season, by delivering twelve Days of Donor Appreciation. We wanted to let those who generously give know how much we as the Community Foundation for Rockbridge, Bath and Alleghany wanted to celebrate THEM. We drew on the Twelve Days of Christmas for inspiration and created the Twelve Days of Donor Appreciation. Each of our donors who hold endowed funds with CFRBA received a package containing twelve unique gifts, each corresponding to a numbered day of gratitude.

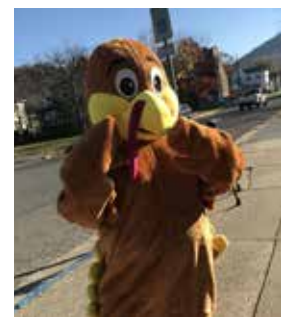
The Twelve Days of Donor Appreciation

- On the **first** day of Donor Appreciation, the Community Foundation gave to me... *hand Santa-tizer to keep me germ free.*
- On the **second** day of Donor Appreciation, the Community Foundation gave to me... *a coffee pod to bring me caffeine.*
- On the **third** day of Donor Appreciation, the Community Foundation gave to me... *Some nuts to snack on in my meetings.*
- On the **fourth** day of Donor Appreciation, the Community Foundation gave to me... *butterscotch lifesavers because I'm so sweet.*
- On the **fifth** day of Donor Appreciation, the Community Foundation gave to me... *a mounds bar for a special treat.*
- On the **sixth** day of Donor Appreciation, the Community Foundation gave to me... *an almond joy since I spread joy to all I meet.*
- On the **seventh** day of Donor Appreciation, the Community Foundation gave to me... *a fifty cent coin for holiday shopping.*
- On the **eighth** day of Donor Appreciation, the Community Foundation gave to me... *popcorn to eat during a movie.*
- On the **ninth** day of Donor Appreciation, The Community Foundation gave to me... *a pack of flower seeds for gardening.*
- On the **tenth** day of Donor Appreciation, the Community Foundation gave to me... *some gum to freshen my breath and protect my teeth.*
- On the **eleventh** day of Donor Appreciation, the Community Foundation gave to me... *a starburst since you can never have enough candy.*
- On the **twelfth** day of Donor Appreciation, the Community Foundation gave to me... *a special ornament to hang on my tree.*

Turkey Giveaway



The Community Foundation partnered with Rockbridge Area Relief Association, United Way, Campus Kitchen and area schools to provide Thanksgiving Meals to all families in the area. Due to the generosity of our donors the foundation provided \$10,000 to purchase all the turkeys for the event. The turkeys were supplemented with sides and desserts from the other partners of the project. Over 600 families were supported through this initiative.



CFRBA Donors

FY 2021 - 2022

Anne Hamilton Moore Estate	Raymond Conner	Thomas & Carol Gosse
George & Renata Anello	CornerStone Bank	Glenda Grasse
Asunder Coffee Roasters	Covington Woman's Club	Ben & Carol Grigsby
John Averett	David & Melissa Cox	Steve & Frances Grist
Helene Baker	Martha Daura	Pamela Grinder
Charles & Susan Barger	Devil's Backbone Brewing Company	Patricia Hammond
Bequest of Constance B. Miller	William DeVine	Dr. Sinclair Harcus
Bequest of Margaret C. Davis	Scott Dubit	Christy Harris- Edward Jones Investments
Bethesda Presbyterian Church	Dunn Family Charitable Foundation	Rene Hassey
Suzanne Blair	Danek Duvall	Rich and Susie Hastings
Matthew Boaz	Tamara Duvall	David and Audrey Hawkins
Gregory Brooks	Bruce & Linda Dwyer	Althea Kitola Henderson
Donald & Katie (Kain) Brown	Joshua Eggleston	Penelope Henneman
Malcom Brownlee	Joshua Elrod	Helen Hodges
Warren and Carol Bryan	Marvita Flint	Vernon Honsinger
Catharine Gilliam Burns	Christian Fox	Jay & Laura Hottel
Ralph & Susan Caldrony	Ramona Garcia	Beth Houser
Amber Camden	Thom Gill	Alicia Jean Jahsmann
Carilion Foundation	Mary Stuart Gilliam	Anita James
Carlson Foley Enterprises	Robert & Rene' Glidden	Elizabeth Jewell
Michele Clark	David Goodrich	

Ruth Kitchen	Cathy and Read McGehee	Rallie Snowden
Deb and Bill Klein	Mirabai McLeod	Southern Inn Restaurant
Gary Kohl	Colquitt Meacham	Leslie Straughan
Robert Kovach	Wade Meadows	Baron & Lynn (Rainville) Swartz
Lexington Chamber of Commerce	Robert & Su Minor	Elizabeth Tacy
Lexington Kiwanis Club Fund	Christina Moore	Jerry Tarver
Lexington Rockbridge Democratic Committee	Grigg and Cindy Mullen	James Tennant
Lexington Woman's Club	David Natkin	Donald Thomas
Hunter Louis	Sen Frank Nolen	Franklin Trice
William & Barbara Luton Jr.	John Page	Reginald and Lori Turner
Michael Lynn	John Pancake	Dan and Kathleen Vance
George and Gail MacLeod	Margaret Paxton	Dan Vance
Laurie Macrae	George Phillips Jr.	Ross & Ann (Huebner) Waller
Greg & Kelly Madsen	Cristina Pinto-Bailey	Daniel Walz
Main Street Lexington	Mr & Mrs. Steven Riethmiller	Mitch & Cynthia (Downs) Wapner
James Manley	Anne Riffey-Buckner	Libby and Henry Weatherly
Marvin Dudley Logging	Tracey Holmes Riley	Lyn and Carol Wheeler
Beverly Mason	Paul and Joanne Robblee	Stephanie Wilkinson
Ann Massie	Woodson & Lorianne Sadler Jr.	Patte Wood
Ellen Mayock	Elaine Sears	Heather Wood
Molly McCluer	Martha Sherlin	Ben & Christian Worth
Stephen McElroy	Joseph Skivora	Stephen & Susan Young
	Alexia Smith	Eugene Zitver



Entrepreneur Teda Harden plans to open Blue Tulip Beauty Supply, a retail shop specializing in multicultural hair and beauty products, including wigs, extensions, hair tools, colors, and makeup. Her experience working in retail, her time in cosmetology school, and her years as the mother of five girls underpins her desire to fill a gap in the local market.

Teda Harden



Giving ... by Robin is a home-based manufacturer of keepsake soft toys made from items of clothing or other material with a sentimental value for the buyer. Robin Green began making "memory bears" following the passing of her mother in 2020, when she created a stuffed bear using a shirt her mother was particularly fond of. After a year of being inundated with requests for similar items from friends and acquaintances, she decided to turn her talent into a business.

Robin Green



Wind Chill Shaved Ice is a food truck concept developed by Jonathan Richardson. With the abundance of warm-weather events and venues in our area ranging from sports to breweries, community festivals and school gatherings, there is a market for a local provider of tasty frozen treats. Richardson plans to test the waters with a seasonal truck with an eye toward expanding into cold-weather offerings down the road.

Jonathan Richardson



Beauty 4 Ever is a salon that will be owned and operated by Tonika Watson, a licensed cosmetologist and holder of an associate's degree in business management. Watson currently serves clients as a stylist at one of the first Walker Program grant recipient businesses, Inspired To Enhance Lexington, and credits the support she received there with helping her hone her own vision, which will include the sale of private label hair care products.

Tonika Watson



Dina McIntosh's MannaVeda is a small-scale manufacturer of quality organic hair-care products made along ayurvedic principles. Three scalp nourishing and hair strengthening products comprise MannaVeda's initial product line, all using all natural ingredients like wild-harvested sea moss, saw palmetto and star anise. MannaVeda products will be available online and in select stores.

Dina McIntosh



Let's Do Lunch will provide a delicious option for casual party catering for groups up to 50 people. They offer a casual and fun approach for catered options. In addition to luncheons, the company also offers casual catering for any meal, including brunch, tea-time treats, or an hors d'oeuvres party. They aim to appeal to people who want a big step up from grocery-store party platters, but who are not in a position to spend hundreds of dollars on high-end caterers.

LaTonya Douglas



Staging Lanes Automotive Repair is the realization of a life-long dream by Brandon Fitz-Sloan, a die-hard car and truck enthusiast whose eighteen years of experience in auto tech spans time at a Ford dealership, training at Advanced Technology Institute in Virginia Beach, and a bundle of certifications in brake, suspension, engine and diagnostics, and more. Fitz-Sloan currently works as a diesel technician at Lee Hi Truck Stop. Staging Lanes will provide top-quality auto repair and preventative maintenance.

Brandon Fitz-Sloan



Tasha Coleman is trading in her job in daycare to focus on an already thriving sideline as a wedding and boutique portrait photographer. She is opening a space called Studio Create by Tasha Lamar Photography. In addition to providing a location for her own indoor photography, Studio Create will offer photography lessons to children and adults, styled shoots for fellow professional photographers, and seasonal mini-sessions like Santa shoots, maternity portraits, and kids' "unicorn shoots," as well as a venue for casual meetings and social events.

Tasha Coleman

Walker Program Announces Seven New Business Start-Up Grants



An automobile repair shop, a photography studio offering classes and events, and an all-natural hair-care product manufacturer are among the seven new start-up businesses

awarded grants through The Harry Lee and Eliza Walker Entrepreneurship Program. The Community Foundation serves as the fiscal agent for this successful initiative.

The Walker Program was established by a coalition of area organizations in the fall of 2020 to train, fund, and support Black-owned businesses in Buena Vista, Lexington, and Rockbridge County. The grant fund provides financial support to entrepreneurs who complete a ten week training program and whose business plans are deemed viable by the Walker Program board of directors.

Grantees have six months from the time of the grant award to register their business and obtain a business license and one year to access their funds, which are held by The Community Foundation and distributed as start-up costs are incurred.

In addition, entrepreneurs in the Walker Program have access to ongoing support and assistance in various areas of their start-up journey. Of particular note is their access to legal services made possible by an ongoing collaboration with students in the Washington and Lee Law School class of Prof. Carliss Chatman, a Walker Program board member. Students in the class researched trademarks, drafted operating agreements, and facilitated the filing of business formation paperwork with the state corporation commission.

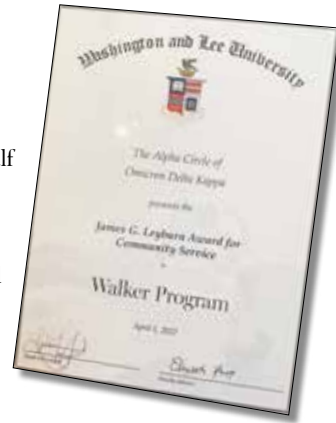
In 2022, the Walker Program established headquarters at 25 W. Washington Street and hired Gabrielle Cash as a part-time program coordinator. Following the most recent round of grants the program began offering continued training to Walker entrepreneurs in areas such as website creation, bookkeeping basics, social media strategies, and point of sale technologies.

Previous Walker Program grantees include: Chandi Stewart, Chandi Stewart Photography; Leonard Stewart, Valley Pro Clean Mobile Car Detailing; Justina Eason, Tina's Balloon Emporium; Allyson Davoll Cartwright, Inspired to Enhance Lexington; David Dunn, Head to Toe Memorial Services; Micah Henderson, Seasons Tow & Go; and Melissa Wooding, Coffee Corner by Let Them Eat Cake.

CFRBA Accomplishments



Stephanie Wilkinson and Lori Turner accepted the 2022 James G. Leyburn Award for Community Service from Washington and Lee University on behalf of the Walker Program. This award is given to a local organization that demonstrates outstanding community service. "We are honored to be selected for this award for continued work and efforts to bring black entrepreneurship to the Community," said Stephanie.



The Community Foundation Student Activities Fund (STUFund) was the beneficiary of the Balloons over Rockbridge annual grant this year. The STUFund enables financial assistance for High School students to participate in school activities, sports, field trips, arts, music, classroom projects and specialty classes. This fund was initiated by Lexington resident Gail MacLeod who has a long history as a volunteer literacy tutor. Her experiences provided insight on how kids can feel left out and chronically disengaged from their peers.



Buddy Bryan accepted a congressional record plaque from Congressman Ben Cline on behalf of 20 years of service to the community. The plaque recognizes the Community Foundation's growth and accomplishments made possible by the generosity of individuals and businesses who believe in our mission. Ben stated during his speech, "This work is truly inspiring and we thank them for their tireless efforts."



2022 Scholarship Awards

EDWARD F. TURNER SCHOLARSHIP
Miles Rudolf Zoellner

CHARLES L. LAUCK SCHOLARSHIP
Clara Fleshman

ERIC CHARLES BOWYER SCHOLARSHIP
Chelsey Lowry

LEXINGTON HIGH SCHOOL ALUMNI SCHOLARSHIP
Gage Clayton Kelly

JACQUELINE CORBIN PLEASANTS SCHOLARSHIP
Clara Fleshman
Gage Clayton Kelly

GEORGE C MARSHALL CHAPTER OF MOAA
Kinsie Paige Ellis

COVINGTON WOMAN'S CLUB OF GFWC SCHOLARSHIPS
Madison Bennett (Covington High School recipient)
Gracie Conner (Alleghany High School recipient)

STONEWALL JACKSON LADIES AUXILIARY SCHOLARSHIP
Ella Grace Vaught



Scholarship winners
Kinsley Sizemore and Cassy Evans.

Camp Scholarships

CAMP MONT SHENANDOAH
– Financial Assistance for Campers

NATURE CAMP
– Financial Assistance for Campers



2022 CFRBA Grant Recipients

DONOR-ADVISED- AGENCY AND UNRESTRICTED FUNDS

Alleghany Highlands
Community Services
Alleghany Highlands YMCA
ARC of Rockbridge
Blue Ridge Area Food Bank
Blue Ridge CASA
Blue Ridge Legal Services
Boxerwood Education Association
Boy Scouts of America
Bridge to Hope Food Pantry
Brownsburg Community
Association
Buena Vista Arts Council
Buena Vista City Schools
Campus Kitchen at
Washington and Lee
CARE Rockbridge
CarePortal for Foster Children
Concerned Citizens of Glasgow
Covington Special Olympics
Effinger Fire Department
English Speaking Union
Fine Arts in Rockbridge
Friends of Chessie Trail
Friends of Greenwood Cemetery
Friends of Natural Bridge State Park
Girl Scouts of Virginia Skyline
Glasgow Fire Department
Glasgow Natural Bridge Food Bank
Glasgow Public Library
Glasgow Rescue Squad
Goodwill of the Valleys
Grace Episcopal Church

Greater Rockbridge
Skateboarder Coalition
Half - Halt Equine
Helping Other People Excel, Inc.
Historic Lexington Foundation
Hoofbeats Therapeutic
Riding Center
Hulls Drive In Hulls Angels
Jaclyn's Hope
Juvenile Diabetes Research
Foundation
Kerr's Creek Fire Department
League for Animal Protection
Lexington City Schools
Lexington Police Foundation
Lexington Sunrise Rotary Club
Foundation
Lexington Woman's Club
Lexington-Rockbridge Juneteenth
Lime Kiln Theater
Lylburn Downing Middle School
Main Street Lexington
Maury River Senior Center-
Meals on Wheels
Mountain Gateway
Community College
Natural Bridge Volunteer
Fire Department
Nature Camp Foundation
Parry McCluer Middle School
Project Horizon
Rockbridge Area
Conservation Council
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 Program
Rockbridge CERT
Rockbridge Christmas Baskets
Rockbridge Historical Society
Rockbridge NAACP
Rockbridge Regional Library
Rockbridge Retreat Project
S.T.E.P.S at Grace Episcopal
Church
Safehome Systems, Inc.
Samuel's Supper
Savannah Country Day School
Shenandoah Ballet
St Luke's Church Outreach
Program
St. Johns Episcopal Church,
Glasgow
The Blue Ridge Mile (BRM)
The Community Closet
The Community Table
for Rockbridge
The Walker Entrepreneurship
Program
United Way of Rockbridge
Valley Program for Aging Services
Virginia Horse Center Foundation
Yellow Brick Road
Learning Center



Annual Grant Awardees for FY 21-22



Top row: Boxerwood Gardens, Rockbridge Area SPCA, Hoofbeats Therapeutic Riding Center. Middle row: The Community Table, Rockbridge Area Hospice. Bottom row: Rockbridge Area Relief Association, Alleghany Highlands Community Services, Rockbridge Area Health Center

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.



Halestone Dance Foundation



Rockbridge Area Conservation Council



Valley Program for Aging Services

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.



Establishing a Fund

Main Street Lexington Bike Parade

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, 2022



CURRENT ASSETS

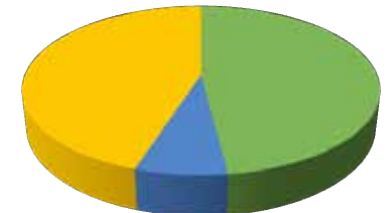
CornerStone Operating	\$12,184.95
CornerStone Fund	\$252,823.07
Money Market	\$501,296.64
Marketable Securities	\$6,181,052.32

TOTAL ASSETS

\$6,947,356.98

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.



CFRBA is a member of the Virginia Funders Network (VFN). This is a statewide membership association composed of more than 100 philanthropic organizations working to build a connected, collaborative philanthropic community that advances opportunities for all Virginians. Each year, members invest together to support Virginia's most pressing community needs in areas such as education, health, housing, economic vitality, and social justice. VFN enhances the effectiveness of their members' work through networking, collaboration, learning, and leverage.

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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