

*I have been instilled with the*

*conviction that wealth cannot be*

*measured in terms of money, stocks,*

ANNUAL REPORT 2002

*bonds, broad acres or by ownership*

## Community Foundations

Growing Philanthropy Close to Home

*of mine and mill. Only those who*

### CLAUDE WORTHINGTON **BENEDUM FOUNDATION**

*sustain the faltering ones on the*

*rungs above and extend a helping*

*hand to the less fortunate on the*

*rungs below can approach the end*

*with the strength of sublime faith*

*and confidence. It is our duty to sow*

*and to nurture, leaving it to others*

*to harvest the fruits of our efforts.*

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On the cover are excerpts from the fifth codicil to Michael Benedum's will, written by him in 1957 to communicate his ideas about philanthropy. Because they are broad and timeless, those ideas constantly inform the work of the Foundation while allowing us to respond effectively to the changing needs of those we serve. More excerpts from the codicil are on page 37.

**ABOUT THE  
CLAUDE WORTHINGTON  
BENEDUM FOUNDATION**

The Claude Worthington Benedum Foundation is an independent foundation established in 1944 by Michael and Sarah Benedum, natives respectively of Bridgeport and Blacksville, West Virginia.

The Foundation's policy is to allocate no less than five percent of the market value of its assets each year in support of its charitable activities, including the grants program. The Foundation's assets at year-end 2002 totaled \$289,541,141. Since its inception in 1944, the Foundation has made more than 6,300 grants totaling almost \$254,000,000.

## MESSAGE FROM THE PRESIDENT

Michael Benedum expressed his philosophy of philanthropy in poetic detail in the codicil to his last will and testament, which appears at the end of this report. But Mr. Benedum could summarize his philosophy in just four words—“helping people help themselves.”

At first glance, those four words seem almost simplistic, and Mike Benedum certainly is not the only philanthropist who has used them. However, throughout its history the Benedum Foundation has discovered no better guide in the challenging work of effective grantmaking than “helping people help themselves.” We therefore see our best role as leveraging not only funds, but also the interest, involvement, and commitment of the people we serve. We seek to maximize our impact both by encouraging local commitment and enhancing the ability of local communities to address needs beyond the grant priorities of the Benedum Foundation.

In 2000, the Foundation undertook its *Promotion of Philanthropy Initiative* to help increase the capacity of local communities to address their unique needs through higher levels of charitable giving and greater local civic engagement. The primary objective of this initiative is to help establish and grow community foundations, which are positioned to know their own communities—both the needs and the resources available to meet them—better than any external agency. The Benedum Foundation certainly has developed a good deal of knowledge about West Virginia and Southwestern Pennsylvania, but a foundation embedded in the community, which encourages both the giving and participation of local citizens, can do an unparalleled job at effectively prioritizing local needs and identifying the most appropriate local responses to those needs.

That is why we are providing strategic support to community foundations both in West Virginia and in rural Southwestern Pennsylvania, in partnership with other foundations, and especially with existing community foundations, which have demonstrated great enthusiasm and expertise in promoting the growth of such foundations throughout the region.

This annual report features a “primer” about community foundations: what they are, what they do, and how and why they do it. The report also includes donor stories drawn from six community foundations that are representative—in size, age, geographic distribution, and other ways—of the 23 in West Virginia today. We offer this report in the hopes that it will encourage continued growth and development of this vitally important asset in as many communities as possible.

## A Note About the West Virginia Grants Program

The description of the Foundation’s West Virginia Grants Program, which appears on page 26, is modified from prior years. Over a number of months concluding in June 2003, the Trustees and Staff of the Foundation conducted a complete review of the West Virginia Grants Program, resulting in the amended guidelines that are set forth. The intent of the Trustees in adopting these guidelines is to tighten the focus of the West Virginia Grants Program, in hopes of better achieving maximum impact with our limited resources. It is intended that, wherever appropriate, Foundation grants will relate to and build upon prior investments, so that related grants will be components of strategic initiatives with defined objectives and measurable outcomes. We also intend to develop, jointly with grantees, shared objectives for every grant, so that both we and our grantees can assess results more effectively, and learn better how to maximize the benefit of our shared work. In this endeavor, however, we mean never to lose sight of the fact that the Foundation has been most effective when it has responded to the creativity of others.



William P. Getty, President



*Turn the page to  
begin meeting some  
of West Virginia's  
community foundation  
philanthropists...*

Even in a robust economy, it's rare to earn a 300% return on an investment—but it happened in Beckley, and local Girl Scout programs are benefiting.

James W. Word Jr., Board President of the Dr. Thomas Walker Memorial Health Foundation, issued a challenge grant to the Beckley Area Foundation (BAF): the community foundation would receive \$550,000 if the community contributed an additional \$550,000.

Foundation Executive Director Susan Landis immediately notified local nonprofit leaders about the opportunity. Among them: Susan Thompson, CEO of the Black Diamond Girl Scouts Council. At a Finance Committee meeting, she proposed that the Scouts try to raise enough money to create a BAF endowment to benefit Girl Scouts in the Beckley area.

One Finance Committee member, Hunter M. Smith of Charleston, Vice President/Investments at Smith Barney, offered to contribute \$10,000 in appreciated stock—as an additional challenge. “I wanted to do this because I think both the Scouts and BAF are strong, effective organizations,” he explains. “I also think

## RISING TO THE

# CHALLENGE

encouraging others to donate is as important as donating ourselves.”

Enter Joey and Bekki Childress of Daniels, a Beckley suburb. Joey works in the coal processing industry, and Bekki is a retired realtor. At a Girl Scout fundraising meeting, the Childresses heard about Hunter Smith's \$10,000 challenge—and, Joey Childress recalls, “I said, ‘We'll take this. We'll get 100 people to contribute \$100 each.’”

And they did. They wrote a letter to the editor of the local paper, worked the phones, and drove around picking up checks. Bekki Childress says, “People liked the idea of making their money go farther through the challenge.”

By the Walker Challenge deadline, the Childresses had matched Hunter Smith's \$10,000, and the Walker Challenge matched that \$20,000 with another \$20,000—all of which was used to create a \$40,000 BAF endowment fund for the Girl Scouts.

The bottom line: a 300% return on Hunter Smith's contribution... and an endowment income stream that will fund new program opportunities for Beckley area girls.

*P.S.* The \$550,000 Walker Challenge was not only met but exceeded. Says Jim Word, “So many people get involved in meeting challenges. They're proud to see the community foundation thrive, and help good things happen close to home.”



*Hunter Smith, Jim Word, and Joey and Bekki Childress, philanthropists, with Girl Scouts from the Beckley area. The adults made and met challenges that created an endowment for the Scouts.*

**BECKLEY AREA FOUNDATION**



<b>CONTACT</b> Susan S. Landis <i>Executive Director</i>	<b>YEAR FOUNDED</b> 1985
<b>MAIL</b> 129 Main St. Suite 203 Beckley, WV 25801	<b>COUNTIES SERVED</b> Raleigh, Fayette, Wyoming, Summers
<b>PHONE</b> 304 253 3806	<b>NUMBER OF FUNDS</b> 220
<b>EMAIL</b> funds@beckleyareafoundation.com	<b>TOTAL FUNDS</b> \$13,975,792
<b>WEB</b> www.beckleyareafoundation.com	

# Community Foundations

## Growing Philanthropy Close to Home

### OVERVIEW

#### COMMUNITY FOUNDATIONS:

#### GENTLE START, EXPONENTIAL GROWTH

One of today's most powerful trends in charitable giving began in Cleveland, Ohio nearly 90 years ago, when the first community foundation was established. For decades, the numbers of community foundations climbed slowly—but during the 1990s, growth was exponential, and today there are more than 650 across the United States, with scores more around the world.

Twenty-three of America's community foundations are in West Virginia, and they serve 42 of the state's 55 counties.

What accounts for the phenomenal growth of community foundations?

Perhaps the most basic reason is that community foundations help people give where they live. Janet Topolsky, Associate Director of the Aspen Institute's Community Strategies Group, says, "A community foundation—particularly outside a metropolitan area—is in touch with its community in ways governmental or large private entities cannot be. Because it knows its local area, a community foundation can readily facilitate a donor's specific wishes, or help put the donor in touch with innovative, effective organizations the donor may not know about."

That's particularly true in cases where donors have moved away from an area. "Many West Virginia community foundations receive contributions from people who live away from where they grew up, but who want to do something good for that area," says Amy Owen, Executive Director of the West Virginia Community Foundations Consortium. (The Consortium provides leadership development activities, administrative and marketing tools, and opportunities to share information and experiences.) "Sometimes those donors aren't aware of nonprofit organizations working in the area; community foundations can provide that linkage."

#### No Bureaucracy, No "Remote Control"

Another appeal of community foundations is that they empower their communities. The endowed funds within a community foundation are a community's "nest egg," steadily producing income that can address a community's changing needs over time. "This is a way to help a local community control its own destiny; there's no bureaucracy, no 'remote control,' just local people making decisions about local needs," says Janet Topolsky.

"People get to see the impact of their contributions to a community foundation," adds Suzanne Feurt, Managing Director of Community Foundation Services for the Council on Foundations. "That's often more the case in a rural region than in an urban environment. You can more easily see where the dollars go and what they accomplish; that's powerful."

The West Virginia Community Foundations Consortium cites ten reasons people find it fulfilling to contribute through community foundations:

1. Community foundations build endowment funds that grow and benefit their communities forever.
2. They help create an individual or family legacy.
3. They offer donor involvement in selecting charities.
4. They are local organizations meeting a broad range of changing local needs.
5. They provide a simple way to fulfill multiple charitable interests, with low-cost administration.
6. They deliver personalized donor service.
7. They accept a wide variety of assets.
8. They offer maximum tax advantages.
9. They preserve donor intent even when community needs and organizations change.
10. They are known for prudent stewardship and investment practices.

#### How Can West Virginia Afford Philanthropy?

The theory is appealing—but the question is inevitable: how can West Virginia afford to contribute substantially to community foundations? Twenty-seven of the state's 55 counties are officially designated as "economically distressed," and nearly one in five West Virginians lives in poverty.

Janet Topolsky believes that the local nature of community foundations is an advantage. “There are resources in rural areas: people own land and businesses; they’ve made a living in various ways,” she says. “But without a community foundation, there have been few mechanisms for effective local giving.”

Joe Mattaliano, President of the Board of Directors of the Barbour County Community Foundation, agrees: “We have only 15,000 people in Barbour County, and still our community foundation is closing in on a total of \$1,000,000 in funds. Sometimes people have more resources than you might think. And most people have given money away at different times, but they’ve never seen results. This foundation provides a way to see results, right here at home—and to know it will go on forever. People respond to that.”

Across West Virginia, people are responding—and enthusiastically. The state’s community foundations are responsible stewards for nearly \$150,000,000 in donated funds—which in turn produce significant economic impact, pumping more than \$8,000,000 annually into their communities. Along the way, those community foundations have become local and regional facilitators and leaders, integral to the economic growth and quality of life of the communities they serve.

## CONTRIBUTING

### GIVING TO COMMUNITY FOUNDATIONS: WHO, WHAT, AND HOW

*An innovative project promotes cross-cultural understanding.*

*A senior center gets new exercise equipment.*

*Homeless people are served Thanksgiving dinner.*

*Deserving high school students receive college scholarships.*

Those are just a few of the purposes for which donors have created funds at community foundations across West Virginia. Across the state, donors have realized that giving to, and *through*, a community foundation is an excellent way to support purposes close to their hearts, give something back to their communities, and improve the local quality of life—all in a way that lasts forever.

But it’s not only individuals and families who are fueling the rapid growth of community foundations:

- Associations frequently set up funds at community foundations to support a particular cause. For example, alumni might create a scholarship fund for students from their alma mater.
- Often, a nonprofit organization will establish an endowment fund within a community foundation to produce a permanent, stable income stream for the organization—with all the administrative work performed by the community foundation.
- Businesses find that community foundations are a cost-effective alternative to setting up in-house company foundations, and a positive way to connect with their

## WHAT IS A COMMUNITY FOUNDATION?

A community foundation is a nonprofit, independent organization created by and for local citizens to benefit their community. The foundation builds a permanent collection of charitable gifts from a variety of sources, in amounts both large and small. The gifts are pooled and invested. Each year, earnings from the funds are returned to the community in the form of grants, scholarships, and other charitable distributions. The principal of the collection grows with each new gift, producing income that—for generations to come—will continue to meet local needs, build the community’s capacity to help itself, and improve the quality of life for all the community’s residents.

## COMMUNITY FOUNDATION OF THE OHIO VALLEY



CONTACT	Emily Schramm Fisher <i>Executive Director</i>	YEAR FOUNDED	1972
MAIL	P.O. Box 1233 Wheeling, WV 26003	COUNTIES SERVED	Ohio, Brooke, Wetzel, Tyler, and Marshall, WV; Monroe, Belmont, and Guernsey, OH
PHONE	304 242 3144	NUMBER OF FUNDS	80
EMAIL	director@cfov.org	TOTAL FUNDS	\$16,341,902
WEB	www.cfov.org		

In Malden, West Virginia, a small organization is working with a community foundation to help ensure the survival of a heritage craft.

The Cabin Creek Quilts Cooperative Association is a group of 25 women who create extraordinary work, including heirloom-quality bed quilts in traditional patterns with evocative names such as “crazy patch” and “lone star.” Several celebrities and former U.S. Presidents own Cabin Creek quilts—as does the Benedum Foundation, which has made grants to the Association.

Each year, Cabin Creek’s members produce about 40 large quilts and 75 crib quilts. “Everyone enjoys the work,” says Cabin Creek Director and Production Manager Sharon Ford, “but it’s not a hobby; this is done for supplementary income.”

Large quilts sell for \$700 to \$1080, and crib quilts for \$140—bargain prices considering the labor invested: creating a bed quilt typically takes between 140 and 180 hours.

Cabin Creek works hard to optimize revenue. At the old Malden house that’s both salesroom and offices, the Association offers not only large quilts but myriad

## SEWING UP

# THE FUTURE

small quilted pieces, including dolls and ornaments, for as little as \$1.50. And some Cabin Creek quilts are made available on the web (at [www.mountainmade.com](http://www.mountainmade.com)).

But one major step toward securing the Association’s future came in 1995, when Cabin Creek created its own \$10,000 agency endowment fund with the Greater Kanawha Valley Foundation. With an agency endowment fund, the organization receives, and decides how to use, income from the fund’s invested principal. The savvy ladies of Cabin Creek use their fund’s income to buy locally made products to sell in their store: mostly jams and jellies, and books by West Virginia authors; cookbooks are among tourist favorites. The purchases made by Cabin Creek help the local economy—and selling the products at retail prices helps Cabin Creek. Proceeds are used to buy quilting supplies and to defray other expenses necessary to keep the organization—and the craft—viable.

“\$10,000 is a lot of money, and I have to admit that sometimes we wish we had the use of it,” says Shirley Boggess, Cabin Creek’s Deputy Director and Bookkeeper. “But the endowment will always be there to help support what we do. It’s good to know that, and we look forward to the check every year. It’s important to us, because we want Cabin Creek to be around for a long time.”



*Sharon Ford and Shirley Boggess, philanthropists. Their Cabin Creek Quilts Cooperative Association created an endowment to help ensure the survival of a heritage craft.*

**THE GREATER KANAWHA VALLEY FOUNDATION AND AFFILIATES**



<b>CONTACT</b>	Becky Cain <i>President and CEO</i>	<b>YEAR FOUNDED</b>	1962
<b>MAIL</b>	P.O. Box 3041 Charleston, WV 25331	<b>COUNTIES SERVED</b>	Kanawha, Fayette, Clay, Putnam, Boone, Lincoln
<b>PHONE</b>	304 346 3620	<b>NUMBER OF FUNDS</b>	362
<b>EMAIL</b>	tgkvf@tgkvf.org	<b>TOTAL FUNDS</b>	\$88,770,489*
<b>WEB</b>	www.tgkvf.org	<i>* Includes funds designated as affiliate-assigned</i>	

communities. A business creates a fund in the company's name, and recommends uses of the monies. Often those uses relate to the company's work—a car dealership, for instance, might support safe driving programs, or a real estate agency might support programs to improve public spaces. The community foundation keeps the business informed about local needs and opportunities related to the company's priorities, handling the administrative and grantmaking processes on the company's behalf, and making grants in the company's name.

- Increasing numbers of private foundations are placing their resources with community foundations. The private foundations can keep their names, boards, and grantmaking purposes intact while reducing paperwork and administrative duties.

#### How Much Do People Give?

That's perhaps the question most often asked of community foundations, and the answer is simple: people give whatever amount is appropriate—for what they wish to accomplish with their contribution, and for their budgets (the average American household contributes 2.1% of its annual income to charity). There is no fixed "cost of admission" for becoming a philanthropist.

Not long ago, people in Beckley initiated a community foundation fund to commemorate a well-respected man who had recently died. A small girl, not wanting to be left out, emptied her piggy bank and contributed 22 cents. She is a philanthropist.

So, too, is the woman who honored her late husband by creating a fund of approximately \$8,000,000 in his name at the Tucker Community Endowment Foundation. The fund benefits the local library, parks, and cemetery, and the people in the town of Parsons.

Most contributions, of course, are somewhere in between.

Donations to funds already in existence at community foundations are welcome in any amount; foundation staff members are always willing to talk with donors about how their contributions would be most effective.

The minimum level needed to create a separately named charitable fund ranges from \$5,000 to \$10,000. Most community foundations have a procedure for creating "building funds" so that donors can build their funds to the minimum over a period of years.

A donor who establishes a fund can name it and stipulate the fund's charitable purposes. Many people name funds in honor or memory of beloved family members or friends. Depending on the type of fund, donors can be highly involved in recommending grants. Donors can, if they choose, remain anonymous, although most permit their names to be made public in order to encourage others to create funds.

Because community foundations are public charities, donations qualify for maximum deductibility for income, gift, and estate tax purposes. In addition, West Virginia's Neighborhood Investment Program allows individuals and businesses donating to qualified programs (including

#### COMMUNITY FOUNDATION OF THE VIRGINIAS



<b>CONTACT</b> Deanna S. Puckett <i>Executive Director</i>	<b>YEAR FOUNDED</b> 1993
<b>MAIL</b> P.O. Box 4127 Bluefield, WV 24701	<b>COUNTIES SERVED</b> Mercer, WV; Tazewell, VA
<b>PHONE</b> 304 324 0222	<b>NUMBER OF FUNDS</b> 32
<b>EMAIL</b> bla00684@mail.wvnet.edu	<b>TOTAL FUNDS</b> \$1,532,660

#### DODDRIDGE COUNTY COMMUNITY FOUNDATION

*Affiliate of Parkersburg Area Community Foundation*



<b>CONTACT</b> Foundation Services Representative	<b>YEAR FOUNDED</b> 2000
<b>MAIL</b> P.O. Box 92 West Union, WV 26456	<b>COUNTY SERVED</b> Doddridge
<b>PHONE</b> Toll-free: 866 428 4438 In WV: 304 428 4438	<b>NUMBER OF FUNDS</b> 5
<b>EMAIL</b> info@pacfwv.com	<b>TOTAL FUNDS</b> \$54,115
<b>WEB</b> www.pacfwv.com/ Doddridge_County_Community_Foundation.htm	

approved community foundations) to receive up to 50% of the contributed amount in state tax credits. In other words, a \$1,000 donor may have his or her tax bill reduced by \$500.

Judy Sjostedt, Executive Director of the Parkersburg Area Community Foundation and its four regional affiliates (collectively known as Our Community's Foundation), says, "It's worth noting that this is not a deduction; use of the credit results in an actual reduction of donors' taxes."

In addition, many businesses offer to match employee contributions to community foundations and other nonprofits—sometimes dollar for dollar; that's another way to maximize a donation.

#### What Types of Funds Does a Community Foundation Manage?

Most funds at community foundations are *endowments*.

With an endowment, the foundation invests the principal, and uses a portion of the fund's earnings to make grants in accordance with the fund's purpose. The principal remains intact, permanently available to generate resources.

Some community foundations also hold "*pass-through*" funds, in which both the principal and earnings are available for grantmaking. People sometimes create pass-through funds to support a one-time community project, or to make significant resources available for unusual community needs such as flood relief.

All funds are categorized as either "unrestricted" or "restricted." *Unrestricted funds* allow the community foundation's Board to determine what causes the funds will

serve. Unrestricted funds are often the basis of a community foundation's ability to offer a competitive grantmaking program. And, as the community's needs inevitably change, unrestricted funds permit the flexibility necessary for the community foundation to respond efficiently and effectively.

With *restricted funds*, the general or specific causes to be supported are determined by donors at the time the funds are created. There are several major types of restricted funds.

- With *donor-advised funds*, donors are actively involved in how their funds are used, working closely with community foundation staff. Donors can specify the level of involvement they wish, even reviewing grant applications and making recommendations to the foundation's Board about which to fund. Donor-advised funds have become increasingly popular at community foundations across the country.
- *Field-of-interest funds* support projects in subject areas the donors specify—for example, health, arts and culture, education, or historic preservation. The field of interest can be broad (for instance, "children") or narrow (for instance, "recreational opportunities for preschool children with disabilities").
- *Designated funds* directly benefit one or more specific nonprofit organizations of the donors' choosing—perhaps a college, a senior citizens' center, or a church.
- *Agency endowments* are created by nonprofit organizations or their supporters to assure a permanent income stream to support operating costs or agency programs. Some community foundations, for instance, hold endowments for their local United Way organizations.

#### FOUNDATION FOR THE TRI-STATE COMMUNITY



CONTACT	Mary Witten Wiseman Executive Director	YEAR FOUNDED	1972
MAIL	P.O. Box 645 Ashland, KY 41105-2096	COUNTIES SERVED	Cabell, Mingo, and Wayne, WV; Boyd and Greenup, KY; Lawrence, OH
PHONE	606 324 3888	NUMBER OF FUNDS	102
EMAIL	ftsc_mwwiseman@yahoo.com	TOTAL FUNDS	\$12,962,702
WEB	www.tristatefoundation.org		

#### THE GREATER GREENBRIER VALLEY COMMUNITY FOUNDATION Affiliate of the Greater Kanawha Valley Foundation



CONTACT	Sally Cooper Managing Director	YEAR FOUNDED	1999
MAIL	P.O. Box 387 Lewisburg, WV 24901	COUNTIES SERVED	Greenbrier, Pocahontas
PHONE	304 645 5620	NUMBER OF FUNDS	14
EMAIL	tggvcf@citynet.net	TOTAL FUNDS	\$254,828
WEB	www.greenbriervalleycommunityfoundation.org		

With fewer than 3,000 residents, the Barbour County town of Philippi is small enough that people know each other pretty well—and they know the organizations that keep the town safe and enhance the quality of life.

Ruth and Harold Shaffer have lived most of their lives in Philippi. Joe Mattaliano, President of the Board of the Barbour County Community Foundation, says, “I’ve known them a long time, and they’re quite a couple—in their 90s and still active and interested.”

For years, the Shaffers had their savings in banks, and donated the interest to local organizations. “We always felt the community had been good to us, and we liked giving something back,” says Ruth Shaffer.

When the Community Foundation was launched in 1997, it offered a new route to charitable giving for the Shaffers. “Harold and I discussed the idea of an endowment, and we liked it,” Ruth Shaffer recalls. “It would be there for generations, so the organizations we want to support would have some income they could count on permanently. Also, the Foundation would handle the investments

## SUPPORTING

# WHAT MATTERS

as well as the processing of our fund’s recommended grants, and that’s much more convenient for us.”

The Shaffers created their \$105,000 endowment as a donor-advised fund, directing that specific portions of its income be distributed among certain organizations that are important to the couple.

Among them: the Barbour County and Tucker County libraries, 4-H, the Adaland Mansion (a local site on the National Register), the Barbour County Senior Citizens (where both have been leaders—Mrs. Shaffer still walks to the Senior Center every day), and the Philippi Volunteer Fire Department. “Thank goodness we’ve never needed their services ourselves,” says Ruth Shaffer about the VFD, “but it’s so good to know they’re there. They do fine work.” VFD Assistant Fire Chief Bob Byrne says, “No doubt about it, that annual check is welcome. We try to stay current with our equipment and training, and Mr. and Mrs. Shaffer’s support is a big help.”

Ruth Shaffer sums up the situation by saying, “Harold and I are glad the foundation is doing well. It helps people like us help our communities do things they couldn’t otherwise afford.”



*Ruth Shaffer,  
philanthropist,  
with members of the  
Philippi Volunteer  
Fire Department.  
Mrs. Shaffer and  
her husband created  
an endowment that  
benefits the VFD  
and other local  
organizations.*

**BARBOUR COUNTY COMMUNITY FOUNDATION**



CONTACT	Joseph P. Mattaliano <i>President</i>	YEAR FOUNDED	1997
MAIL	Rt. 3, Box 38M Philippi, WV 26416	COUNTY SERVED	Barbour
PHONE	304 457 3370	NUMBER OF FUNDS	32
EMAIL	jpmat@bcnetmail.org	TOTAL FUNDS	\$750,000

- Donors who create *scholarship funds* can specify criteria by which recipients will be chosen. The criteria can be closely focused (naming a particular college, high school, or field of study, for instance) or more general.

**What Kinds of Gifts Can Community Foundations Accept?**

Many people choose to contribute via an outright gift: a check, cash, or credit card transaction. Those donors receive the maximum allowable tax deduction in the year the gift is made.

But, with a community foundation, donors have many other options. Among the possibilities:

*Gifts of assets*—for example, stocks, real estate, vehicles, art, and jewelry. With these gifts, it’s important to consult with the community foundation well in advance to ensure that the foundation is equipped to accept the gift and to complete the necessary paperwork. Most community foundations will sell or liquidate the gift quickly so that the gift can begin producing income for grantmaking as soon as possible.

“*Planned gifts*” are complex enough to require specialized support from a tax attorney and a financial advisor in order to determine the most appropriate planned-gift instrument. A number of planned gifts can generate life income for donors or members of donors’ families. In this category are *charitable gift annuities*, *charitable remainder trusts*, and *charitable lead trusts*. Other planned gifts include *charitable bequests* (appropriate for estates of any size), and designating a community foundation as a *life insurance beneficiary*.

Community foundations are always willing to work with donors and donors’ financial advisors to help ensure that the process of contributing is comfortable and convenient—whatever the amount, type, and purpose of the donation.

Suzanne Feurt, Managing Director of Community Foundation Services for the Council on Foundations, says, “Community foundations are extraordinarily flexible—in the types of funds they can create, in the kinds of contributions they can accept, in the ways they can work to make grants. Community foundations exist to help donors achieve their charitable dreams—whatever those dreams are.”

The results of those dreams are showing up every day across West Virginia as local people contribute resources to help their communities thrive—now and in the future.

GOVERNANCE

**COMMUNITY FOUNDATIONS:  
RESPONSIVE, RESPONSIBLE STEWARDS**

West Virginia’s community foundations are highly individualized—in their stages of development, sizes, geographic coverage, and more.

But they have much in common, including formal and informal supports to ensure that they stay “in sync” with their communities and fulfill their missions ethically, efficiently, and effectively.

Community foundations are regulated by the Internal Revenue Service. They are public charities whose books are open to public scrutiny, and whose Boards of Directors are

**THE GREATER MADISON-DANVILLE AREA COMMUNITY FOUNDATION**  
*Affiliate of the Greater Kanawha Valley Foundation*



CONTACT	YEAR FOUNDED
Amy Brown Managing Director	2001
MAIL	COUNTY SERVED
P.O. Box 695 Madison, WV 25130	Boone
PHONE	NUMBER OF FUNDS
304 369 0511	3
EMAIL	TOTAL FUNDS
mdacf@shafferlaw.net	\$41,000

**GREATER MORGANTOWN COMMUNITY TRUST**



CONTACT	YEAR FOUNDED
Bill Coffindaffer Executive Director	2000
MAIL	COUNTIES SERVED
P.O. Box 409 Morgantown, WV 26507	Monongalia, Preston, Marion
PHONE	NUMBER OF FUNDS
304 296 3433	33
EMAIL	TOTAL FUNDS
gmct@gmctfoundation.org	\$690,100
WEB	
www.gmctfoundation.org	

required by law to be representative of their communities. Janet Topolsky of the Aspen Institute’s Community Strategies Group says, “The ‘DNA’ of a Board determines the tone and direction of the foundation; that’s why it’s important from the outset to have a Board that covers the community’s range of interests, professions, geography, ethnicity, and more. That’s the type of Board that will make sound judgments about its community and the community’s needs.”

**Unpaid — But Responsible**

Board members are always volunteers. But, although they’re unpaid, Board members are responsible for stewardship of the resources donated by the community. That means making sound investments and productive grants.

Young community foundations are generally administered by their Boards, not engaging paid staff until resources are available. That point often comes when a foundation’s endowment reaches approximately \$5,000,000.

The Tucker Community Endowment Foundation is one example. Until recently, it had assets of approximately \$850,000, and the Board handled all foundation operations. Then, last December, a local resident—Louise Harman of Parsons—died, leaving a bequest valued at approximately \$8,000,000 to the community foundation. “This is a wonderful opportunity for our area, and we are very grateful, but the paperwork is already overwhelming,” says Assistant Board Secretary Mariwyn McClain Smith. “When it’s time to begin making grants, it will be even more so; that’s why

we’re looking into hiring a staff person. We’re talking with other community foundations across the State about job descriptions, salaries, part-time vs. full-time, and so forth.”

For most community foundations, the first staff member to be hired is the executive director (titles sometimes vary, but that’s the most common). For others, however, a book-keeper or an office manager may be the first paid position. Later, as grantmaking becomes more complex, the program officer function—staying in touch with community needs in a particular subject area, reviewing grant applications, and making recommendations to the Board—is carried out by one or more paid staff.

When executive directors and staffs serve a community foundation, they manage day-to-day operations and make recommendations to the Board—but the ultimate responsibility for every aspect of the foundation’s work still rests with the Board.

**How Community Foundations Invest**

One major focus for a Board of Directors is investing the principal of the funds that reside with the foundation. Whatever banks and brokerages the Board works with, the objectives are the same: preserve the principal, grow it insofar as economic conditions permit, and maximize the dividend and/or interest income available for making grants. The Board closely monitors the progress of the foundation’s portfolio.

Community foundation Boards also determine administrative fees, which help cover costs associated with

**HINTON AREA FOUNDATION**



<b>CONTACT</b> Skip Mills <i>President</i>	<b>YEAR FOUNDED</b> 1992
<b>MAIL</b> P.O. Box 217 Hinton, WV 25951	<b>COUNTY SERVED</b> Summers
<b>PHONE</b> 304 466 5232	<b>NUMBER OF FUNDS</b> 27
<b>EMAIL</b> skipmills@stargate.net	<b>TOTAL FUNDS</b> \$1,411,980

**THE LINCOLN COUNTY COMMUNITY FOUNDATION**  
*Affiliate of the Greater Kanawha Valley Foundation*



<b>CONTACT</b> Judy Johnson <i>Community Coordinator</i>	<b>YEAR FOUNDED</b> 2002
<b>MAIL</b> P.O. Box 457 Hamlin, WV 25523	<b>COUNTY SERVED</b> Lincoln
<b>PHONE</b> 304 824 7990 x221	<b>NUMBER OF FUNDS</b> 0
<b>EMAIL</b> jjohn1021@aol.com	<b>TOTAL FUNDS</b> \$100

A few years ago, Parkersburg had no comprehensive resource that could link community services with people needing them and volunteers willing to help deliver them.

Longtime volunteer Jenny Keup saw the disconnect—and knew what would fix it. “We needed a central clearinghouse to address all those needs; not only individuals but this whole community would benefit,” she says.

So Jenny Keup started to build support for the clearinghouse. Grants from sources including the Parkersburg Area Community Foundation helped, VISTA volunteers pitched in, and, in 1996, the Volunteer Action Center (VAC) was launched.

The pace never faltered, and today the VAC, with support from the General Electric Elfun Society (a global organization of GE volunteers) and others, operates the Center for Community Service Agencies—13,000 square feet housing 15 nonprofit organizations in the historic Dils Center in downtown Parkersburg.

The VAC also links hundreds of volunteers with 90 community organizations,

## **BUILDING ENDOWMENTS, BUILDING** **COMMUNITY**

including FaithLink, one of several programs the VAC created and runs. (FaithLink’s faith-based volunteers provide services to elderly, disabled, and chronically ill people.) And VAC is a lead agency for the new West Virginia 211 line (whose funders include the Benedum Foundation), a central telephone information service that will direct people who urgently need help to appropriate agencies and organizations.

But Jenny Keup thinks about tomorrow as well as today. That’s why, from the VAC’s earliest days, she worked toward building an agency endowment for the VAC with the Parkersburg Area Community Foundation. “No matter how much you diversify your base of support, there’ll always be financial ups and downs. An endowment, with the principal remaining untouched and an income stream coming regularly to the organization, helps provide both stability and sustainability,” she explains. “It also sends a strong message to the community: this organization is a wise shepherd of its resources.” For those same reasons, FaithLink has also built its own endowment.

Along the way, Jenny Keup created a personal donor-advised fund at the Foundation. “At the time, I was a single parent with kids in college, but you don’t have to be wealthy to set up an endowed fund. And it’s a great way to give back, to stand up and be counted,” she says. “I think I’m living proof that a community foundation helps organizations and individual people do good things where we live.”



*Jenny Keup, philanthropist, in front of the Center for Community Service Agencies in Parkersburg. Ms. Keup spearheaded the development of the Center, and worked to build an endowment to help ensure its continuation.*

**PARKERSBURG AREA COMMUNITY FOUNDATION AND AFFILIATES**



<p><b>CONTACT</b>          Judy Sjostedt  <i>Executive Director,          PACF &amp; Regional          Affiliates</i></p> <p><b>MAIL</b>          P.O. Box 1762          Parkersburg, WV          26102-1762</p> <p><b>PHONE</b>          Toll-free:          866 428 4438          In WV:          304 428 4438</p> <p><b>EMAIL</b>          info@pacfwv.com</p> <p><b>WEB</b>          www.pacfwv.com</p>	<p><b>YEAR FOUNDED</b>          1963</p> <p><b>COUNTIES SERVED</b>          Wood, Wirt, Calhoun,          Pleasants, Ritchie,          Doddridge, Gilmer,          Roane, and Jackson,          WV; Washington, OH</p> <p><b>NUMBER OF FUNDS</b>          262</p> <p><b>TOTAL FUNDS</b>          \$9,900,000*</p> <p><i>* Includes funds          designated as          affiliate-assigned</i></p>
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staffing and the extensive paperwork entailed by accounting, tax filing, and grantmaking. Those fees are generally based on a fund's market value, and are typically around 1%. A foundation with \$5,000,000 in assets would therefore collect fees of approximately \$50,000 toward meeting its administrative needs.

"I think that, for the administrative fee, we donors receive much more than we're paying for," says Jenny Keup, Executive Director of the Volunteer Action Center in Parkersburg. She has created agency endowments and a donor-advised fund with the Parkersburg Area Community Foundation, and she believes that "the 1% buys a fiscal manager, a grants advisor, marketing, and many other services. It's a real bargain."

#### How Much in Grants?

How much of its assets does a community foundation distribute in grants? The IRS does not require community foundations to follow the 5% rule mandated for private foundations—but, in fact, most community foundations do make annual distributions in the 5% range.

Most Boards create formal spending policies. The Greater Kanawha Valley Foundation, for example, annually makes grants totaling 5% of the average market value of its assets for 20 trailing quarters (in essence, the previous five years).

Creators of donor-advised funds are encouraged to be involved in the grants process, if they wish—for example, by reviewing grant applications and making recommendations

about which to fund—but the ultimate responsibility is the Board's. Whatever grants are made are always in accordance with each fund's stated purpose; that's a legal obligation resting with the Board. Donors can be assured that the funds they set up—for instance, to benefit the Senior Center or the local conservation agency—won't be diverted to other purposes.

But because endowed funds are permanent and continue their good work through generations, the regulations permit flexibility when circumstances require it, giving "variance power" to community foundations. A variance authorizes a Board to modify donor restrictions when "unnecessary, incapable of fulfillment, or inconsistent with the charitable needs of the community." For instance, when a fund exists to help find a cure for a disease, and the disease is eradicated decades after the donor's death, the variance power allows the Board at that future time to redirect distributions to a related or similar purpose.

#### Affiliates: Local Input, Local Results

When a community foundation's service area spans multiple counties, the foundation sometimes creates "affiliates"—locally based organizations that have their own Boards and fundraising and grantmaking activities, but that are integrated into the parent foundation for cost-effective administrative services. An affiliate doesn't have to file for its own nonprofit 501(c)(3) status.

In West Virginia, the Parkersburg Area Community Foundation (PACF) pioneered the affiliate concept in 1999.

#### LOGAN COUNTY CHARITABLE & EDUCATION FOUNDATION



CONTACT	Martha Becker <i>President</i>	YEAR FOUNDED	1997
MAIL	P.O. Box 1367 Logan, WV 25601	COUNTY SERVED	Logan
PHONE	304 752 6848	NUMBER OF FUNDS	9
EMAIL	pcwin@bellatlantic.net	TOTAL FUNDS	\$834,277

#### MARION COUNTY FOUNDATION



CONTACT	Gary Jack <i>President</i>	YEAR FOUNDED	2001
MAIL	1310 Fairmont Ave. Fairmont, WV 26554	COUNTY SERVED	Marion
PHONE	304 367 3423	NUMBER OF FUNDS	3
EMAIL	gjack@alleghenyenergy.com	TOTAL FUNDS	\$25,000

With early staffing support and technical assistance provided by the Benedum Foundation, PACF now has four affiliates: Ritchie County Community Foundation, Doddridge County Community Foundation, Pleasants Community Foundation, and Jackson County Community Foundation.

The Greater Kanawha Valley Foundation (TGKVF) has three affiliates, also with support provided by Benedum: Greater Greenbrier Valley Community Foundation, Greater Madison-Danville Area Community Foundation, and Lincoln County Community Foundation.

Judy Sjostedt, Parkersburg’s Executive Director, says, “We found a great sense of people wanting to build something to benefit their own local communities, just as the creators of the foundation here in Parkersburg did 40 years ago. The affiliate model is an efficient and cost-effective response to accomplish that desire.”

#### A “Good Housekeeping” Seal

As the community foundation movement gathers momentum across the country, so does the movement toward the adoption of a common and stringent set of national standards—in effect, a “Good Housekeeping”-style seal of approval for community foundations. While the IRS defines what’s required and legal for community foundations, national standards can define excellence.

The Washington, D.C.-based Council on Foundations worked with community foundation leaders to develop a set of standards, structured around Mission/Structure/Governance, Resource Development, Stewardship and Accountability,

Grantmaking and Community Leadership, Donor Relations, and Communications. (The standards are online at the Council’s website, [www.cof.org](http://www.cof.org); go to the Community Foundations area.)

Why did the Council and the community foundation group work to develop the standards? “This is a way to help ensure that community foundations are very good in all their processes and operations—effective, efficient, and accountable,” says Suzanne Feurt, Managing Director of Community Foundation Services for the Council.

The standards are still new; to date, four of West Virginia’s community foundations have fully adopted them: the Beckley Area Foundation, the Eastern West Virginia Community Foundation, the Greater Kanawha Valley Foundation and its affiliates, and the Parkersburg Area Community Foundation and its affiliates.

Others across the state are working their way through the requirements; it’s a challenge, especially for smaller foundations. Says Melody Jones, CPA, a member of the Barbour County Community Foundation’s Board of Directors, “In principle, we completely support the Council’s standards, and we want to comply with all of them. Some of the requirements are difficult in terms of time and cost, and we’re still small enough that we don’t have an executive director or staff.

“We’ll keep working on the standards—and, meanwhile, our Board always welcomes public scrutiny of our foundation’s operations. We’re working hard to help the people of Barbour County improve the quality of life here.”

#### MONROE COUNTY EDUCATION FOUNDATION



CONTACT	Judy Ellison <i>President</i>	YEAR FOUNDED	2002
MAIL	P.O. Box 330 Union, WV 24953	COUNTY SERVED	Monroe
PHONE	304 832 6624	NUMBER OF FUNDS	1
EMAIL	jellison@citynet.net	TOTAL FUNDS	\$10,000

#### PADEN CITY FOUNDATION



CONTACT	Rodney McWilliams <i>President</i>	YEAR FOUNDED	1987
MAIL	P.O. Box 233 Paden City, WV 26159	COUNTIES SERVED	Wetzel and Tyler
PHONE	304 665 3477	NUMBER OF FUNDS	18
EMAIL	rodney.mcwilliams@criterioncatalysts.com	TOTAL FUNDS	\$475,000

George Hancock of Martinsburg, Berkeley County, believes in the value of education, is a devoted member of his church, cares about his community's future—and dearly loved his wife.

He expresses those values through funds he has created with the Eastern West Virginia Community Foundation.

Eight years ago, Mr. Hancock, a retired YMCA executive, became the foundation's charter donor. He'd been approached by his longtime friend, Dr. Taylor Perry, and it wasn't long before he decided to begin the George and Holly Woods Hancock Scholarship Fund with a \$100,000 endowment. Soft-spoken and modest, he explains, "I wanted to help some young people as I myself was once helped, and I wanted to honor my late wife. This seemed like a fine way to do both."

Each year, the fund provides several college scholarships. At his own wish, Mr. Hancock leaves the awards process to the foundation, but he takes the recipients to dinner to celebrate, and to talk about their plans. To date, \$44,000 has been awarded—and the fund's principal remains intact.

## MAKING A DIFFERENCE WITH VALUES-GUIDED GIVING

It wasn't long before Mr. Hancock also created a designated fund to benefit his church, Mt. Zion United Methodist. The Rev. Alfred Statesman, Mt. Zion's pastor from 1982 to 2002, says, "We're a small congregation, and support for maintenance of the church was always a concern. Having funds come in regularly, being able to use them for our most pressing needs, and knowing that we would receive the support forever was most welcome."

Recently, Mr. Hancock agreed to contribute to the foundation's new "Endowment for the Community," an unrestricted fund that will produce income to meet various local needs.

Why does George Hancock choose to contribute through the community foundation? He answers, "This is a good foundation with a good Board. They're here to help this community, and I'm happy to help them do that."

And—although it's a delicate question—why does Mr. Hancock choose to contribute his support now, rather than later, as a bequest? He replies, "I wanted people to get the benefit sooner rather than later." Then he chuckles softly and adds, "And who knows? I might live to be 125..."



*George Hancock (right), philanthropist, with the Rev. Alfred Statesman, former pastor of Mt. Zion United Methodist Church. Mr. Hancock created an endowment to benefit the church.*

**EASTERN WEST VIRGINIA COMMUNITY FOUNDATION**



CONTACT  
Amy Owen  
*Executive Director*

MAIL  
P.O. Box 645  
Martinsburg, WV  
25402

PHONE  
304 264 0353

EMAIL  
aowen@ewvcf.org

WEB  
www.ewvcf.org

YEAR FOUNDED  
1995

COUNTIES SERVED  
Jefferson, Morgan,  
Berkeley, Hampshire,  
Hardy

NUMBER OF FUNDS  
30

TOTAL FUNDS  
\$1,220,852

FUTURE

**WEST VIRGINIA'S COMMUNITY FOUNDATIONS:  
BUILDING MOMENTUM**

West Virginia's community foundations are clearly building momentum: growing stronger, raising public awareness, increasing the amounts of funds contributed, and enhancing the quality of local life through grantmaking.

One vital statewide resource for the process is the West Virginia Community Foundations Consortium. For several years, an informal group of community foundation leaders provided support to each other and served as mentors to emerging organizations. Over time, it became clear that a more formalized collective approach could offer even greater benefits to individual foundations, could more effectively help grow philanthropy across the State—and could also present an attractive opportunity to regional and national funders, potentially enabling more significant projects.

Today's Consortium—with expanded reach and capabilities—is a strong model of regional partnership, leadership, and accountability. Its work is guided by a five-member elected committee of community foundation leaders from around the state, and supported by Executive Director Amy Owen, who also serves as part-time Executive Director of the Eastern West Virginia Community Foundation. The Consortium's services include delivering:

- Technical assistance to participating organizations and to citizens interested in starting up community foundations
- Training and education to support community foundations' volunteer and professional leadership

- Programs to raise endowment assets for West Virginia, and funds for Consortium-led initiatives
- Programs to increase awareness of philanthropic opportunities in West Virginia

Says Amy Owen, "We're here to support community foundations as they work to increase their capacity and to spark growth in philanthropy statewide. Members are already doing a considerable amount of peer teaching and learning, and that's a great way to promote best practices."

Susan Landis, Executive Director of the Beckley Area Foundation, adds: "It's so useful to be able to turn to a colleague and ask a specific question like, 'We're starting a newsletter, and I know you do one. Is it more cost-effective to produce it in-house or to send it out?' The exchange of ideas on every level is a real advantage—for all of us."

**Creating Productive Connections**

The Consortium, which receives Benedum Foundation support, has created productive connections with two national organizations that have expertise in issues vital to community foundations: the Council on Foundations and the Aspen Institute.

The Council on Foundations offers resources including marketing materials, specialized expertise (for example, in tax law), and a highly regarded three-day workshop, "Community Foundation Fundamentals." The intensive workshop covers issues vital to both emerging and mature community foundations—for example, fundraising, policies, standards, legal issues, marketing and outreach, and more.

**PLEASANTS COMMUNITY FOUNDATION**  
*Affiliate of Parkersburg Area Community Foundation*



<b>CONTACT</b>	Jane Young Foundation Services Representative	<b>YEAR FOUNDED</b>	2000
		<b>COUNTY SERVED</b>	Pleasants
<b>MAIL</b>	P.O. Box 420 St. Marys, WV 26170	<b>NUMBER OF FUNDS</b>	11
		<b>TOTAL FUNDS</b>	\$633,580
<b>PHONE</b>	304 684 3082		
<b>EMAIL</b>	jane.young@pacfwv.com		
<b>WEB</b>	www.pacfwv.com/ Pleasants_Community_Foundation.htm		

**RITCHIE COUNTY COMMUNITY FOUNDATION**  
*Affiliate of Parkersburg Area Community Foundation*



<b>CONTACT</b>	Foundation Services Representative	<b>YEAR FOUNDED</b>	1999
		<b>COUNTY SERVED</b>	Ritchie
<b>MAIL</b>	P.O. Box 178 Harrisville, WV 26362	<b>NUMBER OF FUNDS</b>	11
		<b>TOTAL FUNDS</b>	\$182,700
<b>PHONE</b>	Toll-free: 866 428 4438 In WV: 304 428 4438		
<b>EMAIL</b>	info@pacfwv.com		
<b>WEB</b>	www.pacfwv.com/ Ritchie_County_Community_Foundation.htm		

In 2003, the workshop was presented in San Diego, Denver, Dallas, Washington, D.C., Indianapolis, and—by special arrangement with the Consortium—Ripley, West Virginia. A grant from the Appalachian Regional Commission (ARC) supplied funds to support the course’s instructional costs, while the Consortium provided scholarships to help defray travel and lodging expenses for community foundation Board and staff members from across West Virginia.

The other national organization is the Aspen Institute’s Community Strategies Group. The Group operates the Rural Development Philanthropy Learning Network (RDPLN), which creates dynamic learning networks, workshops, and tools for community foundations in rural areas. Several of West Virginia’s community foundations participate in the RDPLN, and long-range Consortium plans include specialized services from Aspen.

With support from Verizon and the Verizon Foundation, the Consortium created a signature website for statewide philanthropy, [www.GiveToWestVirginia.org](http://www.GiveToWestVirginia.org), which includes listings of the state’s community foundations, information for potential donors and financial advisors, and other resources. Member foundations also use the site to share documents and best practices.

**Philanthropy Index = Objective Data + Collective Knowledge**

The Consortium is helping make available to community foundations an innovative tool developed by the Southern Philanthropy Consortium: the Philanthropy Index. The Philanthropy Index helps local leaders blend objective data

with the leaders’ collective knowledge about their area to assess the area’s potential to develop and promote local philanthropy.

For example, among objective data the Philanthropy Index assesses are levels of current charitable giving, population change statistics, and numbers of businesses. “Local knowledge questions” ask leaders about issues including the community involvement of existing nonprofits, and the levels of involvement of the community’s citizens.

The combined responses result in a “score” that reflects an area’s philanthropic potential.

“The Philanthropy Index is a helpful tool for community foundations,” says Amy Owen, “and the process itself, which requires community leaders to come together and talk about the future of the place where they live, poises a community to begin building the social capital that will help it grow and thrive.”

Future Consortium activities include development of in-depth marketing strategies and tools for local and statewide use; enhanced networking and partnering opportunities; and fundraising on behalf of all the state’s community foundations.

Becky Cain, President and CEO of the Greater Kanawha Valley Foundation, says, “I think the Consortium is useful today and will continue to be useful to all of us working in community foundations. It’s gathering critical information and making it available, along with a host of training opportunities.”

**TUCKER COMMUNITY ENDOWMENT FOUNDATION**



<b>CONTACT</b> Diane Hinkle <i>President</i>	<b>YEAR FOUNDED</b> 1989
<b>MAIL</b> P.O. Box 491 Parsons, WV 26287	<b>COUNTIES SERVED</b> Tucker, Grant, Preston, Randolph, Pocahontas, Barbour
<b>PHONE</b> 304 478 2930	<b>NUMBER OF FUNDS</b> 60
<b>EMAIL</b> dhinkle@access.mountain.net	<b>TOTAL FUNDS</b> \$8,800,000

**WEIRTON AREA COMMUNITY FOUNDATION**



<b>CONTACT</b> Dan Wilson <i>President</i>	<b>YEAR FOUNDED</b> 1985
<b>MAIL</b> 3200 Main St. Weirton, WV 26062	<b>COUNTIES SERVED</b> Hancock, Brooke
<b>PHONE</b> 304 748 5550	<b>NUMBER OF FUNDS</b> 7
<b>EMAIL</b> dwilson@bwkcpas.com	<b>TOTAL FUNDS</b> \$80,100

**H**ow does a young foundation inform its service area about what it is and does?

The Jackson County Community Foundation, an affiliate of the Parkersburg Area Community Foundation, decided to “show” rather than “tell”—and along the way forged strong linkages with local nonprofits and the business sector.

The organization created an event called the Charity Challenge. This September 20, 300 walkers and runners packed the streets of Ravenswood, each participating in support of one of 17 local nonprofit organizations.

The event raised funds for the nonprofits in two ways. First, participants sought sponsorship dollars for their chosen nonprofits. And second, the Foundation raised funds from local donors, primarily the business community. Those local donor monies were used to match the sponsorship dollars raised by participants, and also to grow the Foundation’s Jackson County Community Support Fund, which makes grants to nonprofits throughout the county. The event raised a total of \$50,000 for the 17 nonprofits, and \$10,000 for the Support Fund.

## **JUMPSTARTING A COMMUNITY**

# **FOUNDATION**

The Charity Challenge was widely covered by media. “I think everyone in Jackson County was touched by this event in one way or another,” says Foundation Board Chairman S. Douglas Ritchie. “It was a great demonstration of the Foundation’s effectiveness in helping local nonprofits meet local needs.”

Doug Ritchie, president of two plastics companies, is one of the Foundation’s strongest supporters. Foundation Services Representative Jane Winter says, “Doug has been tireless on our behalf. He’s introduced us to the business community, and he’s contributed to the Foundation both through his company and personally.” In fact, Doug Ritchie, his wife, Marcia, and their three children all took part in the Charity Challenge. Marcia Ritchie is a member of the Board of Directors of the Jackson County Public Library, one of the event’s 17 participating nonprofits.

Why does a successful businessman invest significant time and resources in a community foundation? Doug Ritchie replies, “Working with the Foundation allows businesses to make broader, more effective contributions to our community—across multiple organizations and, because the funds are permanent, for many years to come.

“Now, since the Charity Challenge, almost everybody knows about the Foundation—so I see good things ahead for our community.”



*Zak, Ross, Marcia, Doug, and Molly Ritchie, philanthropists. The family raised funds for local nonprofits, and businessman Doug Ritchie is Board Chairman of the local community foundation.*

**JACKSON COUNTY COMMUNITY FOUNDATION**  
*Affiliate of Parkersburg Area Community Foundation*



CONTACT	Jane Winters Foundation Services Representative	YEAR FOUNDED	2002
		COUNTY SERVED	Jackson
MAIL	P.O. Box 565 Ripley, WV 25271	NUMBER OF FUNDS	13
		TOTAL FUNDS	\$142,665
PHONE	304 532 5134		
EMAIL	jane.winters@pacfwv.com		
WEB	www.pacfwv.com/ Jackson_County_Community_Foundation.htm		

### Different Places on the Continuum

Community foundations work along a continuum that runs from building endowment to strengthening their community leadership role.

Says Janet Topolsky of the Aspen Institute, “Wise stewardship of funds results in resources that can help produce results. But a community foundation would be a resource even without its funds because its expertise is in looking at the community as a whole, and bringing different players together around a wide range of challenges and opportunities. Effective community foundations make connections between sectors, and produce synergies that might not otherwise happen.

“That’s why the most powerful community foundations are those in the middle of the continuum: building resources, and using them to develop their communities in ways that are meaningful for the people who live in them.”

That is happening at community foundations across West Virginia, particularly—although not only—with the older organizations, which build resources, develop their communities, and demonstrate effective leadership.

The State’s oldest community foundation—the Greater Kanawha Valley Foundation (TGKVF), established in 1962—holds grantwriting classes for other nonprofits in the area, and helps the nonprofits with strategic planning. TGKVF played a major role in a recent Harvard University national study of social capital. The second oldest—the Parkersburg Area Community Foundation (PACF), founded in 1963—is similarly high-profile, providing key leadership for the Consortium, and technical and fundraising support to local charities as well as other community foundations around the state. When an anonymous out-of-town benefactor wanted to honor a local hero—Army PFC Jessica Lynch, whose hometown is near Parkersburg—in a way that would benefit the entire community, the benefactor began building the Jessica Lynch Fund at PACF.

So West Virginia’s community foundations are building momentum—and Suzanne Feurt of the Council on Foundations believes that trend will continue, in the state and across the country. She says, “We’ll all have to be smart about the ways we work, and in shaping the future—but I think the future is bright.”

*One piece of the future is beginning to take shape in Webster County, where a group of dedicated people is working toward forming West Virginia’s next community foundation.*

*A leader of the group—Geary Weir, Executive Director of the Webster County Economic Development Authority—says “Webster County needs to attract businesses and workers, and we’ll do that more effectively if we can improve areas like health care, education, arts and culture, and social services. A community foundation cuts across all those areas and can help improve the general quality of life.”*

*A VISTA volunteer has been engaged to help drive the process, and is convening meetings and energizing the community around the idea of a community foundation. Soon the Philanthropy Index will help the community assess the resources potentially available for a foundation. Geary Weir says, “We want to do this right, so we’re taking it one step at a time. But our belief at this point is that, by next summer, Webster County will have its own community foundation.”*

### WEB RESOURCES

[www.GiveToWestVirginia.org](http://www.GiveToWestVirginia.org)

West Virginia Community Foundations Consortium

[www.cof.org](http://www.cof.org)

Council on Foundations; click on Community Foundations

[www.aspencsg.org/rdp](http://www.aspencsg.org/rdp)

Aspen Institute’s Rural Development Philanthropy Learning Network

[www.wvdo.org/community/nip.html](http://www.wvdo.org/community/nip.html)

West Virginia’s Neighborhood Investment Program (tax credits for charitable contributions)

[www.philanthropy.com](http://www.philanthropy.com)

Web version of *The Chronicle of Philanthropy*