



# 2021 ANNUAL REPORT



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## MISSION

To enhance the quality of life for all citizens of Owen County, now and for generations to come.

## VISION

To be the trustworthy resource for philanthropy by building permanent endowment, addressing needs through grantmaking, and providing leadership resources to serve our community.

## VALUES

**PHILANTHROPY:** We will promote community involvement and charitable spirit.

**STEWARDSHIP:** We will support and preserve donor intent across generations.

**LEADERSHIP:** We will act as a catalyst and collaborate with others to build a better tomorrow.

**INTEGRITY:** We will act ethically in every relationship.

**EXCELLENCE:** We will meet or exceed expectations in all we do.

**RESPECT:** We will honor the dignity and worth of all.

### WHO

Your Owen County Community Foundation (OCCF) has been serving our Owen County communities since our establishment in 1994. Our Foundation is committed to providing local philanthropists with the tools that they need to help Owen County become a better place to live, grow, and work.

### WHAT

We GATHER gifts from people who care about Owen County. People can make gifts in any amount - from a dollar to much larger. We keep these gifts in permanent funds that will give back to Owen County forever.

We GROW our pool of permanent assets, provided to us from our generous donors, through investing funds for the purpose of multiplying an investment beyond its original value.

We GIVE back to our communities through grants & scholarships that are funded by our investment returns. We maintain over 150 unique funds established by donors that each carry out a specific charitable goal.

### WHERE

Our impact and reach stretches across every curve, creek and hill of our Sweet Owen County but our home base is at our office located on the southside of the courthouse square in Spencer at 60 East Market Street.

### WHY

All for the greater good of Owen County!

*Forever Good*

# MESSAGE FROM OUR PRESIDENT



ceo@owencountycf.org



812.829.1725



janet.rummel



@janetrummel



janetrummel

Dear Friends,

I am pleased to share this report of another successful year in the life of the Owen County Community Foundation. Despite some continuing uncertainties regarding the COVID-19 pandemic, the work of OCCF continued to flourish. This was possible because of you, our fundholders, donors, and supporters, who are loyal, caring partners in community-wide philanthropy. Your continuing confidence inspires us every day.

It was gratifying to see the assets of the Foundation reach and exceed \$11 million after many years of stewardship and prudent investment by the Board. Strong financial markets coupled with the generosity of hundreds of donors have brought total assets to \$11.9 million as of December 31, 2021.

A year of gratitude!

It is a great privilege to be part of the Owen County Community Foundation. We are grateful for the leadership David Friedel provided over the past three years as Board Chair, and we welcome Myrna Fields as she steps into that role in 2022. David and Myrna's time and commitment to our community continues to make a tremendous impact, and we are forever grateful. OCCF's board is comprised of 15 community members who volunteer their time and talent and who care deeply for those living and working in our community. We are grateful for the service of retiring board member and past chair, Nancy Lorenz, and we thank her for her leadership.

Our county faces an incredible opportunity, one that requires us to think beyond simply returning to the way things were before the pandemic. But it will take all of us working together to realize our shared vision for an Owen County where everyone can thrive.

That's why the Owen County Community Foundation exists. For nearly three decades, the Community Foundation has worked to bring people and resources together, channel ideas into action, and invest in solutions. And the work to protect and support our community is more important now than ever.

This report features the impact that OCCF, our donors, and partners have had on this county in 2021 and beyond. These stories highlight the importance of your support and how it enables us to be responsive to all kinds of situations.

Thank you to those who have supported and partnered with OCCF on our mission to enhance the quality of life for all citizens of Owen County, now and for generations to come. Our work continues, and we are glad you have joined us.

Sincerely,

A handwritten signature in black ink that reads "Janet Rummel". The signature is fluid and cursive, with a large loop at the end.

**Janet Rummel**

President & CEO

# STRATEGIC PLAN

## Charting a New Strategic Direction: The Challenge and the Opportunity

The Owen County Community Foundation has worked for decades alongside organizations, leaders, and donors alike to step up to local challenges and improve the quality of life throughout Owen County. We have a long legacy of local impact through grants and local scholarships. During 2021, we embarked on a robust strategic planning process to determine how we can most effectively use our resources - human as well as financial - to serve our community in the coming years.

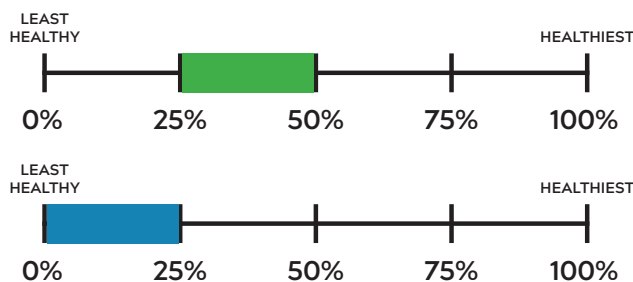
To keep pace with changes in our community and to meet the most pressing current needs, we knew that we needed to adapt and grow as an organization. We needed a strategic direction that would recommit us to serving Owen County, while recognizing that, in order to have the greatest impact, we could not be all things to all people, or in all places at all times. To be effective, we needed to establish clear priorities and to ground them in data about community need and a clear understanding of the Foundation's values.

## What We Explored

Over the course of the planning process, we conducted focus groups and interviews with nonprofits, donors, volunteers, local leaders, and other community members to understand how people perceive the Foundation's work and to get feedback on the biggest challenges the community and the nonprofits that serve it are facing. Finally, we looked inward, engaging board and staff in multiple conversations about who we are, what we stand for, and how we can make the greatest difference.

## What We Learned

The community's responses aligned with what we saw in the data, some of which is shown below. Asked to prioritize, our focus group and interview participants identified **health & wellness, education, and economic opportunity as top needs. Talent attraction, talent retention, and population growth, emerged as another priority, with a focus on increasing the percentage of high school and postsecondary students choosing to stay and work in Owen County.**



### Health Outcomes

Owen County is ranked in the lower middle range of counties in Indiana (Lower 25% - 50%)

### Health Factors

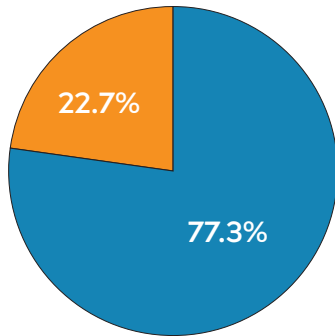
Owen County is ranked among the least healthy counties in Indiana (Lowest 0% - 25%)

*Health Outcomes* measures include length of life and quality of life; *Health Factors* measures include health behaviors, clinical care, social & economic factors, and physical environment.



## Education and Childcare

### Owen County Child Care Capacity for Children Under Age 5



- **CHILD CARE DESERT**  
Areas with more than 3 children per child care spot
- **MODERATE CHILD CARE CAPACITY**  
Areas with 1 to 1.4 child care spots per children

## Educational Attainment

Adults with High School Diploma or Higher		Adults with B.A. or Higher Degree	
Owen County	85.4% <i>County Rank 78/92</i>	Owen County	13.1% <i>County Rank 79/92</i>
Indiana	88.8%	Indiana	26.5%

## Population

Median Age	
Owen County	45.0
Indiana	38.0
Per Capita Income - 2020	
Owen County	\$45,143
Indiana	\$51,926
Median Household Income - 2019	
Owen County	\$53,387
Indiana	\$57,617

Owen County Living Wage - 2020		
1 Adult, 0 Children	\$27,616	\$13.28/hr
1 Adult, 1 Child	\$53,732	\$25.83/hr
2 Adults, 0 Children (Both working)	\$44,509 (Household income)	\$10.70/hr (Hourly wage for each adult)
2 Adults, 2 Children (Both adults working)	\$72,937 (Household income)	\$17.53/hr (Hourly wage for each adult)

Data Sources: 2022 Indiana Indicators: [indianaindicators.org](https://indianaindicators.org/); Indiana Department of Education; Indiana Commission for Higher Education; Early Learning Indiana; and STATS Indiana: [stats.indiana.edu](https://stats.indiana.edu)

# STRATEGIC PLAN GOALS

## The Heart of Our Strategy

The strategic intent of the Owen County Community Foundation is to improve our county's quality of life by supporting local donors and increasing the capacity of our nonprofit sector. To accomplish this, we plan to improve on what we do today and incorporated new elements into our work that will foster community, a culture of giving, and lasting change. Over the next five years, we will focus our efforts on the following overarching goals:

### GOAL ONE



**MARKETING & COMMUNICATION**  
*Share Our Purpose*

Nonprofits, donors, partners, and community are more aware of OCCF's vision, mission, and impact.

### GOAL TWO



**DEVELOPMENT & DONOR SERVICES**  
*Increase Assets to Increase Impact*

Promote philanthropy by helping donors meet their charitable goals and meet the community's greatest needs.

### GOAL THREE



**GRANTMAKING**  
*Make Effective & Inspiring Distributions*

Establish a more intentional grant process, linking funding priorities to focused outcomes.

### GOAL FOUR



**COMMUNITY LEADERSHIP**  
*Serve as a Strategic Community Leader*

Activate and convene resources.

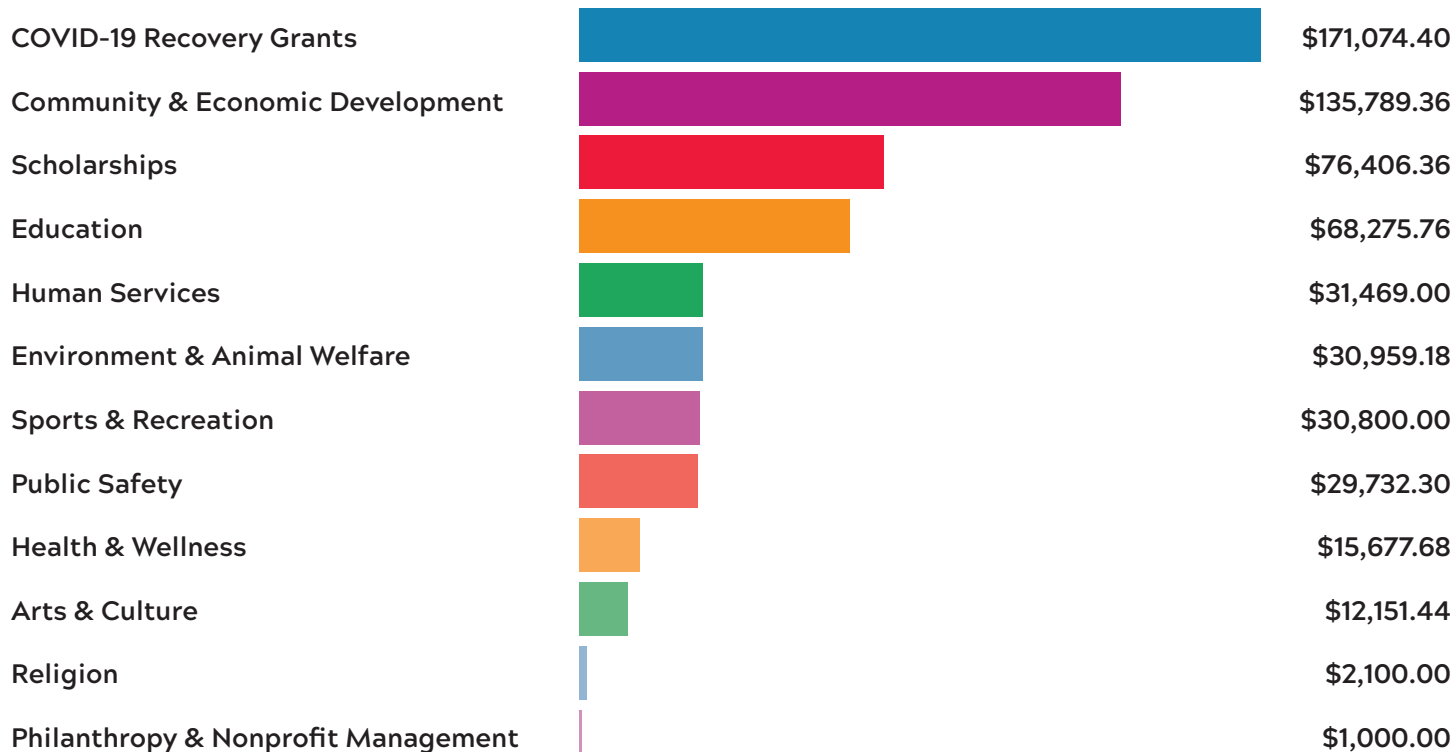
### GOAL FIVE



**SUSTAINABILITY**  
*Ensure the Permanence of the Foundation*

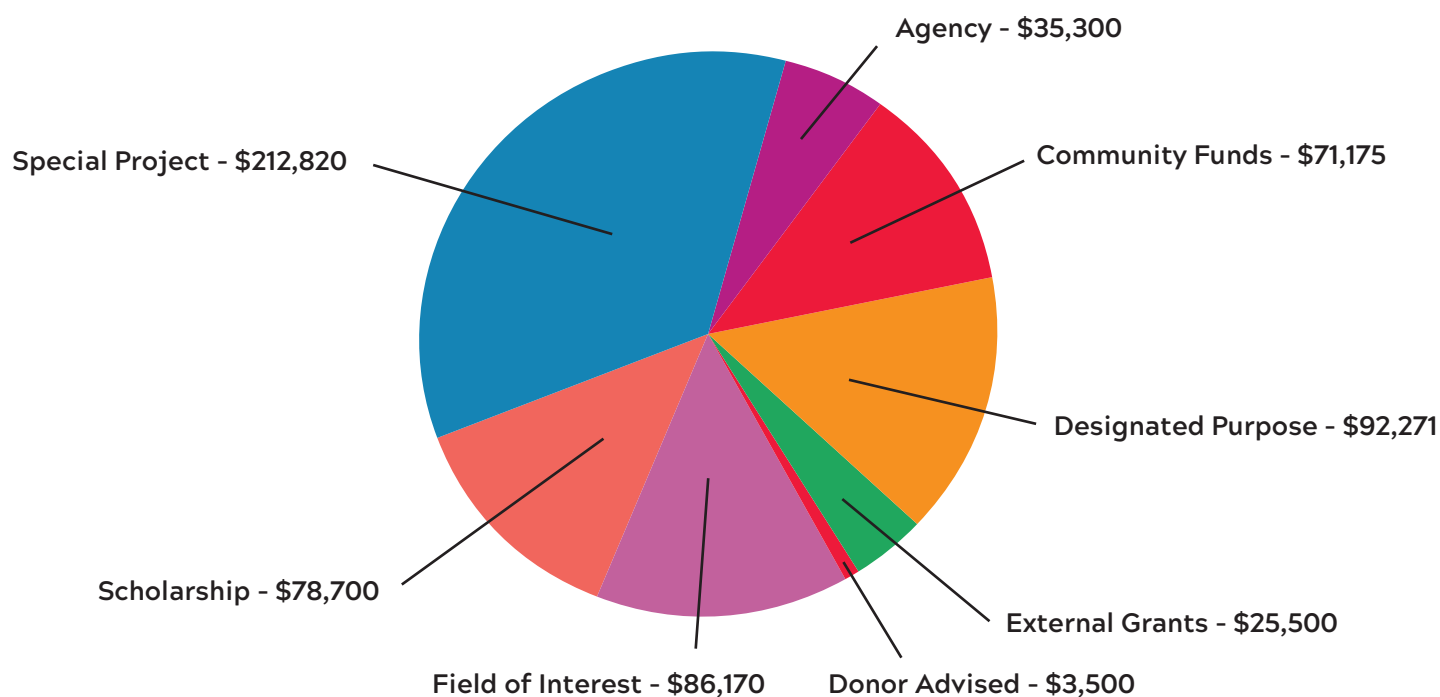
Build an energized and financially sustainable business model that aligns with our mission and meets our short and long-term goals.

# 2021 COMMUNITY IMPACT



**TOTAL: \$605,435.48**

## Grants Awarded by Fund Type





# 2021 GRANT AWARDS



OCCF provided \$25,000 in financial support for the new outdoor pavilion at the Owen County Public Library.



The Jack Simmerman Community Fund and D M J Community Fund provided a \$2,500 grant to the Owen Valley Choir Boosters for the purchase of a portable sound system and to provide financial assistance for costume purchases.



## Arts & Culture

Gosport History Museum:  
Designated grant from the  
Gosport History Museum Fund  
Owen County Art Guild: Interior  
building repair and restoration  
Owen County Heritage & Culture  
Center: Historic restoration of  
steps  
Owen County Heritage & Culture  
Center: Support of operations  
Owen County Heritage & Culture  
Center: Beautification and  
building repairs  
Owen County Preservations, Inc.:  
Designated grant from the  
Owen County Preservations  
Fund  
Owen County Preservations, Inc.:  
Butter machine replacement  
for the Historic Tivoli Theatre  
Owen Valley Band & Guard  
Boosters: Equipment purchase  
Owen Valley Choir Boosters:  
Scholarships and purchase of  
equipment  
Historic Tivoli Theatre:  
Designated grant from the  
Tivoli Theatre Endowment Fund  
Vandalia Community  
Preservation Association:  
Designated grant from the  
Flona Everly Query Fund

## Community & Economic Development

Beech Cemetery Association:  
Beech Cemetery Association:  
Designated grant from the  
Irene & Arthur Kelley Beech  
Cemetery Fund  
Carolina Church & Cemetery  
Association: Designated grant  
from the Carolina Cemetery  
Fund  
Fiscus Cemetery: Designated  
grant from the William  
Donald & Maxine Wells Fiscus  
Cemetery Fund  
Gosport Business Association:  
Christmas decorations for  
Main Street

Gosport Business Association:  
Clock restoration  
New Union Carolina Church &  
Cemetery: Church remodel  
Owen County Chamber of  
Commerce: Designated  
grant from the Economic  
Development Fund  
Owen County Chamber of  
Commerce: Back to School  
Expo



Thanks to a generous donor, we were able to provide hundreds of students with backpacks and school supplies at the Back to School Expo

Owen County Chamber of  
Commerce: Community  
fireworks display  
Owen County Chamber of  
Commerce: Overstreet  
Center for Entrepreneurship  
partnership  
Owen County Chamber  
of Commerce: Chamber  
membership for Lewis Worman  
HOA  
Owen County Public Library:  
Outdoor pavilion  
Patrickburg Lutheran Cemetery:  
Designated grant from Irene  
& Arthur Kelley Patrickburg  
Lutheran Cemetery Fund  
Riverside Cemetery Association:  
Designated grant from  
Riverside Cemetery Fund  
Riverside Cemetery Association:  
Development of new cemetery  
section  
Spencer VFW Auxiliary Post  
1405: 9/11 and PFC Brett Wood  
remembrance event  
Town of Gosport: Cleanup and  
maintenance of Gosport Town  
Park

Town of Spencer: MYPATH South  
Main Street Project  
Town of Spencer: Security for  
Public Restroom Project

## COVID-19 Recovery Grants for Nonprofits

Cunot Community Center Inc.  
Cunot Food Pantry  
Delta Theta Tau Sorority IOTA  
CHI Chapter  
First Church of the Nazarene  
Friends of McCormick's Creek  
State Park  
Girl Scout Troop 04698  
Gosport Community Building  
Gosport Lazy Days Festival  
Kappa Kappa Sigma  
Owen County 4-H Council  
Owen County Chamber of  
Commerce & Economic  
Development  
Owen County Farmers' Market  
Owen County Public Library  
Rev 20, Inc.  
Senior Friends of Owen County  
Spencer Lions Club  
Spencer Pride, Inc.  
Tivoli Theatre  
Upland PEAK Sanctuary  
VFW Auxiliary Post 1405

## Indiana OCRA COVID-19 Recovery Grants for Small Businesses

*Administered by OCCF*

Abram Farm, LLC  
Bill Ranard Auto Repair  
Chambers Restaurant  
Civilian Brewing Corps  
Cliff's Edge Paintball  
Ed's Body Shop  
Elliott Construction  
Frye Towing  
Genuine Auto Service  
Gosport Dental Clinic  
Insurance Pros - Brinson Agency  
Interior Restorations  
Mader Mill  
Main Street Coffee

# 2021 GRANT AWARDS

McCormick's Creek Stables  
Nate's Candy Jar  
Simple Divine Suds  
Reeves Farm Market  
Rolling Meadows Golf Course  
Show Barn Quality Equipment  
World Arts, Inc.

## Education

Patriot Manufacturing Summer Work: Payton Barger, Caleb Bixler, Jasmine Brewer, Ryan Cowden, Eric Crouch, Matthew Crum, Kaleb Dill, Kyndall Drake, Iain Duncan, Graciawna England, Camie Forston, Haley Frank, Tina Hayden, Andrew Heaton, Lola James, Elizabeth Johnson, Madison Kay, Cooper King, Presley McPhee, Aubrie Miller, Kristen Portteus, Kristen Richardson, Hannah Riggs, Rhonda Schafer, Robert Wheeler  
Elizabeth Conway: Teacher Mini-Grant - Equipment purchase  
Shonda Klinger: Teacher Mini-Grant - Equipment purchase  
Neil Klodzen: Teacher Mini-Grant - Into the Wild books  
Robin Lane: Teacher Mini-Grant - iPad for preschoolers  
Amy Lanham: Teacher Mini-Grant - Book club  
Korri Martin: Teacher Mini-Grant - Digital art tablets  
Beth Nairn: Teacher Mini-Grant - Breakfast with Opie  
On My Way Pre-K Support Program: Support from donor-advised grant  
Owen County 4-H Council: Designated grant from the Lloyd H & Rosalie Lucas 4-H & FFA Fund  
Owen County Adult Education: Job skills training with maker projects  
Owen County Fair Association: Designated grant from Owen County 4-H Livestock Fund

Owen County Head Start: Scholarship for Chamber of Commerce membership  
Owen County Public Library: Designated grant from Jack R. DeFord Library Fund  
Owen County Public Library: Adult Education Program  
Owen Valley FFA: Designated grant from the Lloyd H & Rosalie Lucas 4-H & FFA Fund  
Owen Valley High School: Teacher Mini-Grant - Patriot Expo Teacher Appreciation  
Owen Valley Jr. Air Force ROTC: Designated grant from the Owen Valley Jr ROTC Fund  
Owen Valley Jr. Air Force ROTC: Year end programs & awards  
Owen Valley Middle School: Curriculum building  
Owen Valley Middle School: Maker space summer training  
Owen Valley Middle School: Equipment purchase  
Owen Valley Middle School: Maker Space Program: Equipment purchase  
Owen Valley Middle School: Maker Space Program: Maker space start-up  
Peggy Schrougham: Teacher Mini-Grant - Small group materials  
Spencer - Owen Community Schools: 2020-21 Preschool scholarship program  
Spencer Elementary School: Teacher Mini-Grant - Heggerty decodable book sets  
Spencer Elementary School: Teacher Mini-Grant - Rocket launch  
Judy Tucker: Teacher Mini-Grant - Science in action  
Emily Vladoiu: Teacher Mini Grant - Sensory equipment



George Allison and his family provided a grant from the Allison Family Fund to the Owen County Humane Society to assist with their operating expenses.

## Environment & Animal Welfare

Owen County Humane Society: Designated grant from Owen County Humane Society Fund  
Owen County Humane Society: Support from donor-advised grants  
Owen County Humane Society: Dog kennels  
Owen County Soil & Water Conservation District: Operational support  
Owen County Soil & Water Conservation District: New Meadow Project and Dixie Chopper  
Owen County Soil & Water Conservation District: MYPATH Trail System development

## Health & Wellness

Owen County Family YMCA: Designated grant from Jim Vance Owen County YMCA Fund  
Summerfield Health Care Center: Designated grant from O'Connor Family Fund

## Human Services

Area 10 Agency on Aging: Multi-year grant for Rural Transit bus  
Area 10 Agency on Aging: Designated grant from Freeman Charitable Food Fund





Garrard Chapel Food Pantry. OCCF provides financial support to food pantries all across Owen County through the Freeman Charitable Food Fund.

Area 10 Agency on Aging:  
 Designated grant from Area 10  
 Agency on Aging Fund  
 Area 10 Agency on Aging/Rural  
 Transit: Rural Transit expansion  
 Big Brothers Big Sisters of South  
 Central Indiana: Owen County  
 programming  
 Garrard Chapel Food Pantry:  
 Drive-through food  
 distribution building  
 Hoosiers Feeding the Hungry:  
 Meat processing  
 Life Designs Inc.: Accessible  
 women's restroom remodel  
 New Beginnings, Crisis  
 Pregnancy Center: Curriculum  
 update  
 Senior Friends of Owen County:  
 Designated grant from Senior  
 Friends of Owen County Fund  
 Servants at Work (SAWs):  
 Wheelchair ramps and steps for  
 financially challenged residents  
 Spencer Pride, Inc.: Western  
 façade repair  
 Spencer Pride, Inc.: Building  
 repairs  
 Susie's Place Advocacy Center:  
 Designated grant from Child  
 Abuse Prevention Fund

## Philanthropy & Non-Profit Management

Kappa Kappa Kappa, Inc. - Alpha  
 Delta Chapter: Fundraising  
 item purchase  
 Rev 20, Inc.: Scholarship for  
 Chamber of Commerce  
 membership  
 Spencer Exchange Club: 2021  
 Bikes for Tykes program  
 Spencer Lions Club: Equipment  
 purchase  
 Spencer Main Street: Christmas  
 at the Square capital goods  
 purchase

## Public Safety

Cataract Volunteer Fire  
 Department: Upgrade to MFPA  
 standard helmets  
 Cataract Volunteer Fire  
 Department: Fire incident  
 reports & record keeping  
 update  
 Coal City Volunteer Fire  
 Department: Generator  
 purchase  
 Fraternal Order of Police  
 Lodge 183: Bullet-proof vest  
 equipment purchase  
 Fraternal Order of Police Lodge  
 183: Shop with a Cop  
 Owen County Sheriff: Christmas  
 for the Kids

Owen County Sheriff: Officer  
 training  
 Owen County Sheriff: Interview  
 room recording system

## Religion

Owen County Christian  
 Programs, Inc.: Designated  
 grant from Owen County  
 Ministerial Fund  
 Spencer United Methodist  
 Church: Designated grant from  
 Bennie J & Joan R Woodruff  
 Methodist Church Fund  
 St. Jude Catholic Church:  
 Designated grant from St. Jude  
 Catholic Church Fund

## Sports & Recreation

Cub Scout Pack 285: Recharter  
 registration fees  
 Friends of MYPath: Friends of  
 MYPath start-up costs  
 Friends of MYPath: Trail cameras  
 and professional trail usage  
 counter  
 Owen Valley High School  
 Baseball: Support from donor-  
 advised grant  
 Owen Valley Sports Complex:  
 New playground



# SCHOLARSHIP SPOTLIGHT



2021 PFC Brett Wood Memorial Scholarship recipient Hannah Amos

## PFC Brett Wood Memorial Scholarship

In 2011, the PFC Brett Wood Memorial Scholarship was established as part of a community effort to celebrate the life of Brett Wood, whose life was lost in September of 2011 while serving his country. After graduating from Owen Valley High School in 2010, PFC Wood joined the Army, was stationed in Fort Wainwright, Alaska, and then deployed in April 2011 for a one-year tour in Afghanistan. Wood's life was taken in Afghanistan on September 9, 2011, by an improvised explosive device (IED). When Wood was escorted home by his brother (Nikk Wood), the people of Owen and surrounding counties lined the entire length of Morgan Street with hats off and flags waving in hand. Wood's life was mourned greatly throughout the Owen County community, and this fund was established in his name through generous donations.

In 2021, the OCCF focused on helping this fund reach the required \$25,000 endowment for a scholarship fund. As part of our fundraising efforts, your OCCF partnered with the Spencer VFW Auxiliary Post 1405 to put on a community-wide 9/11 and PFC Brett Wood remembrance event on September 11, 2021. Our efforts and your generosity raised nearly \$12,000 in 2021, and while the fund needs another \$3,000, we are confident that you will help get this scholarship endowed in 2022.





## Dick (Mr. Dyar) & Sue Dyar Scholarship Fund

In late 2020, the Dick (Mr. Dyar) & Sue Dyar Scholarship Fund was established by John & Sylvia Dyar to honor Dick & Sue Dyar, a couple well-known in the Spencer and Bloomington communities for their many years of dedicated service to the fields of education and medicine. In 2021, this scholarship was presented for the first time to Julianna Hartman, a graduating Owen Valley High School senior who demonstrated proficiency in the sciences and who desired to continue studies in life sciences. Since this scholarship's establishment, the celebrated Mr. Dyar passed away at the impressive age of 94. We are honored to have had the opportunity to work with Mr. Dyar and his family on establishing this scholarship to help his legacy live on in our Owen County communities, now and for forever.

### *Want to support these funds?*

If you would like to honor PFC Brett Wood or Dick & Sue Dyar and help support a college-bound student, please utilize our secure, online donation portal on our website [www.owencountycf.org](http://www.owencountycf.org) or via mail at OCCF, P.O. Box 503, Spencer, IN 47460.

# 2021 SCHOLARSHIP AWARDS

## **Babbs Supermarket Scholarship Fund**

Julianna Hartman

## **Bennie J. & Joan R. Woodruff Scholarship Fund**

Ronald Martin  
Thadeus Sylvester

## **Braysville Homemakers Scholarship Fund**

Kalynn Nanny

## **Burns Family Scholarship Fund**

Emily Stierwald

## **Charles T. Cooper Scholarship Fund**

Alana Michalow

## **Charles W. Edwards Scholarship Fund**

Maleah Kristof

## **Clinton & Louise Abrell Scholarship Fund**

Presley McPhee

## **Coyne Family Scholarship Fund**

Tina Hall

## **David Campbell Gray Scholarship Fund**

Emily Fryberger

## **Dick (Mr. Dyar) & Sue Dyar Scholarship Fund**

Julianna Hartman

## **Dyer Family Scholarship Fund**

Kaleb Dill

## **Elliott Hickam Scholarship Fund**

Grace Pendleton

## **EPIC Scholarship Fund**

Kenzington Brown

## **Erika Wells Memorial Scholarship**

Grace Pendleton

## **Freedom Alumni Scholarship Fund**

Marjorie Abrell

## **Gary McCarter Scholarship Fund**

Marjorie Abrell

## **George & Nancy Thurston Artistic Fund**

Thadeus Sylvester

## **Gosport Alumni Scholarship Fund**

Emily Fryberger

## **Gosport Lions Club Scholarship Fund**

Meilynn Dow

## **Ione W. Fulk Scholarship Fund**

Abigail Herrington

## **James P. Root Scholarship Fund**

Blake Von Bokern

## **Jim & Wilma Fulford Scholarship Fund**

Rebecca Terry

## **John Moore Scholarship Fund**

Alana Michalow

## **Josephine Brown Owens Scholarship Fund**

Thadeus Sylvester

## **Judy Hamilton Education Scholarship Fund**

Mackenzie Carver

## **Lloyd H. & Rosalie E Lucas Agri-Science Scholarship Fund**

Kalynn Nanny  
Kristen Richardson

## **Loretta Heidrick Memorial Scholarship Fund**

Tina Hall

## **Lyle & Marion Brighton Scholarship Fund**

Kayla Potts

## **MacMorran Family Scholarship**

Abigail Herrington  
Maleah Kristof

## **Margaret Marley Pinkston Scholarship Fund**

Whitley O'Neal

## **Mearl & LaVerne Brown Scholarship Fund**

Hannah Amos  
Hannah York

## **Melvin R. & Margaret A. Hall Nursing Scholarship Fund**

Kara Schafer

## **Michael Job Vocational Scholarship Fund**

Kalynn Nanny

## **Mildred E. Harbison Scholarship Fund**

Abigail Warthan

## **Myrtle S. Marshall Business Scholarship Fund**

Charley Truax

## **Our Community Bank Scholarship Fund**

Cody Morris

## **Owen County Farm Bureau Scholarship Fund**

Luke Strouse

**Owen County I.U. Varsity  
Club Scholarship Fund**

Presley McPhee

**Owen County Works  
Scholarship Fund**

Kalynn Nanny

**Owen Valley FFA Scholarship  
Fund**

Luke Strouse

**Patrickburg Alumni  
Scholarship Fund**

Julianna Hartman

**PFC Brett Wood Memorial  
Scholarship**

Hannah Amos

**Quincy Alumni Scholarship  
Fund**

Cody Morris

**Rebecca and William  
Applegate Scholarship Fund**

Isabel Kay

**Robert & Barbara Stanley  
Bonness Scholarship Fund**

Robert Martin

Kyle Swafford

**Roma Wilson Scholarship Fund**

Lynn Marie Osborne

**Ronald E. & Carol L. Patterson  
Dillingham Scholarship Fund**

Alana Michalow

Rachel Wilkins

Thadeus Sylvester

**Sons of American Legion  
Joe Carmichael Memorial  
Scholarship**

Hannah Amos

Isabel Kay

**Spencer Alumni Scholarship  
Fund**

Colby Beckwith

Nolyn Wyatt

**Tri Kappa Scholarship Fund**

Tina Hall

Julianna Hartman

Kalynn Nanny

Rebecca Terry

**West & Parrish & Pedigo  
Scholarship Fund**

Presley McPhee

**Woody & Barry Franklin  
Scholarship Fund**

Gavin Livingston



## Kristine Arnold is the 2021 Owen County Lilly Endowment Community Scholar.

Kristine is the daughter of Clark and Melissa Arnold, of Freedom, and she graduated in May 2021. Some of her many extracurricular activities included: student body president of Owen Valley High School's class of 2021, president of Willing Workers 4-H Club, and vice-president of Junior Leaders. She was also active in sports achieving All-Conference and All-Academic Conference in varsity golf. Kristine is currently attending IU-Bloomington where she is pursuing a degree in pre-med.

The Lilly Endowment Community Scholarship program was first offered by Lilly Endowment Inc., in 1998 to help raise the level of educational attainment in Indiana and to increase awareness of the beneficial roles Indiana community foundation can play in their communities. Lilly Endowment Community Scholars receive full tuition for four-years to an accredited public or private college or university within Indiana and an annual book stipend.



# MYPATH TRAIL SYSTEM

In 2016, it seemed simple enough. Let's connect the Family YMCA to McCormick's Creek State Park with a walking/biking trail. That way, people can connect to two important landmarks, on opposite ends of town, without having to walk or bicycle in the roadway.

Through the continuing development of what is now known as the MYPATH Trail System, the route has become slightly more complicated and largely more exciting. Like communities all around the state, Spencer has recognized the opportunities and convenience that an attractive trail system provides. Housing and economic development near the trail ensure that customers and residents will have easy access to the trail and all the connections it will provide.



*MYPATH Mural - Downtown Spencer*

Currently, part of the MYPATH Trail System consists of a network of shared sidewalks through the town. You may have noticed the MYPATH banners hanging along Main Street or the mural on the former Spencer Coffee House. A MYPATH trail pavilion stands in Cooper Commons near the Veterans Memorial Bridge at the White River.

Cross the bridge and see a MYPATH interpretive trail sign, near the Owen County Soil and Water District office. Take time to learn some history about the Town of Spencer and the former Town of Southport, which is now partly under water.

Continue past the sign along a natural trail that leads to river vistas, a prime birdwatching area, wetlands restoration, and a lowland reforestation project. Notice and enjoy the library's StoryWalk project, with pages of a storybook installed along the path. In the future, the trail surface will be upgraded to make the path ADA accessible. Also, a bridge will cross Elliston Creek and allow visitors to cross into the MYPATH Meadow, a prairie restoration project. Next, the trail will continue to the DNR river access site and eventually to McCormick's Creek State Park.

The larger vision is one of continued connectivity enabling residents and visitors to travel between neighborhoods and downtown Spencer. MYPATH will continue to provide safe and convenient connections throughout Spencer as it continues to reach neighborhoods and eventually Cooper Commons and the Owen County Fairgrounds.

What seemed like a simple connection at the beginning has turned into a much larger project. A planned network of trails will connect the newly designated neighborhood districts with wellness and programming at the Family YMCA on one end and McCormick's Creek State Park at the other, while opening opportunities in between. Meanwhile, the network connects residents and visitors to activities and shopping in Downtown Spencer and unique natural features along the White River.

Experience the existing trail system during the weekly trail walk that starts next to the Owen County Soil and Water Conservation District office at 788 Pottersville Road, every Wednesday at 10 am. During spring and summer, join one of the First Friday trail walks, from different locations. Check [MYPATHtrail.org](http://MYPATHtrail.org) for updates. The MYPATH Trail System Facebook page also has updates. Help complete the trail by joining the Friends of MYPATH organization.

The Owen County Community Foundation continues to provide leadership for the MYPATH Trail System with a MYPATH Advisory Board, composed of government and private sector leaders. Kyle Hannon serves as Project Manager for MYPATH, coordinating efforts and advancing the project's goals. Hannon has served in many community development positions in different communities in Indiana. He has been involved with multiple bicycle trail projects and was Chair of the Indiana Bicycle Trails Task Force.

His mother Joanne used to write about some of the wonders of Owen County for the *Spencer Evening World* in her popular newspaper column, "My Window to Owen County's Treasures."



## A New Era Begins

*Goodbye, Mark. Hello, Kyle!*



### Mark Rogers

#### Former MYPATH Director

After 20 years of serving our Owen County communities, Mark Rogers has officially retired as the Director of MYPATH and President & CEO of your OCCF. Since Mark's beginning with the Foundation back in 2002, his forward-thinking and dedication to helping Owen County has been instrumental in providing our organization with the tools necessary to take our community initiatives to the next level. Mark's legacy has and will continue to touch every corner and riverbed of Owen County as the MYPATH Trail System's progress forges ahead. We are incredibly grateful for the time and passion that Mark put into his work during his tenure, and your OCCF wishes him nothing but the best as he ventures into this new chapter of his life.



### Kyle Hannon

#### MYPATH Project Manager



[mypath@owencountycf.org](mailto:mypath@owencountycf.org)



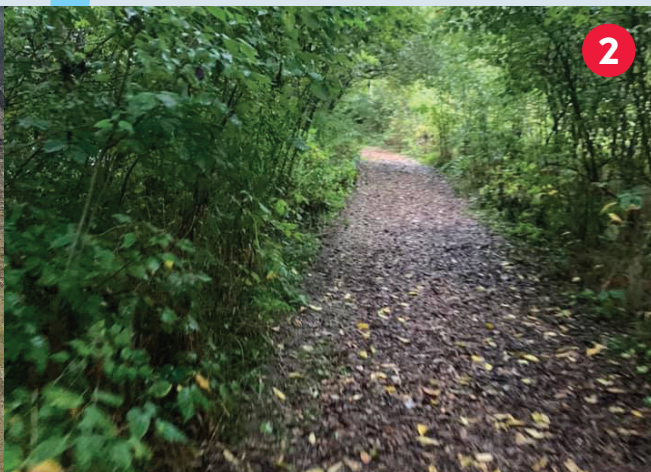
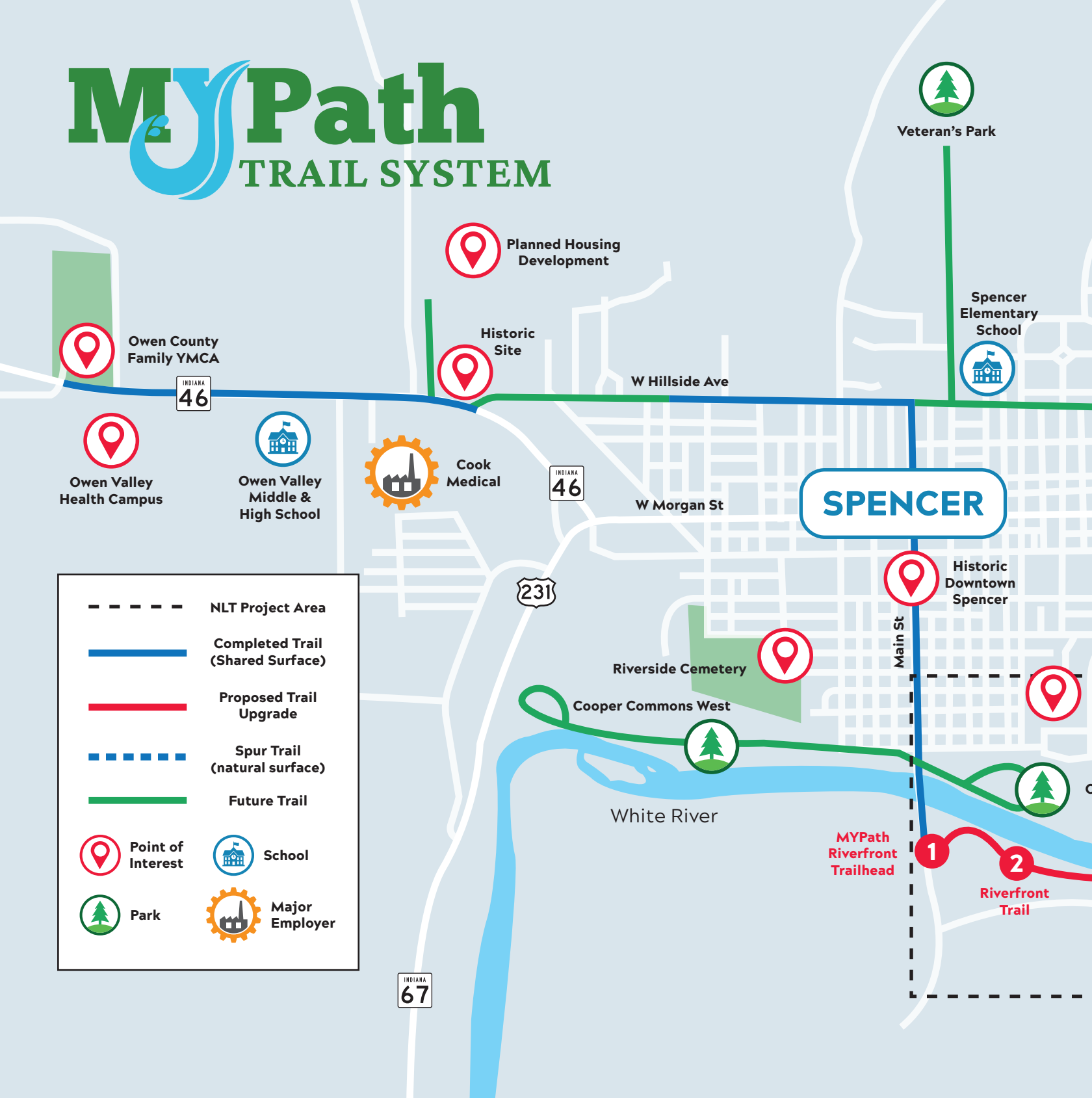
[www.mypathtrail.org](http://www.mypathtrail.org)

Kyle began working with the MYPATH Trail System in October 2021. He has been involved in community development and trail projects for many years, including serving as Chair of the Indiana Bicycle Trails Task Force from 2017-2019. Kyle grew up on the southside of Indianapolis and lived many years in Elkhart, Indiana, where he led the Greater Elkhart Chamber of Commerce and served as Executive Director of the Ivy Tech campus. While Kyle and his family lived up north, his parents lived in Owen County, and his mother Joanne wrote a popular column for the *Evening World*. Many trips were made to Owen County, bringing the grandkids down to visit. He and his wife, Shawn, moved to Southern Indiana in 2020. Kyle is an avid hiker, cyclist, camper and fisherman, a few of the reasons he enjoys Owen County.

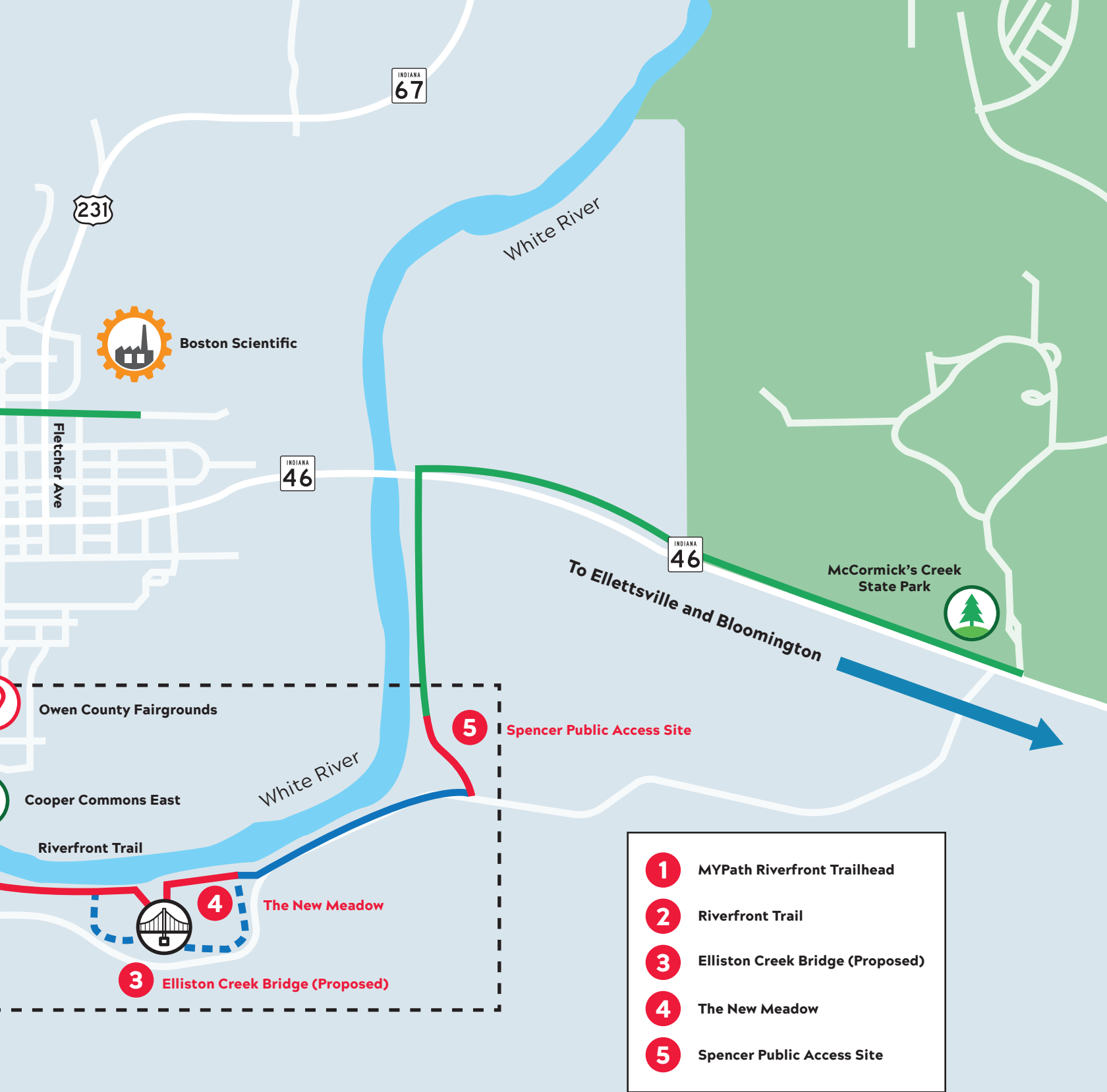


# MyPath

## TRAIL SYSTEM







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*Every effort is made to ensure your name is written as you wish. If your name is incorrect or you wish to be listed differently, please contact us by phone, email, or regular mail.*

2021

729  
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2021

199  
New Donors

2021

1,262  
Gifts

2021

652  
Gifts Under \$100

## Give Back to our Owen County Communities

### *Why choose a community foundation?*

A community foundation is a philanthropic organization that collects financial gifts and uses the earnings off of investments to give out grants and scholarships throughout our Owen County communities. Gifts to a community foundation can be made in the form of direct monetary donations, stock, property, gift annuities, or left in a legal will. Donations can be placed in an already established endowment or can be used to create a new fund.

A foundation is a great way for individuals, businesses, and organizations to charitably give to their community for years to come.

Unlike one-time gifts to charitable organizations, a foundation is able to invest funds for the purpose of multiplying an investment beyond its original value. With the help of a foundation, a donor is able to use a gift to continually give back into the community.

Since 1994, your OCCF has led a local effort to build up a permanent pool of assets to support our mission of enhancing the quality of life for all citizens of Owen County, now and for generations to come.

We gather, grow, and give!

## How to Give

- Cash
- Stocks, Bonds, and Mutual Funds
- Bequest by Will
- Real Estate
- Life Insurance
- Retirement Accounts
- Gift of Grain

### *Giving back to our Owen County communities is easy!*

You can visit our secure online donation portal at:

**[www.owencountycf.org](http://www.owencountycf.org)**

Click on the “Donate” button where you can select one of our over 150 funds to give to.

You can also mail your donation to:

**OCCF**

**P.O. Box 503, Spencer, IN 47460**



### SCAN TO GIVE!

Open your smartphone camera and aim it at the code like you're taking a picture. Then click on the popup!

# GIFT OF GRAIN

## Giving a Gift of Grain

### *Giving (Grain) Today...Growing Tomorrow*

Your OCCF is excited to announce a new Giving Option - Gifts of Grain.

## How it Works

When you donate a gift of grain it will benefit your community forever. Here is an example of a \$10,000 gift of grain:

Taxable Income without the Charitable Gift		Taxable Income with the Charitable Gift
\$35,000	Other income from farming	\$35,000
\$10,000	Income from grain sales	\$0
\$45,000	Total taxable income	\$35,000

*\*You pay employment, federal income and state income tax based on adjusted gross income (less typical exemptions, deductions, etc.)*

Note: Crops produced for sale in a farming operation are considered “ordinary income property.” The deduction for a gift of ordinary income property to a charitable organization is limited to the lesser of fair market value or cost basis. Typically, the cost basis has already been deducted from income as the costs of producing the crops; thereby commonly the cost basis is zero (0), making the gift, in effect, non-tax deductible.

As each individual farmer’s situation is different, you should consult your professional advisor for legal and tax advice on how a gift of grain to the OCCF may apply to your circumstances. Nothing in this article should be construed as providing you with legal or tax advice. If you would like to donate a gift of grain your local elevator will provide the appropriate donation form.





## Tips for Making Gifts of Grain to Benefit Your Community Through the Community Foundation:

- **Timing** - Gifts of grain to charity can be made from the current or previous year's harvest.
- **Unsold Commodity** - The gift must be from unsold crop inventory with no prior sale commitment. A farmer will gift the grain to the Owen County Community Foundation (OCCF), or designate a specific charitable fund within the Foundation.
- **Physical Delivery** - Be sure the gift is farm commodities, not warehouse receipts, which could be considered a cash equivalent. The OCCF must be able to demonstrate "control and dominion" over the gifted property.
- **Retention of Control** - Farmers cannot offer guidance in the transfer agreement as to retention or sale of the gifted commodity.
- **Documentation** - The transaction must be well-documented to show the OCCF as owner of the grain. A Gift of Grain Notification Form and a properly executed warehouse receipt in the OCCF's name must be completed. The original sales invoice for the gift of grain must list the OCCF as the seller.
- **Storage & Transportation Costs** - After the transfer of ownership of the grain. The OCCF assumes the risks of storage, marketing, and transportation costs, as well as price risk.
- **Crop Share Landlords** - Crop share landlords cannot gift grain. Shares of crop are rental income that must be reported as income on their tax return.
- **Tax Outcomes** - Costs associated with growing the crops may not be deductible if those costs are incurred in the same year as the year of the donation of the grain. Therefore, gifts made from the prior years' unsold crop inventory may offer the best tax results. Tax outcomes are also impacted by whether a farmer does cash or accrual accounting. See your tax advisor to determine if this is the best course of action for your circumstances.
- **Storing Grain on Farm** - Grain can be stored on a farm rather than being delivered to an elevator and still be gifted to the OCCF. A notarized letter of grain transfer should be prepared and delivered to the OCCF. This will take the place of a warehouse receipt.
- **Farm Corporations** - The benefits described in article apply to the calendar year-cash basis sole proprietorships. Corporations are not treated the same way from a tax perspective. Ask your tax professional to see if your farm operation can benefit from a charitable gift.
- **Government Payments Limitation Caps** - The gift of grain will not count as income in government payments limitation cap.

*Always consult your professional tax or legal advisor to determine the tax implications for your situation prior to making a gift. This article contains guidelines to assist in the mechanics of making a charitable gift of agricultural commodities and is not to be construed as specific tax advice.*

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Mark & Pennie Rogers  
Janet Rummel

**Melisa O'Connor**

Maria O'Connor

**Regan O'Connor**

Maria O'Connor

**Maria, Regan, and  
Mitch O'Connor**

Gail O'Connor

**The Board & Staff at the  
Owen County Community  
Foundation**

John & Sylvia Dyar

**Owen Valley High School  
Class of 1977**

David Livingston

**Aimee Parrish**

Steve & Alice Parrish

**Alice Parrish**

Penny Carpenter

**Shawn Parrish**

Steve & Alice Parrish

**Spencer Pride Volunteers**

Mark & Pennie Rogers

**Steve & Alice Parrish**

John & Sylvia Dyar  
Donnie & Lea Feltner

**Steve Parrish**

Alice Parrish

**Sydney Parrish**

Steve & Alice Parrish

**Steve & Becky Pedigo**

Dave & Barbara Brinson  
John & Sylvia Dyar

**Steve Pedigo**

Steve & Alice Parrish

**Jordan Quillen**

Kelsey Hanlon

**Steve Redenbaugh &  
Melva Cooper**

John & Sylvia Dyar

**Andy & Darlene Richards**

John & Sylvia Dyar

**Mark & Pennie Rogers and  
Family**

Karah Bobeck  
John & Sylvia Dyar

**Don & Lori Rudzinski**

Penny Carpenter  
John & Sylvia Dyar

**Lori Rudzinski**

Steve & Alice Parrish

**Janet Rummel**

Karah Bobeck

**Dr. & Mrs. Tom & Cindy Ryan**

Shirley Burke

**Walter Sadler**

Rob & Cassie Babbs

**Julia Sieradzan**

Steve & Alice Parrish

**Mindy Sieradzan**

Steve & Alice Parrish

**Rachel Sieradzan**

Steve & Alice Parrish

**Ray Sieradzan**

Steve & Alice Parrish

**Adam & Kassie Smithey**

Chase Coffield  
Diana Gardner-Cole

Michael McNulty  
Pamela Richards

**The Cheeseburger Guys at  
the Sons of the American  
Legion**

John & Sylvia Dyar

**Denise Sudol**

Karah Bobeck & Winston Fulton

**Bob Taylor**

John & Sylvia Dyar

**Don & Gloria Townsend**

John & Sylvia Dyar

**Darrell White**

Karah Bobeck

**Rob White and Family**

John & Sylvia Dyar

**Becky Wilson**

Steve & Alice Parrish

**David Wilson**

Steve & Alice Parrish

**Rex Wilson**

Steve & Alice Parrish

**Shirley Wilson**

Steve & Alice Parrish

**Tad & Shirley Wilson**

Don & Marilyn Jackson

**Tad Wilson**

Karah Bobeck  
John & Sylvia Dyar  
Steve & Alice Parrish

**Steve Withem & Baby**

Karah Bobeck

**Steve Withem and Family**

John & Sylvia Dyar

*The individuals listed here have been honored by a contribution to one of the permanent endowed funds within the Owen County Community Foundation. Such tributes recognize friends or family on occasions of a birth, anniversary, birthday, holiday, or any special celebration. It is another way to make a lasting impact in the community with a contribution to the Owen County Community Foundation.*

# MEMORIAL GIFTS

**Harley Allen**

Babbs Supermarket

**Jetta Allison**

Amber, Kenny-Ray,  
& Gabraelle Augustus  
George Allison  
Michael & Julie Donham  
John & Cindy Hackworthy

**Lynn Arnett**

Dave & Barbara Brinson  
Jordan Quillen

**Bob & Rosann Babbs**

Rob & Cassie Babbs

**Martha Bandy**

Jack & Linda Simmerman

**Woodrow Barton**

Marilyn K. DeFord

**John Beem**

David Livingston

**Janet Berry**

Tom & Jennifer Abrell  
Jane McCollum

**Bob & Gene Bowen**

Roger & Barbara Bowen

**Tim Brinson**

Dave & Barbara Brinson

**Irene Brock**

Marry Ellen C. Smith  
Jane McCollum

**Wilma & Geraldine Bucklew**

Owen County Community  
Foundation Board & Staff  
The Family of Orval & Ilagene  
Bucklew

**Raymond “Bos” & Randy Buis**

Martha Jean Buis

**Kathy Carey**

Braysville Homemakers  
Association

**Adam Casebeer**

Kelsey Hanlon

**Keith Casebeer**

Kelsey Hanlon  
Alan & Donna McElroy

**Barb Chambers**

Fred & Mary Jo Thatcher

**Misty Chapman**

Owen County Public Library

**Gary Collenbaugh**

Coal City High School Class of  
1960

**Carl Collins**

Fred & Mary Jo Thatcher

**Chuck Cooper**

John & Cindy Hackworthy

**Buddy Cunningham**

Tom & Jennifer Abrell

**Gene Davis**

Mary Ellen C. Smith

**Jack DeFord**

John & Cindy Hackworthy

**Tom Denny**

Tom & Jennifer Abrell

**Jerry Dreher**

Spencer High School Class of  
1958

**David Drescher**

Judy Drescher

**Jim Drescher**

Fred Drescher

**James “Jim” Ewald**

Babbs Supermarket

**Matthew Foster**

Clarence & Marlene Foster

**Ernest “Bill” Franklin**

Gary Franklin

**Myron E. Frye**

Spencer High School Class of  
1958

**Jim & Wilma Fulford**

John & Cindy Hackworthy

**Billie Garmon**

Maria O’Connor and Family

**Laura Gentry**

Tom & Jennifer Abrell

**Linda Gentry**

Robert & Linda Hancock  
Kimberly Tucker

**Bill Gillaspay**

Mary Ellen C. Smith

**John & Meme Gillaspay**

Rob & Cassie Babbs

**Meme Gillaspay**

John & Cindy Hackworthy

**Dwain & Carolyn Goldman**

Rob & Cassie Babbs

**Emma Greenwood**

Marilyn Sheppard DeFord  
Fred & Donna Dorsett

**Karen Grigg**

Owen County Court Services

**Sandra Hacker**

Owen County Court Services

**Barbara Hahn**

Mary Ellen C. Smith

**Michael Hahn**

Mary Ellen C. Smith

**Lucian Hall**

Owen County Court Services

**Pat Hayes**

Richard & Myrna Fields

**Terry Heck**

John & Julie LaMere

**Mildred Mae (Freeman)  
Hendricks**

Spencer High School Class of  
1970

# MEMORIAL GIFTS

## **Carol Herrington**

George Allison



## **Larry Hight**

Tom & Jennifer Abrell  
David & Patricia Barr  
Richard & Myrna Fields  
Robert & Linda Hancock  
Tina Hayden  
Ronald & Shirley Heidrick  
Lynn & Cheryl Hilbert  
Mike & Bonita Humphrey  
The Keeler Family  
Virginia Latham and Family  
Alyson McIntyre-Reiger  
The Moyer Family  
Edith Prater and Family  
Lonnie Rickey  
Roger Sherer  
Spencer-Owen School Staff  
The Teuton Family  
Darin & Carol Tucker  
William & Linda Vaughan  
Tom & Becky Wallace  
Larry & Judy Watson  
Kevin & Linda Wilson  
Bradley & Mary Wiseman

## **Bill Hightshoe**

Mary Ellen C. Smith

## **Pat Hill**

Braysville Homemakers  
Association  
Lewis-Worman Owners  
Association  
Jeffrey & Jennifer Schmidt  
Don & Linda Weilhamer

## **Jason Hinkle**

Richard & Myrna Fields

## **Wyatt Holsapple**

Teresa Frye

## **Nancy Hunt**

Mary Ellen C. Smith



## **Janet Kay Broadwell Hunter**

Rob & Cassie Babbs  
The Baxter Family  
Teresa Boruff-Young  
Adam Bowen  
The Chaffin Family  
Frank & Julie Coffin  
Paul & Dana Cummings  
Clare Dibble  
Eric Dieter  
Joe & Bette Dixon  
Richard & Myrna Fields  
John & Nancy Fuhs  
Kelsey Hanlon  
A.J. Hanson  
Tina Hayden  
Joe & Judy Heinmiller  
Don & Marilyn Jackson  
Jennifer Jackson  
The Jordanich Family  
Edward & Sharon Koscik  
Phyllis Lance and Family  
Penny Lane  
Bob & Carolyn Livingston  
Kevin & Patricia Lowther  
Jane Mellenthin  
Cheryl Moke  
Allen Mondell & Cynthia Salzman  
Mondell  
Anton Neff  
Boyd & Karen Osler

Kurt & Beth Petry  
Rob Ramsak  
Joan Reding  
Sally and Don Risser  
Jack & Linda Simmerman  
Kathy Spinks & Don Lamm  
Kirby & Ronda Stogsdill  
Mark & Holli Truesdel  
Darin & Carol Tucker  
Clark & Suzi Tyler  
Joyce Vaultier  
Matt Worland  
Jonathan Zucker

## **Jim Jacobs**

Larry & Nannette Johnson

## **Elizabeth Jones**

Robert T. Jones

## **Phoebe Kay**

Marilyn Sheppard DeFord  
Fred & Mary Jo Thatcher

## **JW Kelley**

Mary Ellen C. Smith

## **John King**

Brad & Robin King

## **Mr. & Mrs. Paul Laymon**

David Livingston

## **Jerry Lewis**

Rob & Cassie Babbs

## **Renos Litten**

Jim & Ginny Coppedge

## **Cynthia A. Livingston**

David Livingston

## **Mr. & Mrs. Robert Livingston Jr.**

David Livingston

## **Tom Marsh**

Maria O'Connor

## **Gary McCarter**

Sam & Carolyn McCarter  
TJ & Leslie McClure  
Leonard & Joan Wray



**Kenneth McCollum**

Lisa Bassett and Family  
 Kimberley Frazier and Family  
 Jane McCollum  
 Mark McCollum and Family

**Janice McHenry**

Joyce Crouch  
 Joe & Brenda King  
 Devon & Margaret Sims  
 Marilyn Truesdel  
 Phyllis Tucker

**John McMullen**

Maria O'Connor

**Phyllis Melko**

Steve & Alice Parrish

**Janice Melton**

Robert & Linda Hancock

**Lewis "Lew" Moke**

George Allison  
 American Legion Post 285  
 Babbs Supermarket  
 Heidi Bednarski  
 George & Kim Bergan  
 John Bonner  
 Dean & Marcia Bruce  
 Craig Burris  
 Jon & Janet Chaffin  
 Denise Clark  
 Commonwealth Engineers, Inc.  
 Jim & Ginny Coppedge  
 Steve & Peggy Cradick  
 Richard & Wynn Ann Czubik  
 Wally & Kathy DeFord  
 Kim Dilts  
 Dan & Lou Ann Easton

Ken & Lisa Eldridge  
 Richard & Myrna Fields  
 John & Nancy Fuhs  
 Mark Genung  
 Brad & Brittany Greene  
 Rich & Terri Grimes  
 John & Cindy Hackworthy  
 Melissa Harris  
 Marilyn A. Hart  
 Tina Hayden  
 John & Deanna Heckman  
 Hickam & Lorenz, P.C.  
 Stephen & Patricia Holzinger  
 Insurance Services, Inc.  
 Larry & Nannette Johnson  
 Tonya Jones  
 Richard & Connie Kay  
 Janee Kile  
 Bob & Carolyn Livingston  
 Richard & Nancy Lorenz  
 Jim Mako  
 Jane Mellenthin and Family  
 Larry Metzler  
 Cheryl Moke  
 Steve & Sharon Moke  
 Beth Nairn  
 Anton & Shannon Neff  
 Maria O'Connor  
 Owen County Democratic Party  
 Annette Pardue  
 Steve & Alice Parrish  
 Amy Paul  
 Megan Price  
 Gary & Lori Quillen  
 Kelly Raaf  
 John & Hallie Richards  
 Mark & Pennie Rogers  
 Janet Rummel & Thomasina  
 Marsili  
 Dianna Shewmaker  
 Spencer-Owen Education  
 Association  
 Kathy Spinks  
 St. Bernard de Clairvaux No 256  
 Ed & Joani Staubach  
 Kirby & Ronda Stogsdill  
 Denise Sudol & Karah Bobeck  
 The Becher Family  
 Darin & Carol Tucker  
 Doug & Judy Tucker  
 Scott & Karen Uhlhorn  
 Tom & Becky Wallace  
 Aerial White

Michael Yamashita

**Tony Morrison**

Rob & Cassie Babbs  
 Spencer High School Class of  
 1970

**Norman Mouser**

David Livingston

**Betty Oberholtzer**

Rob & Cassie Babbs  
 Dave & Barbara Brinson

**Drew O'Connor**

Gail O'Connor  
 Maria O'Connor  
 Pete & Lois Sparrock

**Jack O'Connor**

Maria O'Connor

**James "Jim" Query**

Babbs Supermarket  
 Robert T. Jones  
 Bob & Carolyn Livingston

**Terry Lee Quillen**

Alan & Donna McElroy  
 Fred & Mary Jo Thatcher  
 Kimberly Tucker

**Patty Sadler**

Walter Sadler

**Emalou Schaffer**

Mary Ellen C. Smith

**Gretchen Scholl**

George Allison  
 Alpha Delta Chapter of Tri Kappa  
 Jim & Ginny Coppedge

# MEMORIAL GIFTS

John & Sylvia Dyar  
John & Nancy Fuhs  
John & Deanna Heckman  
Larry & Nannette Johnson  
John & Mary Jane Liming  
Richard & Nancy Lorenz  
Charles & Bonnie Macy  
Jane McCollum  
Alan & Donna McElroy  
Maria O'Connor  
Jenifer Olson  
Owen County Community  
Foundation Board and Staff  
Gary & Lori Quillen  
Mary Gates Rice  
Dave & Doris Scully

## **Liz Shields**

Phillip Allen  
John & Sylvia Dyar  
Glenda Winders

## **Jill Shotwell**

Marilyn Sheppard DeFord

## **Bob Shouse**

Gerald Wells

## **Herbert & Wilma Skinner**

Jane Mellenthin

## **Dan V. Smith**

Mary Ellen C. Smith

## **Kris Berry Smith**

Tom & Jennifer Abrell

## **Brandon Staley**

Judge Lori Quillen and Staff  
Owen County Court Services  
Tad & Shirley Wilson

## **Dorothy Steiner**

Mark & Eleanor Steiner

## **Marion Steiner**

Mark & Eleanor Steiner

## **Steve Steiner**

Mark & Eleanor Steiner

## **Frank & Betty Stewart**

Jane Mellenthin

## **Roger Stewart**

Dave & Barbara Brinson

## **Ryan Stough**

Larry & Nannette Johnson

## **Warren Thacker**

Dave & Barbara Brinson

## **William Truax**

Michael Dean

## **Gib Tucker**

Darin & Carol Tucker  
Dirk & Sherry Tucker  
Phyllis Tucker

## **Zach Tucker**

John & Cindy Hackworthy  
Dirk & Sherry Tucker  
Phyllis Tucker

## **James "Jim" VanBuskirk**

Gary & Judy Armstrong  
Babbs Supermarket  
Gosport Lions Club  
John & Deanna Heckman  
Joe & Brenda King  
Bob & Carolyn Livingston  
Kevin & Donna Wampler

## **Jim Vance**

John & Cindy Hackworthy

## **Norma Jean Walker**

David Friedel & Ann Mahrtdt

## **John Wardlaw**

Ed & Joan Staubach

## **Erika Wells**

Gerald Wells  
Gordon & Diane Wells  
Bob & Cindy White

## **Nelda K. Wells**

Gerald Wells

## **Leroy Whaley**

Joyce Graham

## **Paul Whaley**

Joyce Graham

## **Steve Williamson**

Alan & Donna McElroy  
Owen County Republican Party

## **Jerry Wilson**

Steve & Alice Parrish

## **Roma Wilson**

Stanley & Nancy Griffith  
John & Cindy Hackworthy  
Steve & Alice Parrish



## **Shirley Wilson**

George Allison  
Rob & Cassie Babbs  
Penny Carpenter  
Wally & Kathy DeFord  
Marilyn Sheppard DeFord  
Michael & Julie Donham  
Linda E. Thomas  
John & Cindy Hackworthy  
Marilyn A. Hart  
Insurance Services, Inc.  
Loretta Johnson  
Mary Lou Gray Karseboom  
Bob & Carolyn Livingston  
David Livingston  
Craig & Julie Money  
Charles & Marge Neumeyer  
Steve & Alice Parrish  
Mark & Pennie Rogers  
Don & Lori Rudzinski  
Dave & Doris Scully  
Ray & Mindy Sieradzan  
Jack & Linda Simmerman  
Charles & Carolyn Steele  
Patricia Tolbert  
Kimberly Tucker  
Phyllis Tucker



Brandy Williamson  
David Wilson  
Wilson Printing

### Max Wood

Hickam and Lorenz, P.C.  
Janet Rummel & Thomasina  
Marsili  
Dave & Doris Scully  
Louise Spencer  
Ed & Joani Staubach  
John & Julia Wickes  
Arlana Wood



### PFC Brett Everett Wood

American Legion Auxiliary Unit  
No 285  
American Legion Post 285  
Bill Ranard Auto Repair  
Bob's Gun Shop  
Byers Home Furnishings  
Casida Barber Shop  
China Wok  
Doggy Style Pet Salon  
Edwards Motors, Inc.  
Fuhs Attorney at Law  
Gosport VFW Post 7850  
Green Dental of Owen County  
Hair Designs by Kathy  
Home Team Properties  
Ideal Credit Corporation  
Insurance Pro's LLC  
Insurance Services, Inc.  
John Brighton VFW 7850  
Auxiliary  
Levy Heating & Cooling  
Low Bob's Discount Tobacco  
Mercer Realty  
Mohr's Motors LLC  
Cheryl Moke



### Zach Tucker

In the wake of eight-year-old Zach Tucker's passing after a courageous battle with cancer, his family wanted to leave a positive impact on Owen County residents. In 2009, they established the **Cancer Support Fund** to assist Owen County families with some of the significant extra expenses associated with cancer treatment. The fund was established with a gift from Zachary's grandparents, Gib and Phyllis Tucker of Spencer, who were looking for a special way to celebrate Zachary's short but full life. Funds are currently available for Owen County families dealing with the extreme financial demands of cancer treatments. Please contact the OCCF for more information.



### Linda Brooks York

After many years of living with a brain injury, Linda Brooks York passed away in February 2021. Not long after, her daughter Wendy contacted the Foundation in hopes of creating a memorial fund to help others who are living with the same disability that her mother experienced. The result was the **Linda York Memorial Fund**, which exists to provide necessary services and products to families dealing with brain injuries. This fund is still growing and has yet to reach endowment status where perpetual support can be provided. If you are interested in donating to this fund, please visit the donation page on our website.

Don Nicholson  
Our Community Bank  
Owen County Democratic Party  
Owen County Home Company  
Owen County State Bank  
Mary Rice  
Janet Rummel  
Sons of American Legion  
Spencer Coffee House  
Spencer Exchange Club  
Studio 560  
Unraveled Quilt Store  
Valley Optical  
Valvoline Express Care  
VFW Auxiliary Post 1405  
West & Company Realtors  
West & Parrish & Pedigo  
World Arts Printing, Inc.

### Mary Wright

Tom & Jennifer Abrell

### Linda Brooks York

Kathy Blackburn and Team  
Richard Jaynes  
Linda Morris  
Jeff & Carol York

*Every effort is made to ensure your name and your Tribute and/or Memorial is written as you wish. If your name or recipient is incorrect or you wish to be listed differently, please contact us by phone, email, or regular mail.*

# OCCF FUNDS

## LIST OF FUNDS

To contribute to any of these funds or to learn more about them, please visit our website at [www.owencountycf.org](http://www.owencountycf.org) and click the Donate button. If you are interested in starting your own fund, please call Karah Bobeck at 812.829.1725 or email to [karah@owencountycf.org](mailto:karah@owencountycf.org).

### Community Funds

Community funds provide flexibility to address the every-changing needs of the community and to enhance the quality of community life. They are used to fund competitive grant applications submitted by nonprofit organizations in Owen County.

Bob Babbs Community Fund  
Community Fund  
DeCoursey Family Fund  
D M J Community Fund  
Eugene S. Bowen and Robert D.  
Bowen Fund for Owen County  
Friedel - Mahrtd Community  
Fund  
Glenn T. Burns Fund  
Hackworthy Family Community  
Fund  
Harold & Lois Patterson Fund  
Harry C. & D. Gladys Miller Fund  
Jack Simmerman Community  
Fund  
John T. Gillaspy Memorial Fund  
Misty Chapman Memorial Fund  
Morgan L. Drescher Family Fund  
Nancy McKay and Richard Wayne  
Lorenz Family Fund  
Ooley Family Fund  
Paul & Ione Fulk Community Fund  
Rogers - Pennington Fund  
SCI REMC RoundUp Fund  
Scully Family Fund  
Smithville Telephone Company  
Community Fund  
Tucker Family Fund  
Wells Family Fund

### Field of Interest Funds

Field of Interest funds allow donors to specify a cause, geographic area, or population for which the funds are to be used. The Foundation awards grants to organizations within the specific field of interest designated by the donor. The following funds are fulfilling the charitable intentions of their founders by meeting our community's needs in the fields of their choice.

Boston Scientific Childcare Fund  
Cancer Support Fund of Owen  
County  
Cataract / Jennings Township  
Fund  
Child Abuse Prevention Fund  
Coal City - Jefferson Township  
Fund  
Community Medical Fund  
Doug Dalton Memorial Fund  
Fire & Emergency Fund  
Freedom - Franklin Township  
Fund  
Freeman Charitable Food Fund  
Gosport Fund  
John King Fund for Owen County  
Law Enforcement Fund of Owen  
County  
OCCF Support Our Schools  
(SOS)  
SCI REMC Disability Fund  
Smithville Charitable Foundation  
Fund  
**Veterans Project Fund (New)**  
Winters & Shouse Cemeteries  
Fund

### Donor Advised Funds

Many of our donors maintain an active interest in OCCF's activities by participating in a grantmaking partnership through Donor Advised Funds. These funds allow donors to make suggestions for distributions to specific charities. Many donors tap into the Foundation's expertise to assist then in identifying the needs of the community.

Allison Family Fund  
**David Friedel - Ann Mahrtd  
Donor Advised Fund (new)**  
**Joani & Ed Staubach Donor  
Advised Fund (new)**  
John Heckman Athletic Fund  
John R. & Elizabeth Rogers Fund  
REALTOR Fund  
Willie & Pat White Fund  
**Wisley, Mead, Hume Donor  
Advised Fund (new)**

### Designated Funds

Each of the following Designated Funds represents the charitable passions of a person or agency in our community. Thank you for your commitment to improving Owen County.

Bennie J. & Joan R. Woodruff  
Methodist Church Fund  
Bonness Family Fund  
Carolina Cemetery Fund  
Economic Development Fund  
Flona Every Query Fund  
Gosport History Museum Fund  
Irene & Arthur Kelley Beech  
Cemetery Fund  
Irene & Arthur Kelley  
Patrickburg Lutheran  
Cemetery Fund  
Jack R. DeFord Library Fund  
Jim Vance Owen County YMCA  
Fund

J. Welch Wampler Fund  
 Lloyd H. & Rosalie E. Lucas 4-H & FFA Fund  
 McCormick's Creek State Park Fund  
 MYPPath Fund  
 O'Connor Family Fund  
 Owen County 4-H Livestock Fund  
 Owen County Education Fund  
 Owen County Humane Society Fund  
 Owen County Ministerial Fund  
 Owen County Preservation Fund  
**Owen Valley Band Boosters Fund (new)**  
 Owen Valley Jr ROTC Fund  
 Riverside Cemetery Fund  
 Senior Friends of Owen County Fund  
 St. Jude Catholic Church Fund  
 Tivoli Theatre Endowment  
 William Donald & Maxine Wells - Fiscus Cemetery Fund

## Agency Funds

Nonprofit organizations are vital to the success and growth of our community. The following Agency Funds work to ensure each organization's security, stability, and long-range financial planning, while helping them to fulfill their mission.

Area 10 Agency on Aging Fund  
 Spencer Pride Capital Fund

## Scholarship Funds

Scholarship funds help students to realize their dreams of a college education. In addition to scholarships that benefit high school seniors, there is a growing need to support post-high school educational opportunities for individuals who didn't finish their college educations, need to be re-trained, or are in advanced fields of study.

Bennie J. & Joan R. Woodruff Scholarship Fund  
 Braysville Homemakers Scholarship Fund  
 Burns Family Scholarship Fund  
 Charles T. Cooper Scholarship Fund

Charles W. Edwards Scholarship Fund  
**Clinton & Louise Abrell Scholarship Fund (new)**  
 Coyne Family Scholarship Fund  
 David Campbell Gray Scholarship Fund  
 Dick (Mr. Dyar) & Sue Dyar Scholarship Fund  
 Dyer Family Scholarship Fund  
 Elliot Hickam Scholarship Fund  
 EPIC Scholarship Fund  
 Freedom Alumni Scholarship Fund  
 Gary McCarter Scholarship Fund  
 George & Nancy Thurston Artistic Fund  
 Geraldine & Wilma Bucklew Educational Scholarship Fund  
 Gosport Alumni Scholarship Fund  
 Gosport Lions Club Scholarship Fund  
 Ione W. Fulk Scholarship Fund  
 James P. Root Scholarship Fund  
 Jefferson Township / Coal City Alumni Scholarship Fund  
 Jeffrey Wayne Johnson Scholarship Fund  
 Jim & Wilma Fulford Scholarship Fund  
 John Moore Scholarship Fund  
 Josephine Brown Owens Scholarship Fund  
 Judy Hamilton Education Scholarship Fund  
 Lloyd H. & Rosalie E. Lucas Agri-Science Scholarship Fund  
 Loretta Heidrick Memorial Scholarship Fund  
 Lyle & Marion Brighton Scholarship Fund

### **MacMorran Family Scholarship Fund (new)**

Margaret Marley Pinkston Scholarship Fund  
 Mearl & LaVerne Brown Scholarship Fund  
 Melvin R. & Margaret A. Hall Nursing Scholarship Fund  
 Michael D. Magner Scholarship Fund

Michael Job Scholarship Fund  
 Mildred E. Harbison Scholarship Fund  
**Monroe, Long, & Butts Vocational Scholarship Fund (new)**  
 Morgan L. Drescher Family Scholarship Fund  
 Myrtle S. Marshall Business Scholarship Fund  
 Our Community Bank Scholarship Fund  
 Owen County Farm Bureau Scholarship Fund  
 Owen County I.U. Varsity Club Scholarship Fund  
 Owen Valley FFA Scholarship Fund  
 Patricksburg Alumni Scholarship Fund  
 PFC Brett Wood Memorial Scholarship  
 Quincy Alumni Scholarship Fund  
 Robert & Barbara Stanley Bonness Scholarship Fund  
 Roma Wilson Scholarship Fund  
 Ronald E. & Carol L. Patterson Dillingham Scholarship Fund  
 Sons of American Legion Joe Carmichael Memorial Scholarship  
 Spencer Alumni Scholarship Fund  
 Tri Kappa Scholarship Fund  
 Vada Baker Scholarship Fund  
 West & Parrish & Pedigo Scholarship Fund  
**William Truax Family Scholarship Fund (new)**  
 Wood & Barry Franklin Scholarship Fund

## Operating Funds

These funds provide support for the administrative expenses of the Foundation in our ongoing work to foster philanthropy in our community.

OCCF Operating Fund  
 Visionary Fund Operating Endowment

# OCCF FUNDS

## Growing Funds

Garrard Chapel Church & Food  
Pantry Fund

*Janet Hunter Memorial Fund  
(new)*

*Kirby Stogsdill Memorial Fund  
(new)*

*Linda York Memorial Fund (new)*

Owen Valley Alumni Association  
Fund

Owen Valley Alumni Scholarship  
Fund

Spencer Pride Fund

Veterans of Owen County Fund

Fireworks Fund

Gosport Playground Fund

Gosport VFD Fund

Gosport Waterfront Project Fund

*On My Way Pre-K Program*

*Support Fund (new)*

Owen County CASA Fund

Owen County Fair Association  
Fund

Rebecca & William Applegate  
Scholarship Fund

Soil & Water Conservation  
District Fund

*Spencer VFW Auxiliary Post 1405*

*Special Project Fund (new)*

## Pass-Through Funds

Adult Guardianship Program  
Owen County Fund

Babbs Supermarket Scholarship  
Fund

Community Christmas Fund

Community Detention

Alternatives Initiative Fund

Disaster Recovery Fund

Erika Wells Memorial Scholarship  
Fund



## Joanne Drescher Caudill

Knowing that she wanted to honor her father and their family while giving back to the community in which she was born and raised, Joanne Drescher Caudill contacted the Owen County Community Foundation in 2010 to establish two future funds through a bequest from her estate. Joanne passed away this year in Mesa, Arizona at the age of 96. Her bequest created the Morgan L. Drescher Family Fund, allowing OCCF to provide large impact grants, and the Morgan L. Drescher Family Scholarship Fund, providing OCCF's largest scholarship award. Thank you, Joanne; your family's legacy will live on and be fulfilled for generations to come.



# CREATE A FUND

## Steps to Create Your Own Fund

The Owen County Community Foundation exists to help caring people like you give back to the causes and community you care about most. We make giving easy and effective and can establish your fund in five simple steps:

### 1. CHOOSE YOUR PASSION

Do you want to impact Owen County students' education? Increase our community's health? Nurture the arts? We will work with you to select the field of interest, community cause or non-profit organization you want to support forever with your endowed gift.

### 2. CHOOSE WHEN TO GIVE

Do you want to establish a fund today so you can witness its impact during your lifetime? Would you prefer to defer your gift through a will or other planned giving option? Our staff works with you and/or your professional advisor to determine how you can achieve your charitable goals.

### 3. CHOOSE WHAT TO GIVE

You can give cash, stocks, property, bequests and or a variety of other assets. Due to our years of combined experience, we are able to handle the most complex transactions and turn unusual gifts into community good.

### 4. CHOOSE A TYPE OF FUND

OCCF offers various types of funds to help you fulfill your goals: unrestricted, field of interest, designated, donor-advised and scholarship. Each provides different degrees of participation and flexibility, but all allow you to partner with OCCF to create greater good together.

### 5. ESTABLISH YOUR LEGACY

OCCF will walk you through the necessary paperwork to establish your fund and explain the investment and spending policies and other pertinent processes. You'll finalize any initial gifts to your fund and confirm your investment in the future of the Sweet Owen community you love.

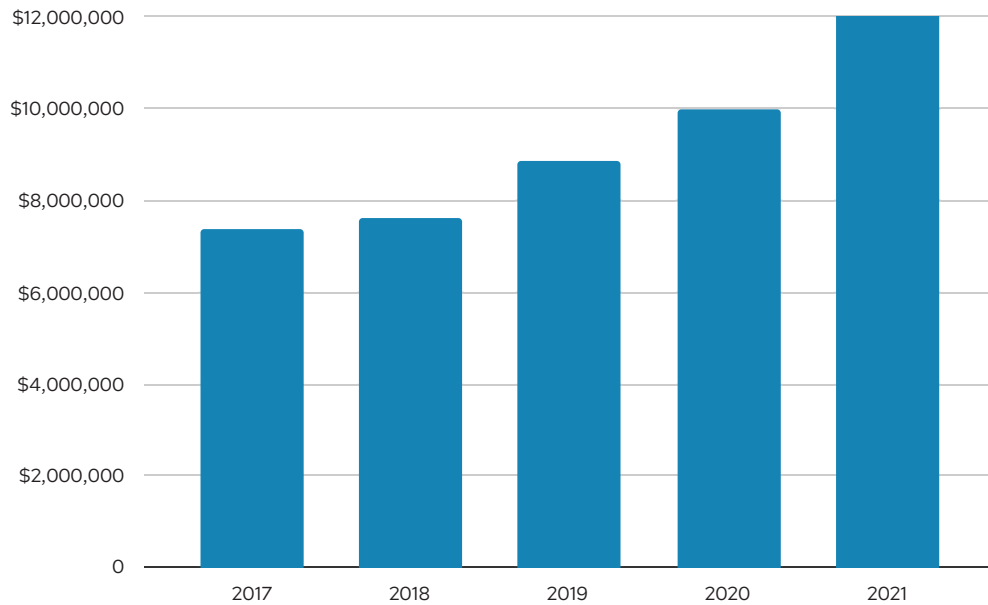
# FINANCIAL OVERVIEW

Condensed Statement of Financial Position • December 31, 2021

	2021	2020
<b>ASSETS</b>		
Cash	\$389,114	\$933,948
Investments	11,678,340	8,927,229
Other Assets	88,353	133,255
<b>TOTAL ASSETS</b>	<b>\$12,155,807</b>	<b>\$9,994,432</b>
<b>PUBLIC SUPPORT &amp; REVENUES</b>		
Total Contributions	\$1,656,056	\$1,009,944
Administrative Fees	200,321	144,432
Net Investment Income	1,475,118	884,546
Other Income	19,716	4,264
<b>TOTAL SUPPORT &amp; REVENUES</b>	<b>\$3,351,211</b>	<b>\$2,043,186</b>
<b>EXPENSES</b>		
Grants & Scholarships	\$951,909	\$788,416
General Administrative	125,671	89,462
Fundraising & Development	169,336	113,882
<b>TOTAL EXPENSES</b>	<b>\$1,246,916</b>	<b>\$991,760</b>
<b>CHANGE IN NET ASSETS</b>	<b>\$2,104,295</b>	<b>\$1,051,426</b>
<b>NET ASSETS BEGINNING OF YEAR</b>	<b>\$9,793,736</b>	<b>\$8,742,310</b>
<b>NET ASSETS END OF YEAR</b>	<b>\$11,898,031</b>	<b>\$9,793,736</b>

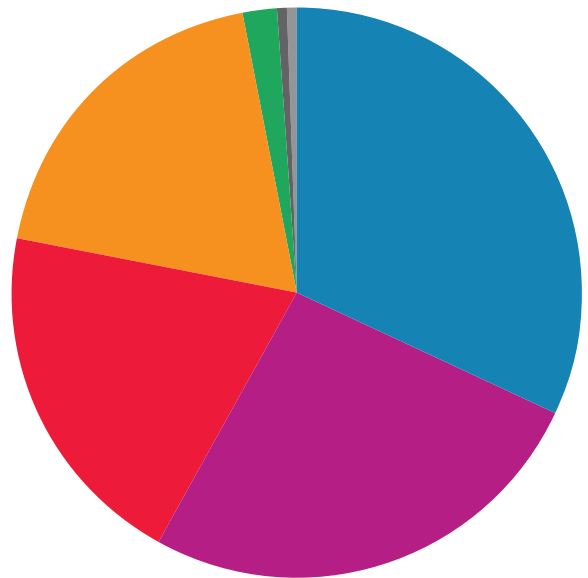
Note: the 2020 information is an excerpt of the audited financial statements. The 2021 information is currently under audit and is subject to change. Complete financial statements are available for inspection in our office at 60 E Market St, Spencer, Indiana. The Owen County Community Foundation is an independent tax-exempt 501(c)(3) charitable organization.

## TOTAL ASSETS



## ASSETS BY FUND TYPE

COMMUNITY GRANT	\$3,345,619
SCHOLARSHIPS	\$2,737,735
DESIGNATED	\$2,067,339
FIELD OF INTEREST	\$1,990,174
DONOR ADVISED	\$196,906
AGENCY	\$61,779
SPECIAL PROJECT	\$55,863



The community foundation board, finance committee, and staff ensure rigorous fiscal transparency. The community foundation, in its commitment to its missions, vision, and core values, holds itself to the highest standards of stewardship and philanthropy in its effort to improve the quality of life in Owen County.

# OCCF BY THE NUMBERS

## *The Power of Giving*

### 27 Years Invested in Owen County Communities!

2,459

Number  
of donors  
since 1994

Honorarium &  
Memorial Gifts

\$1,076,615

Donated in honor  
of memory of loved  
ones in 2021

FACTS OF GIVING

3 of 4

Donations received  
in 2021 were \$100  
or less

Granted in 2021

\$92,271

Designated  
Grants

\$3,500

Donor-Advised  
Funds

\$157,345

Community  
Grants

\$171,074

COVID-19 Recovery Grants

Scholarships

\$2.4 million

Total scholarships since 1994

1,011

scholarships given to 594 high school,  
college, & vocational students since 1994

\$10.4 million total  
gifts since 1994

\$11.9 million total  
assets since 1994

\$44,703 total teacher  
funding since 1999

100% dedication  
to Owen County

\$483,384 total grants to MYPath



# 2021 BOARD OF DIRECTORS



**David Friedel**

Chairperson  
*Freedom, IN*



**Susan Coulter**

*Freedom, IN*



**Rob Babbs**

Vice Chairperson  
*Spencer, IN*



**Marilyn Hart**

*Poland, IN*



**Myrna Fields**

Secretary  
*Spencer, IN*



**Brad King**

*Spencer, IN*



**Kaye Erney**

Treasurer  
*Poland, IN*



**Heather Light**

*Spencer, IN*



**Tom Wallace**

Member At Large  
*Freedom, IN*



**Grant Minnemeyer**

*Spencer, IN*



**Nancy Lorenz**

Past Chairperson  
*Spencer, IN*



**Amber Mullin**

*Spencer, IN*



**Barbara Bonness**

*Gosport, IN*



**Dale Walker**

*Freedom, IN*

# 2021 COMMITTEES

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## EXECUTIVE COMMITTEE

David Friedel - Board Chairperson  
Rob Babbs - Vice Chairperson  
Myrna Fields - Secretary  
Kaye Erney - Treasurer  
Tom Wallace - Member At Large  
Nancy Lorenz - Past Chairperson

## FINANCE COMMITTEE

David Friedel - Committee Chair  
Kaye Erney  
Keith Knipstein  
Kurt Rosenberger

## GOVERNANCE COMMITTEE

Rob Babbs - Committee Chair  
Myrna Fields  
Marilyn Hart  
Tom Wallace

## LOCAL SCHOLARSHIP COMMITTEE

Myrna Fields - Committee Chair  
Dave Allen  
Jordan Bland  
Amber Mullin  
Ed Staubach

## LILLY SCHOLARSHIP COMMITTEE

Myrna Fields - Committee Chair  
Shelley Harriman  
Audra Hopf  
Jeanna Srinivasan  
Ronda Stogsdill  
Don VanDerMoere

## POST-SECONDARY SCHOLARSHIP COMMITTEE

Myrna Fields - Committee Chair  
Kaye Erney  
Tamra Ranard

## VO-TECH SCHOLARSHIP COMMITTEE

Myrna Fields - Committee Chair  
Brad King  
Chris Parren  
Ale Young

## GRANTS COMMITTEE

Tom Wallace - Committee Chair  
Danielle Conner  
Susan Coulter  
Ashley Fleetwood  
Grant Minnemeyer  
Leslie Nieves  
Judy Sebastian  
Denise Sudol  
Brittany VanHook

## STRATEGIC PLANNING CORE TEAM

David Friedel  
Myrna Fields  
Marilyn Hart  
Heather Light

## JFO COMMITTEE

Wally DeFord  
John Dyar  
Brad King  
Julia King  
Grant Minnemeyer

## COAD COMMITTEE

Dale Walker

# OCCF STAFF



## Janet Rummel

**President & CEO**



[ceo@owencountycf.org](mailto:ceo@owencountycf.org)

In mid-2020, Janet Rummel was selected by OCCF's Board of Directors as the new President & CEO of our local charity. Janet is a ten-year resident of Owen County, and before joining our team, she served as Director of Community Initiatives at the Indiana University Center for Rural Engagement. Janet is the third executive to lead the OCCF in its 27-year history.



## Maria O'Connor

**Senior Director of Programs & Administration**



[maria@owencountycf.org](mailto:maria@owencountycf.org)

Maria has been with the OCCF since January 2015; she brings a decade of nonprofit experience and a lifetime of giving. The O'Connor Family moved to Owen County to raise their two children. Maria is responsible for managing Foundation operations in her role as Administrative Director and also directs the OCCF Grants and Scholarships programs.



## Karah Bobeck

**Director of Development & Communications**



[karah@owencountycf.org](mailto:karah@owencountycf.org)

Karah graduated from the Kelley School of Business at Indiana University - Bloomington in 2019 with a focus in marketing and professional sales. Karah is passionate about helping donors fulfill their philanthropic wishes, maintaining and improving the sustainability of the OCCF, and giving back to the community where she grew up.



**OCCF**  
P.O. Box 503  
Spencer, IN 47460