

# Dream. Share. Build. OUR COMMUNITY.



Annual Report 2017



# Message

## From our Board



What an exciting year for Harrisonburg and Rockingham County! Over the past year, TCFHR distributed more than \$6 million in grants (a record year!) to community organizations, and religious and educational institutions, many at the request of individual donors in our community. Our assets have grown to over \$36 million on the strength of almost \$5.0 million in gifts. But our accomplishments are so much more than that!

This past fall, The Community Foundation realized a dream when it opened the Plecker Center for Community Philanthropy. This center, while serving as the permanent home for TCFHR, also provides the opportunity for vital collaborative space for other community agencies. The Foundation Board is committed to assisting community nonprofits and considers this center an important part of its mission, as it is another way TCFHR can help those organizations help our community.

TCFHR is engaged in the process to maintain its accreditation by the Council on Foundations. This national reaccreditation process ensures that TCFHR is operationally sound, employs philanthropic best practices, and is in legal compliance. The Board and staff are committed to operating the Foundation in a manner that meets the high standards expected by you.

A new project, the [Great Community Give](#) (GCG), was approved by the Board this past year. The inaugural event, which will be held on April 18, 2018, has consumed a great deal of time for the Board and staff this past year as we seek to provide a new avenue for our community to support the important work done by so many local nonprofit organizations. We are excited to sponsor this upcoming event!

TCFHR's Board of Directors strives to ensure that new initiatives are in keeping with our mission and enhance our relationships and ability to meet the needs of Harrisonburg and Rockingham County. We sincerely appreciate the opportunity to serve this community and look forward to continuing to work with you to impact concerns that are important to you.

A handwritten signature in black ink, appearing to read "Joseph S. Paxton".

Joseph S. Paxton  
Chair



### MISSION

Strengthening our communities through purposeful giving and active engagement.



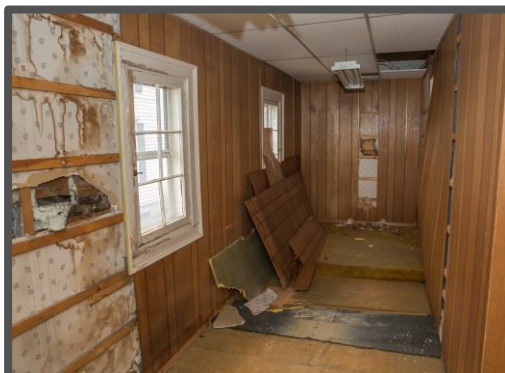
# Dream.

## Eastham House – restoring a place to call home



Since 2006, The Community Foundation offices were located upstairs in The Smith House, where the staff enjoyed sharing space with [Arts Council of the Valley](#). In recent years, a growing staff required additional space and the need for first floor access for donors became apparent. With encouragement and support from the Board of Directors, TCFHR began the search for a new location in late 2015.

In April 2016, Harrisonburg City Council approved a proposal from The Community Foundation to acquire the Eastham House. The dream that TCFHR would have a permanent home became a reality!



An enclosed sleeping porch was transformed into a kitchen for staff use and tenant events



TCFHR partnered with Blue Ridge Architects, Sustainable Solutions of Virginia, Inc., F&M Bank and Virginia Community Development Corporation on this project. Together, they assisted in the pursuit of Virginia State Historic tax credits to help fund the renovation. The collaboration and team approach of these organizations with The Community Foundation staff was invaluable to the success of the project.

**KEYSTONES** – We express our gratitude to the Keystone members who gave generously to operations to help establish The Community Foundation while it was in its infancy. These individuals and businesses believed in The Community Foundation before it had a proven track record and before the dream of a permanent home was conceived. Please visit [www.tcfhr.org](http://www.tcfhr.org) to know these charitable individual and corporate contributors.



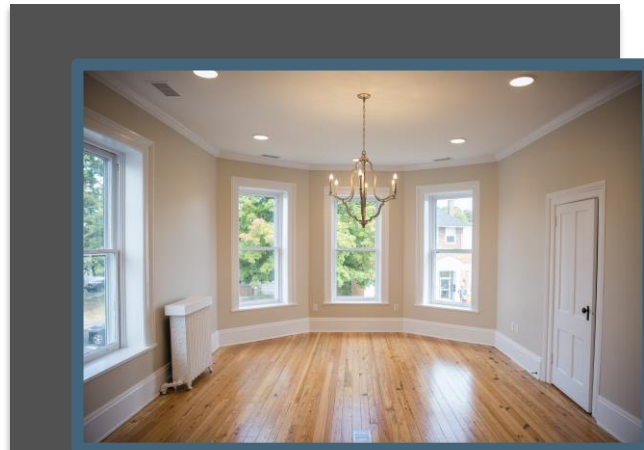
Sustainable Solutions Project Manager, Denny Riggleman, preserving original masonry walls during renovation

# Share.

## Creating space for 7 local nonprofit organizations



Blue Ridge Court Appointed Special Advocates (CASA) is a nonprofit organization which trains volunteers to become Court Appointed Special Advocates for abused and neglected children in our community.



Shared conference room space

"Moving to the new office, Blue Ridge CASA is looking forward to more visibility in a downtown location, being surrounded by a supportive team of nonprofit organizations, and having accessible space for training and educating community members to advocate for children who have been abused and neglected."

**Margaux Beri, CASA Advocate Manager in H/R**



Office space



Open Doors (formerly *HARTS*) is a nonprofit organization that engages volunteers from the Harrisonburg & Rockingham County community to provide shelter, compassionate support and access to services for people who are homeless.



Valley Fellowship of Christian Athletes (Valley FCA) is a nonprofit organization that engages coaches and athletes to grown in their faith and sport.

## alzheimer's association®

The Central and Western Virginia Chapter of the [Alzheimer's Association](#) is a nonprofit organization that seeks to eliminate the incurability of Alzheimer's disease through the advancement of research, and to enhance the care and support for individuals, their families, and caregivers affected by the disease.



The Community Foundation foyer  
on the main level

**"As we strive to enhance concern for Alzheimer's and dementia, as well as awareness of the Alzheimer's Association mission to increase research, support ALL impacted by Alzheimer's/dementia and promote brain health, we are very pleased to be located in the new Community Foundation building. Together, we will make an even greater difference in our community."**

**Sue Friedman, M.S., President/CEO  
Alzheimer's Association, Central & Western VA**

[Autumn Valley Guardianship](#) is a nonprofit organization serving as a caring public guardianship program of last resort, striving to make ethical decisions based on the clients' known wishes and desires, and to ensure quality living and death experiences, carried out with integrity and dignity, for each individual in their care.



The historic Eastham House provides a permanent home for  
The Community Foundation  
on the main level of the structure.

## [Way to Go, Inc.](#) *Your Key to Success!*

[Way to Go](#) is a nonprofit organization committed to helping families in the Harrisonburg & Rockingham County community become more self-sufficient and financially independent by assisting them with urgent vehicle transportation needs.



# Build.

## Plecker Center for Community Philanthropy

*All photography of The Plecker Center for Community Philanthropy  
by Bob Adamek*

The dream of our new home was made possible by The City of Harrisonburg and its gift of The Eastham House to The Community Foundation.



The Community Foundation moved its offices on October 9, 2017. In November, with the addition of five other organizations, the Plecker Center for Community Philanthropy serves as a unique and collaborative nonprofit space in downtown Harrisonburg. The sixth tenant will move into the last available office in March 2018.

The renovation of the building was generously funded by Mrs. Frances Plecker and many other Community Foundation donors, with Virginia State Historic tax credits, and with the award of a large grant from The Cabell Foundation.



Carpet was removed to reveal beautiful hard wood floors throughout the house, as shown here in a shared conference room and office space on the main level.



Rear of the building, which provides two entrances to Garden Level offices



Frank Tamberrino and Greg Godsey of the Harrisonburg - Rockingham Chamber of Commerce hold the ceremonial ribbon as Board Chair, Joe Paxton, and Executive Director, Revlan Hill, cut it to commemorate the newly renovated space at 317 S. Main Street.

Time to celebrate as TCFHR Board members, tenants and TCFHR staff commemorate the opening of The Plecker Center for Community Philanthropy with members of the local community during the [Harrisonburg-Rockingham Chamber of Commerce](#) ribbon cutting ceremony on November 29, 2017



# OUR COMMUNITY.

## Harrisonburg & Rockingham County

### TCFHR Accomplishments

- Established 17 new funds
- Funded 29 local Fire & Rescue departments, totaling \$40,255, through LD&B Matching Campaign
- Provided CE credit hours for 17 local professionals advisors through an estate & charitable gift planning seminar
- Promoted projects of 60 local nonprofit organizations through the [Community Needs](#) grant process – 4 were fully funded and 15 partially funded
- Distributed \$6,920,607 in grants during the 2016-17 fiscal year
- Contracted an independent expert consultant to perform an Information Technology Risk Assessment and implemented a plan of action to minimize cyber security risk for TCFHR.

### 2017 IMPACT Grants



[IMPACT Harrisonburg](#), a giving circle for young professionals, presented its annual grants on November 2, 2017. Projects submitted through the Community Needs process were eligible for consideration. The following local organizations benefitted:

- \$500 to Our Community Place **Kitchen Enterprise** project
- \$500 to Explore More Discovery Museum **Maker City** project
- \$5,335 to United Way of H/R **We Read to Succeed** project

IMPACT members gather at noon once a month at Beyond, on the 3<sup>rd</sup> Wednesday. The group encourages individuals in their 20s, 30s and 40s, who wish to support our local community to come!



## TCFHR Accomplishments

“I can’t begin to say thank you enough for your generosity that has allowed me to seek these opportunities. It’s unbelievable that I only have two more semesters left. I’m starting to think about graduation as a concrete idea instead of a sought-after dream. I had a professor my first semester at LFCC who made us write a letter to ourselves. We had to say what we wanted to be doing, where we wanted to be, and things we wanted to remind ourselves of. It took me a little longer to accomplish those goals.....Now, I have accomplished most of the things I wrote to myself. One of them was to transfer to JMU to complete my Bachelor’s. Even after being accepted, I didn’t know how I was going to manage it.....Then, I learned about this scholarship, which has certainly been life changing. I’m slowly realizing how far I’ve come and how close I am to the end of a long journey. Yet, it is the beginning of a new chapter. So thank you.”

M.P. - Late Ace Scholarship recipient

- Funded 99 K-12 students through VDOE Education Improvement Scholarship Tax Credit Program (EISTCP), totaling \$432,257.12
- Awarded \$156,980 in scholarships to 52 high school and college students through 21 scholarship and award funds
- Created the [Brighter Future Mentoring Award](#), with the vision and generosity of a local couple, to provide college and career counseling for high school juniors

Congratulations to Alma Cruz-Santiago, a current Blue Ridge Community College student and the Harold & Faye Teer Scholarship recipient. Alma was recently accepted to James Madison University! She will transfer to JMU in the fall to continue her studies.

Alma is a first generation college student and served as a speaker for incoming freshman Bowman Scholars at the BRCC Welcome Day in August. She provided great advice and encouragement to new students.

Way to go Alma!



# Our Financials

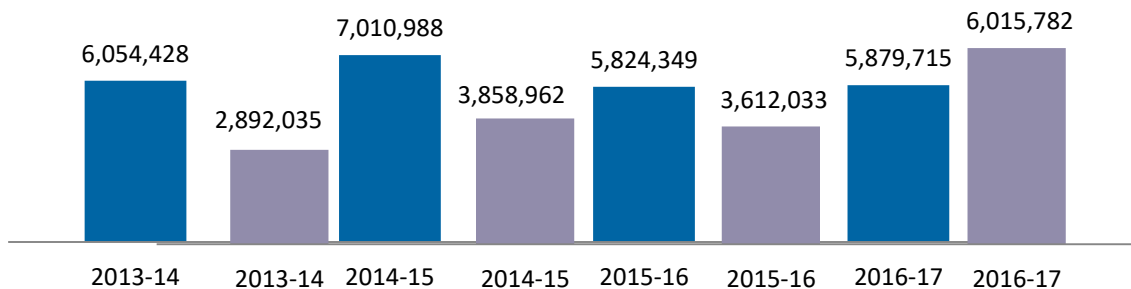
## June 30, 2017 Audited Financial Statement Summary

Financial Position	2016-17	2015-16
<b>Total Assets</b>	<b>34,284,085</b>	<b>31,936,373</b>
Agency fund obligations	8,046,395	8,339,137
Remainder trust liabilities	280,202	263,214
Other liabilities	30,648	21,860
<b>Total Liabilities</b>	<b>8,357,245</b>	<b>8,624,211</b>
<b>Net Assets</b>	<b>25,926,840</b>	<b>23,312,162</b>

Statement of Activities	2016-17	2015-16
<b>Revenues</b>		
Contributions & Other Support	5,996,877	5,938,045
Investment Gains	2,817,143	372,215
Less Agency Fund Activity	(1,658,944)	(623,608)
<b>Total Revenues</b>	<b>7,155,076</b>	<b>5,686,652</b>
<b>Expenses</b>		
Grants	6,015,783	3,612,033
Less Agency Fund Distributions	(1,879,968)	(910,005)
Other Program Services	169,007	134,742
General & Administrative	194,707	188,321
Fundraising	43,417	44,490
<b>Total Expenses</b>	<b>4,542,946</b>	<b>3,069,581</b>
Non-controlling interest - Eastham, LLC	2,548	
<b>Change in Net Assets</b>	<b>2,612,130</b>	<b>2,617,071</b>

### Gifts by Fiscal Year

### Grants by Fiscal Year

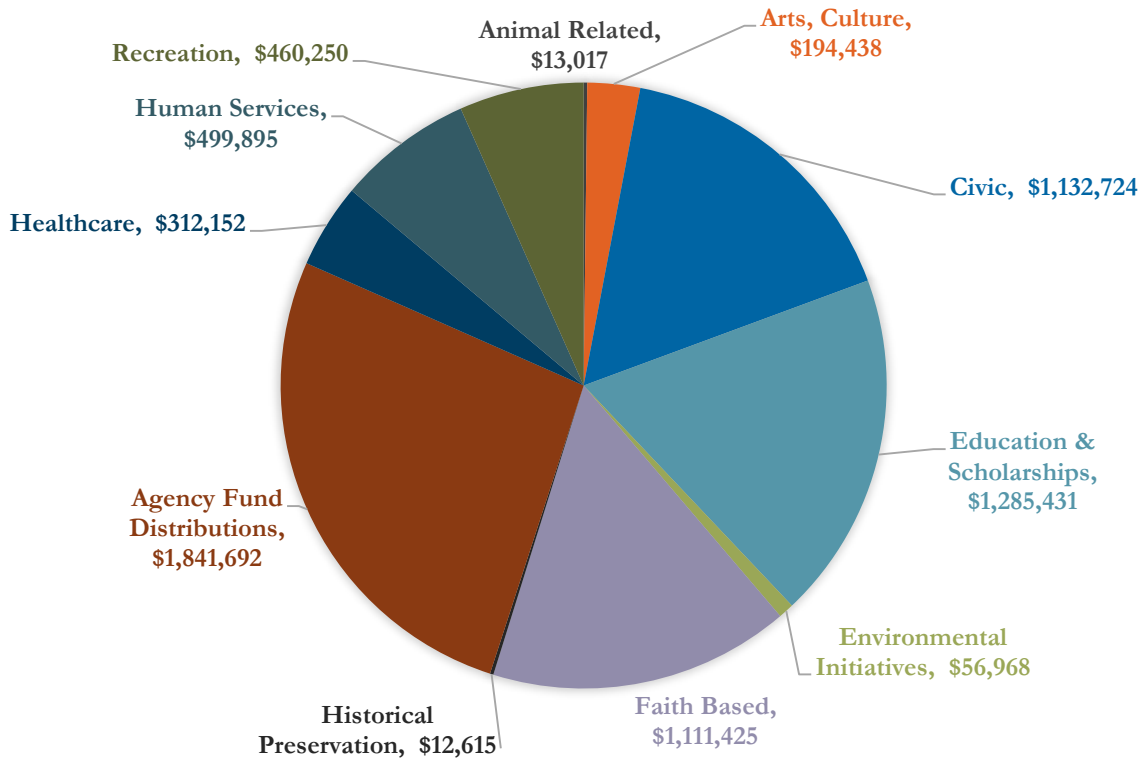




**\$31,519,950** Our Grants Since Inception

As of December 31, 2017

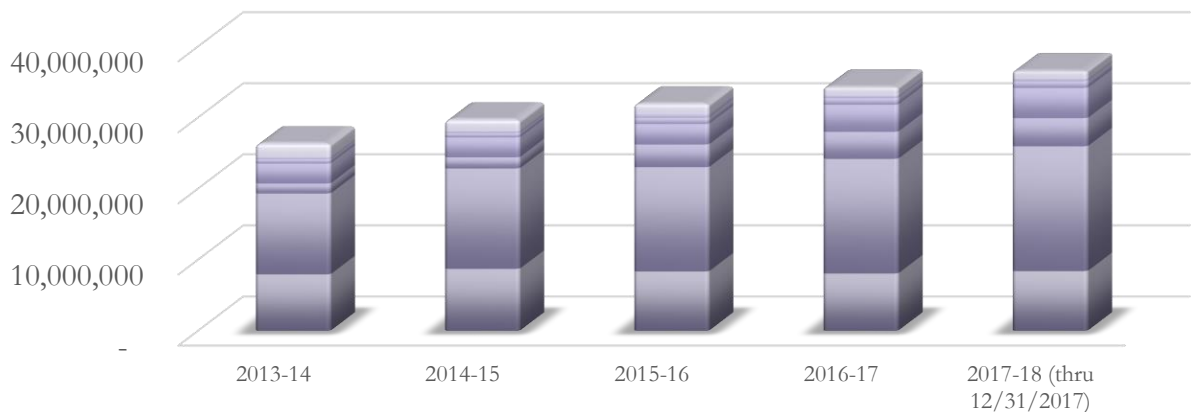
### 2016-17 GRANTS BY PROGRAM AREA



**\$36,561,709** Our Gross Assets

As of December 31, 2017

### Gross Assets over Time



# Thank you

We are grateful to our fund holders and the charitable individuals and businesses that support the work we do. Through their generosity, we are able to provide assistance to the nonprofit community in Harrisonburg, Rockingham County and beyond. We value your partnership and your ongoing support of our mission!

*We appreciate the invaluable leadership provided by our Board of Directors!*



**2017-18 Board** (L to R): Revlan Hill, Executive Director, Cynthia Prieto, Jason Fink, Dale Hulvey (Vice Chair), Laura Toni-Holsinger, Joe Paxton (Chair), Scott Rogers, Toni Bentel Bailey, Brian Shull, Stephanie Byrd (Past Chair), Lindsay Brubaker, Jeff Adams, Donna Harper (Secretary), Kevin Flint, Billy Robinson (Treasurer)

**Not pictured:**

Kay Harrison, Diar Kaussler, Daphyne Saunders Thomas



HARRISONBURG-ROCKINGHAM

**540-432-3863**

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

**Location**

317 S. Main Street, Harrisonburg

**Mailing Address**

P. O. Box 1068, Harrisonburg, VA 22803



## 2017 Professional Partners in Philanthropy

*Providing financial & professional support*

**BB&T**

Ronald D. Blake

Chris Ellis

Kevin Flint

Katherine L. Preston

**Clark & Bradshaw**

Ellen Brodersen

**Graves-Light Wealth Management of  
Wells Fargo Advisors**

A. Wesley Graves, VI,

Managing Director, Investments

Asa W. Graves, VII,

Managing Director, Investments

J. Douglas Light,

First Vice President, Investments

**Holsinger Sipe Investment Group of  
Wells Fargo Advisors**

Ed Sipe,

First Vice President – Investments

**Lenhart Pettit PC**

Jennifer Shirkey

**The Myrias Group of Ameriprise  
Financial**

Andy Huggins

**Printing Express**

Mike Meredith

**PB Mares**

Kevin Humphries

**Stern & Heatwole Financial Group, PC**

Norman Stern

Christine Worontzoff

Franklin Showalter

W. Michael Heatwole, III

**Stratigent Financial, LLC**

Dale S. Lam

Abe J. Shearer





WEDNESDAY, APRIL 18th, 2018

The Great Community Give is a powerful online giving event designed to inspire and grow charitable giving in our community.

- A single day of giving to nonprofits from sunrise to sunset/6:30am to 8pm on Wed., April 18th
- Using an online donation platform at [www.greatcommunitygive.org](http://www.greatcommunitygive.org)
- Building community and connecting donors with local nonprofits
- Empowering our community to support their favorite causes

*An initiative of, and expenses underwritten by, The Community Foundation of Harrisonburg & Rockingham County, The Great Community Give empowers all ages to easily support their favorite local charitable organizations*



## What are the goals of the Great Community Give?

- Engage 3000 donors from Harrisonburg & Rockingham County
- Generate \$70,000 in donations from the public
- Give Away \$50,000+ in prize money from the sponsors.

**Special thanks to our Platinum Sponsors: Estland Design and F&M Bank**

---

# Platinum Sponsors

---



**F&M Bank**

**ESTLAND**

**redefine yourself.**

# #GREATCOMMUNITYGIVE

An initiative of The Community Foundation



## Gold

---



### nTelos Wireless Foundation

A donor advised fund of the Community Foundation of the Central Blue Ridge

---

## Silver

Blue Ridge Insurance Services, Inc.

Charles & Mary Henderson

Classic Kitchen & Bath

Graves-Light Wealth Management of Wells Fargo Advisors, LLC

Janney Montgomery Scott LLC

LD&B Insurance and Financial Services

PBMares Harrisonburg Partners

Valley Engineering, PLC

## Bronze

---

Barbara & Karl Stolfus

Comsonics, Inc.

Denton Family Charitable Foundation

Dick Myers Chrysler-Dodge-Jeep-Ram, Inc.

Dynamic Aviation Group, Inc.

E&M Auto Paint & Supply Corporation

Eddie Edwards Signs Inc.

George & Ann Pace

Larson Wealth Management

Lenhart Pettit PC

Myers Ford Co., Inc.

Sherry & Paul Cline

Pendleton Community Bank, Inc.

Riner Rentals

The Myrias Group – Ameriprise Financial Services, Inc.

Tropical Smoothie Café

Union Bank & Trust Wealth Management

## Friends

---

Clark & Bradshaw PC

Farm Credit of the Virginias

Frazier Quarry Inc.

Glass & Metals Inc.

ITdecisions, LLC

Lantz Construction Company

MillerCoors LLC

Rockingham Insurance

Stern & Heatwole Financial Group

Stone Law Group, PLC

Summit Community Bank

Weaver's Flooring America