

# Community Foundation Impact Report 2022

Together we do more good

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

It is very humbling and gratifying to see so many individuals make the decision to become part of our CFRBA family of funds. It took our foundation ten years to reach over \$7M in assets. This has allowed us to grant \$3.4M from more than 80 funds to community programs, projects and efforts over the last decade. This was a remarkable year of transformation and growth for the Community Foundation. We led the effort in Community Projects to increase our grant-making and address needs intensified by the COVID-19 pandemic. We supported black-owned entrepreneurship. We worked with our donors in so many ways to increase their philanthropic impact.

Our Community Foundation was created out of a few funds and the forward-thinking generosity of individuals who wanted to make our community better. Over the last decade, we have grown from \$864,000 to total assets to over \$7 million. This didn't happen by chance or luck. The strength of our organization and the community itself lies in generations of generosity. This year alone, we accomplished big things with the help of our community. We received \$1.2 million in gifts from generous individuals, organizations, and families. We awarded \$280,000 in grants to deserving nonprofit organizations and awarded over \$100,000 to support new black entrepreneurship in our service area. We helped individuals pursue their dreams by awarding over \$25,000 in scholarships.

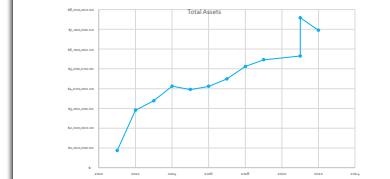
We recognize that we are part of something bigger than ourselves. The work we do together is built on deep history and dedicated to a brighter future. CFRBA will continue to encourage donors to think outside the box, finding new ways to fulfill their passion and impact lives. Together, we will create great stories that will be their lasting legacy.

- Lori Turner, Executive Director

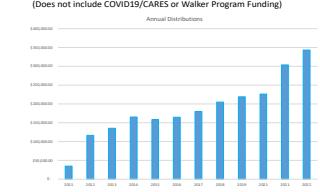
*"At RAH, we know that every year we can count on a certain amount of money from our endowments at CFRBA. That makes a big difference in our ability to meet our mission of making sure that people who are dealing with serious illness are able to live their lives as fully as possible for as long as possible, and are treated with the dignity and care that every human being deserves,"*

*Tasha Walsh- Executive Director*

## Total Assets 2011-2022



## Distributions 2011-2022



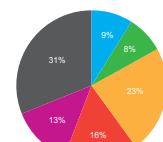
## Total Distributions 2011-2022

**\$3,423,471**



## Areas Served

Basic Needs      Cultural/Recreational      Churches      Educational      Community Organizations



## CFRBA Facts:

- Holds \$7M in endowed assets
- Over 80 endowed funds
- Entrusted with over 30 agency endowments
- \$3.8M in grant distributions
- Received \$3.2M in estate gifts
- Over 20 individuals/families in Legacy Society
- Over \$3M in investment growth
- Supported over 100 not for profit Agencies
- Over \$660,000 in COVID19 pandemic relief
- Over \$200,000 supporting Black business
- Leader in community projects

## Community Foundation Partners to Support Important and Impactful Projects

The Community Foundation (CFRBA) does so much more than just support not for profits with operational costs. They also are proud community partners in special projects for the betterment of many. Some of those stories are highlighted below as part of our year end impact report.

### Providing Essential Support During Medical Situations



When 11 year old Samuel was diagnosed with cancer in 2015, a benefit supper, dubbed "Samuel's Supper," was hosted by the local church, elementary school, and surrounding community. Free will offerings from the event were given to Samuel's family (The Golladays) to help with medical expenses during Samuel's treatments.

Support for the Golladays came from all over the country by way of prayers, events, and monetary donations. But the idea of hosting a "Samuel's Supper" again in the future to benefit others became the means by which the Golladay family could return kindness to the communities that had graciously given to them. From 2015-2018, a "Samuel's Supper" meal was held annually at the Fairfield United Methodist Church with donations designated to support local families who had a child needing critical medical care. In the spring of 2018, directorship of Samuel's Supper was passed to the Golladays, who then transformed Samuel's Supper into a 501(c)(3) nonprofit organization capable of serving the community on a larger scale.

While most of us wake up each morning and go about our normal daily routine, there are many families who will start their day in a hospital room watching over their critically ill child. These families are not only worrying about the health of their child, they're also worrying about missed work, increased travel expenses, and paying for medical treatments that insurance plans do not cover. When parents must forego work to become caregivers, even covering basic needs such as groceries and mortgage payments can be overwhelming.

When these unexpected moments happens, families can find comfort knowing that someone is working behind the scenes for them while they struggle to make adjustments to a new "normal". The expenses incurred during a medical crisis can become overwhelming in a very short period of time. Samuel's Supper helps families worry less about expenses and spend more time focusing on their child.

The Community Foundation is a proud supporter of Samuel's Supper through our unrestricted and donor advised grants program. To date, Samuel's Supper has gifted over \$130,000 in aid to 46 families with children undergoing critical medical care. "Ongoing support from the Community Foundation for Rockbridge, Bath, and Alleghany assists Samuels Supper in providing short-term financial support to families with children in medical crisis. Our organization works to apply funding toward expenses causing each family's most immediate hardship. Grants from CFRBA allow Samuel's Supper the flexibility to provide funds in creative ways that generate a swift and positive impact for those caring for a critically ill child," says Sherri Golladay, Program Director.

*"The Community Foundation provides an avenue for making a lasting impact in our community. They help donors establish funds for charitable giving and their generosity makes such a difference to the not for profits who receive funding"*

Ingrid Barber, Alleghany Highlands Community Services

### Supporting Children & Families through Care Portal



CarePortal is a system that exists to help children and families with their most critical need. In 2021, five Rockbridge area churches enrolled in the program through Patrick Henry Family Services. CarePortal is a technology connecting platform that brings the needs of hurting children and families in your community to the attention of those who can offer assistance. Caseworkers uncover the needs which allows the system to make local churches and community members aware, giving them a real-time opportunity to respond.

Some examples include:

- A grandfather who is taking custody of his grandchildren. He lives in a small house and his two grandsons will have to share a room. They are in need of a bunk bed and groceries until he can find a job to support all of them.
- A mother who is in active recovery and needs transportation to places that will help her to gain her driver's license, housing, and a stable job to help in the reunification process with her children.
- A crib and car seat for foster family with three children of their own, who agreed to take in a six month old with medical needs.

Supporters in Rockbridge County are putting their hands and feet in the plow, providing love to meet people right where they are and transforming lives, one request at a time.

"We are so excited to receive the support of the Community Foundation for Rockbridge, Bath, and Alleghany. CarePortal will work to expand the number of agencies submitting requests and the number of churches responding in these areas," said Rhonda Sedovy, spokesperson for CarePortal.

The system will assist in strengthening families, assisting those in foster care and encouraging caseworkers. The Community Foundation funding will help local churches be missionaries in their own backyards; providing a circle of care around vulnerable children.

*"For the people we serve, the overall impact of CFRBA grants has been to improve their emotional health as their physical well-being. Socializing with friends, receiving from the never-ending responsibilities of caregiving, contribute to improving peace of mind and increased feelings of control and independence. We are thankful for that support."*

Jeri Schaff, Valley Program for Aging Services

### Providing for Black Owned Entrepreneurship



An automobile repair shop, a photography studio offering classes and events, and an all-natural hair-care product manufacturer are among the seven new start-up businesses awarded grants through The Harry Lee and Eliza Walker Entrepreneurship Program. The Community Foundation serves as the fiscal agent for this successful initiative.

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

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

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

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

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

### Helping Students with Financial Burdens

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

"High school is a stressful and fun experience with many things to do, friends to make, and activities which can be expensive. Many students have limited financial resources. the feeling of being left out, the un-easiness and embarrassment as friends discuss the upcoming field trip or activity," said



*"When the Virginia Department of Transportation inspectors arrived at our build site, we learned that the driveways on our next two homes all exceed 10% grade. In order to satisfy state regulations, they will require solid surfaces, rather than our customary gravel. With CFRBA funding, we will not be forced to pass this extra cost along to our partner homeowners, who are already committed to our funding such as this that Rockbridge Area Habitat is able to fulfill our mission to bring people together to build homes, communities and hope."*

*Lynne Johnson, Rockbridge Area Habitat for Humanity*

MacLeod." The STUFund provides a way these kids can fully participate in the excitement and challenges of high school. The fund is an invisible hand that can reach out and help pay for some of these high school expenses."

In 2002, we were able to provide funding for several key initiatives including financial assistance for middle school Chesapeake Bay trip, support to feed sports teams at away games, purchase of musical instruments, purchase of safety shoes for trade classes, and supporting youth who could not afford uniforms to participate on travel team. The STUFund was a beneficiary of the Balloons over Rockbridge grant this year which will have meaning impact on the amount of funding which will be distributed.

# Community Foundation Provides Funding for Second Chances

The United States has some of the highest recidivism rates in the world. According to the National Institute of Justice, almost 44% of criminals released return before the first year out of prison. In 2005, about 68% of 405,000 released prisoners were arrested for a new crime within three years, and 77% were arrested within five years. (World Population Review 2022)

The 2016 Brookings Institute landmark study reads, “Once at-risk inmates are identified, research indicates that prioritizing these individuals for programming can positively impact rehabilitation, reduce recidivism, and improve public safety.”

The S.T.E.P.S. program does just that. In 2021-22, the program's inaugural year, Richard Jones has journeyed from “convicted felon” to “returning citizen.” After 34 years of incarceration, Mr. Jones has faced the daunting reality of not only returning to a world that has moved on without him, but also reinventing himself into a man of character and model citizenship.



The S.T.E.P.S. committee has rallied an impressive band of community partners in Lexington and Rockbridge to support Mr. Jones during his first year in our community. RARA provided groceries and one month of rent, the Community Closet provided clothing, and critically, a local landlord recognized the potential to serve and saw past the nearly universal refusal to rent housing to a convicted felon. Mr. Jones was provided with a job opportunity, which he has repaid by becoming a model employee, and according to his agreement, is contributing significantly to his living expenses. He has taken advantage of every opportunity to better himself, from attending support groups to becoming an active member of a church community. And always by his side have been his S.T.E.P.S. peer mentors to befriend, guide, and support him.

“This success has led the committee to double the program for 2022-23, inviting two returning citizens into our community and our caring circle. We are grateful for the support of our partner organizations, Grace Episcopal Church and The Community Foundation for Rockbridge, Bath, and Alleghany, who have provided the financial resources necessary for this program and for these two gentlemen to thrive,” says Cathy Plageman, spokesperson for S.T.E.P.S.

*“Rockbridge Christmas Baskets relies completely on the generosity of others. The money received from grants goes directly to purchasing healthy food and gifts for qualified children and families in Lexington, Buena Vista and Rockbridge County.”*

*Paige Williams- Donor Relations Chair*

*“Our agency endowment at the Community Foundation provides a guaranteed annual income in perpetuity. It is comforting to know that we can always depend on the Community Foundation grant process to fill a needed gap within our budget.”*

*Chris Doyle-Boy, Boys Home of Virginia*

We greatly appreciate the generous contributions of our donors, many of whom have created highly personalized charitable funds at the Community Foundation or plan to do so later

We welcome the opportunity to learn about your charitable intentions and to explore how we can help you fulfill them.

## LIFETIME GIFTS:

A gift made during donor's lifetime can offer attractive tax advantages.

## CHARITABLE BEQUESTS:

A charitable bequest through a donor's will can include a gift of specific property, a specific dollar amount or a percentage of the estate.

## QUALIFIED CHARITABLE DISTRIBUTIONS (IRA):

Donors Age 70 1/2 and older may direct a gift to the Community Foundation which counts toward their required minimum distribution.

## LIFE INSURANCE, RETIREMENT PLANS, AND TRUSTS:

Make a gift by designating the Community Foundation as a beneficiary of life insurance policies, retirement plans, IRAs, and trusts.



Excellence. Accountability. Impact.™



For additional information on the Community Foundation for Rockbridge, Bath and Alleghany please contact Lori Turner at:

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