

*Thanks for Giving*

# The Greater Lynchburg Community Trust

*2014 Annual Report*



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

## Mobilizing Philanthropy to Meet Community Needs



*The mission of The Community Trust is to enhance the quality of life in the communities served by establishment of permanent endowments for the city of Lynchburg and the counties of Amherst, Appomattox, Bedford and Campbell, with income distributed annually to charitable organizations within the community.*

# The *Greater Lynchburg Community Trust*

The Greater Lynchburg Community Trust provides for the administration and the investment of gifts and bequests for the benefit of the city of Lynchburg and the counties of Amherst, Appomattox, Bedford, and Campbell. Needs served are broad in scope including human services to children, youth, the needy, and the elderly; education; health; the arts; and the humanities.

The Greater Lynchburg Community Trust exists to promote local philanthropy and to simplify the process of giving. The Trust receives and manages permanent gifts for the perpetual benefit of the Greater Lynchburg area.

## President's *Message*

The Greater Lynchburg Community Trust's fiscal year ending June 30, 2014 was a year of healthy growth. Total assets grew 15.2% to \$36.8 million by year end. During the year, the Board of Directors initiated a Strategic Planning Process to identify key areas of focus for the next three to five years. As a result of this process, The Community Trust developed several valuable improved processes in the areas of development, distribution, and investment. The Board of Directors also adopted a new Vision Statement – "Mobilizing Philanthropy to Meet Community Needs."

Since its founding in 1972, generous donors have given \$33.2 million to The Greater Lynchburg Community Trust. This has enabled us to help those in need and to support the arts, education, and historical preservation in our area for over 42 years. Since our current spending policy of 5% is based on the twelve quarter average market value, we are able to make our annual distributions to the community in a stable and consistent manner regardless of the current economic conditions at any particular point in time. We are able to grant funds when the economy may experience a downturn when funds are drastically needed. In other words, The Community Trust provides a relatively steady and dependable funding source from year to year. During the fiscal year ending June 30, 2014 our Distribution Committee awarded grants totaling \$1,521,165, compared to \$1,363,719 the prior year.

However, we need your help! In order for us to continue this trend and increase our support of much-needed programs in our community, we must continue to have generous gifts like we have had in the past. A gift to The Greater Lynchburg Community Trust is a powerful gift because we are an endowment fund, and your gift will support our community in perpetuity, that is, forever. It is the best investment you can make in your community.

The Greater Lynchburg Community Trust currently consists of 228 Special and Unrestricted Funds. Trust assets are managed by: SunTrust, BB&T, Bank of America, Wells Fargo, Flippin Bruce & Porter, Wells Fargo Advisors, First Citizens, Davidson & Garrard and Pettyjohn, Wood & White.

The Greater Lynchburg Community Trust is one of more than 750 such community foundations over the nation rendering a valuable service to their respective communities and to donors interested in the present and future of their communities and their neighbors.

During the June 30, 2014 fiscal year we received contributions of \$1,062,811. Donors to The Greater Lynchburg Community Trust have the satisfaction that their gifts will continue to benefit future generations. And these donors, their families, and their causes will be remembered forever through named funds. The establishment of a named fund is a wonderful way to advance one's philanthropic interests and to leave a legacy.

The Greater Lynchburg Community Trust ended the year with a healthy increase in market value for the year. We ended the June 30, 2014 fiscal year with assets totaling \$36,861,624, up 15.2% from \$32,009,302 at June 30, 2013.

We are fortunate to live in a community that is so supportive. Our citizens understand the "higher calling" to help those in need. The Greater Lynchburg Community Trust has been a conduit for this generous giving in our community for years, and we will be a major player in that role for many years to come. A community endowment fund is a powerful investment in the future. It lasts forever.

The success of The Greater Lynchburg Community Trust is the result of a team effort. Thank you to all the donors, volunteer boardmembers, advisors, trustee banks, investment advisors, and staff members for all you have done for The Community Trust. We look forward to serving the community for years to come.



Stuart C. Fauber  
*President & CEO*

## Board of Directors:



John R.  
Alford Jr.



Robert L.  
Finch Jr.



John M.  
Flippin



Ernie T.  
Guill



David A.  
Herrick



Hylan T.  
Hubbard III



Ellen P.  
Jamerson



Wallace G.  
McKenna Jr.



Ellen G.  
Nygaard



Augustus A.  
Petticolas Jr.



James R.  
Richards



Marc A.  
Schewel



Massie G.  
Ware Jr.



James W.  
Wright



Charles B.  
White

## Advisors to the Board:



Elliot S.  
Schewel



Stuart J.  
Turille



Kenneth S.  
White

## Board Chair:



MaryJane Dolan, *Board Chair*

## Foundation Staff:



Cheryl C. Hall, *Office Manager*  
Stuart C. Fauber, *President & CEO*  
Kendra H. Floyd, *Accountant*

## Our Office in Wyndhurst:



The GLCT office is located at  
101 Paulette Circle in Wyndhurst.

# *Celebrating 40 Years* of Service to Our Communities

## Accomplishments Since Our Formation in 1972

- Donors have contributed \$33,198,619 to enhance the quality of life in our communities.
- The Community Trust has provided grants totaling \$15,881,509 to help those in need and to support the arts, education, and historical preservation.
- The Community Trust has provided materials and programs to teach our citizens the importance of philanthropy and the value of giving back to the communities in which we live.
- The city of Lynchburg and the counties of Amherst, Appomattox, Bedford, and Campbell are a “better place to live” as a result of The Greater Lynchburg Community Trust.

## Highlights of Our 40 Year History

**1972** The Community Trust is established with Fidelity American Bank, United Virginia Bank, and First & Merchants as Trustees.



**1988**

William F. Quillian Jr. becomes The Community Trust's first Executive Director. Trust assets are \$300,000.

*Bill Quillian was instrumental in the early growth of The Trust.*

**1990** The Community Trust's Board of Directors is formed with George T. Stewart as Chair and G. Edward Calvert as Vice Chair.

*George Stewart provided early leadership.*



**1997**

The Community Trust gains increased visibility in Central Virginia. Trust assets exceed \$5 million.

*Marie Harris and Jane White celebrate The Trust's impressive growth.*

**2002** The Community Trust celebrates its 30th Anniversary. Trust assets exceed \$15 million.

*Jiggie Holt and Eleanor McNamara at The Trust's 30th Anniversary Celebration.*



**2014**

The Community Trust's Board of Directors develops five year strategic plan. Trust assets exceed \$36 million.

*Marc Schewel and Jim Wright map strategy.*





# Leadership at *The Greater Lynchburg Community Trust*

## Board Chairs Since Formation of Board in 1990



George T. Stewart  
1990-1996



James K. Candler  
1997-1998



Samuel P. Cardwell  
1999-2004



Terry H. Jamerson  
2005-2007



Yuille Holt III  
2008-2009



William E. Gayle Jr  
2010-2011



MaryJane Dolan  
2012-present

## Executive Directors and Presidents Over the Years



William F.  
Quillian Jr.  
1988-1997



Stuart J. Turille  
1998-2000



Kenneth S. White  
2001-2003



George H. Murphy  
2004-2007



Stuart C. Fauber  
2008-Present

## Past Directors

Mr. G. Everett Bond .....	1980-1991	Mr. Robert H. Gilliam .....	1998-2005	Dr. William E. Painter.....	1993-1999
Mr. V.D. Bradley.....	1973-1980	The Rev. D. Jack Hamilton .....	1997-2000	Mr. Stephen D. Pruitt .....	1995-1998
Mr. Philip P. Burks .....	1973-1979	Mr. James R. Harris Jr. ....	1989-1993	Ms. Amy G. Ray .....	2000-2009
Mr. Carl W. Calandra.....	1989-1999	Mr. Yuille Holt, III.....	1989-1996	Dr. Larry H. Redmond .....	1989-1997
Dr. G. Edward Calvert .....	1981-1993	..... &	1998-2009	Mr. John F. Richards .....	2005-2009
..... &	1999-2001	Dr. Read Hopkins .....	1980-1981	Rev. Haywood Robinson Jr. ....	1973-1982
Mr. W. Starke Camden.....	2001-2010	Ms. Joyce Houck.....	1998-2007	Mr. Leonard L. Rudacille .....	1980-1985
Mr. James K. Candler.....	1989-1998	Ms. Allethia J. Ingram .....	1992-1997	Mr. W. E. Sandidge .....	1989-1995
Mr. Samuel P. Cardwell.....	1996-2006	Ms. Terry H. Jamerson .....	1997-2007	Ms. Irma Seiferth .....	1997-2007
Ms. Sandra S. Carrington.....	1973-1984	Ms. Joan S. Jones.....	1985-1989	Mr. Bryan K. Selz.....	1986-1995
Ms. Sandra B. Chandler .....	1995-1997	Mr. Joseph C. Knakal Jr. ....	1999-2008	Mr. Benny R. Shrader .....	1995-2005
Mr. A.C. Coleman .....	1990-1991	Mr. John E. Lane III.....	1980-1985	Dr. Carl Stern.....	1973-1979
Mr. A.C. (Cliff) Coleman III ...	2009-2010	Ms. Arelia S. Langhorne.....	1983-1992	Mr. George T. Stewart .....	1989-1996
Ms. Mary Spencer Craddock...	1989-1999	Ms. Patricia W. Leggett .....	1989-1997	Dr. James Sublett.....	2002-2003
Mr. Theodore J. Craddock.....	1984-1993	Dr. Carroll H. Lippard.....	1973-1979	Mr. Daniel B. Sweeney.....	1999-2004
Mr. John P. Eckert.....	1996-2006	Mr. Robert S. Lockridge.....	1973-1979	Mr. Peter E. Viemeister .....	1989-1995
Mr. Carroll Freeman.....	1980-1983	Dr. R. John Matthew .....	1973-1979	Mr. John A. Watts Jr.....	1999-2008
..... &	1993-1998	Mr. William N. Mays .....	1989-1998	Mr. T. Ashby Watts, III .....	1998-2006
Dr. William E. Gayle Jr.....	2003-2012	Ms. Annis T. McCabe .....	1980-1990	Mr. Kenneth S. White.....	1973-1979
Ms. Alice Gifford .....	1981-1991	Mr. Adrian Mood.....	1993-1998		

# *The Community Trust's* Strategic Planning Process

During our 2013-2014 fiscal year, the 16-member Board of Directors of The Greater Lynchburg Community Trust initiated a Strategic Planning Process to identify key areas of focus for the next three to five years. On September 10, 2013 the board and staff held an interactive Strategic Planning Session at the Craddock Terry Hotel. Participants took into consideration the experiences of the past, the current state of the organization, potential risks, and where and how the organization desires to grow. Participants identified strengths to be leveraged and weaknesses to be bolstered. Looking ahead toward the future, opportunities for growth and preparedness for possible threats were identified. In addition to improved organization processes, three areas of focus were identified that resulted into three task forces (Development, Distribution, and Investment). The task forces reported their findings to the full board during the year. At the final board meeting of the fiscal year on June 10, 2014, the Board of Directors approved the organization's Vision Statement.

## **“Mobilizing Philanthropy To Meet Community Needs”**



Marc Schewel



Hank Hubbard



Jim Wright and Massie Ware



Charlie White and David Herrick

# *Quick Facts* about The Community Trust

**Founded**  
1972

**Total Assets**  
\$36.8 Million

**Total Funds**  
228

**Grants To The Community In 2014**  
\$1.5 Million

**Charitable Organizations Supported**  
140

**Gifts From Donors In 2014**  
\$1.1 Million

**Operating Expenses As % Of Investments**  
0.88%





# A Sampling of Our *Funds*

The Greater Lynchburg Community Trust administers 228 individually named funds. These funds are established to support our community grantmaking, support organizations recommended by the donor, or provide ongoing support for one or more specified charitable organizations. Individual funds range from \$10,000 to over \$5 million, and they serve a wide range of community needs.



After school homework session.

## **The Boys & Girls Club of Greater Lynchburg Fund - \$52,775**

The Boys & Girls Club of Greater Lynchburg established their endowment fund at The Greater Lynchburg Community Trust in 2009 with a lead gift from Lynn and Jim Daly who are strong supporters of the Boys & Girls Club and youth development programs. Following their lead, the board voted to commit to the long-term growth of the endowment fund to help ensure the long-term viability of the Boys & Girls Club. With this option, patrons and supporters can choose to help the club continue its mission to provide a safe, secure and positive place for the youth of Lynchburg to grow and realize their full potential for years into the future. The club offers young people what they need and want most: adults who respect and listen to them; a safe environment where they can have fun; and interesting, constructive activities that channel youthful energy into challenging pursuits. An initial \$5,000 gift has grown to almost \$50,000 to help ensure the long-term viability of the Boys & Girls Club of Greater Lynchburg. The establishment of an endowment fund provides annual income for an organization and is a strong indication of financial stability.



Margaret and Bill Quillian

## **The Quillian-Weigle Fund - \$113,774**

In 1994, Bill and Margaret Quillian established The Quillian-Weigle Fund named for their parents. Bill's father was a Methodist minister who was President of Wesleyan College in Macon, Georgia. Margaret's father was the Dean of the Yale Divinity School. Both Bill, a graduate of Emory University with B.D. and Ph.D. degrees from Yale, and Margaret, a graduate of Vassar, came from backgrounds where education and community service were very important. The Quillians made an initial gift of \$5,000 to establish the fund, and they made gifts occasionally on birthdays, holidays, and at special events. Bill and Margaret's wish was that the fund would grow to a size that would make a difference in our community. Bill would often speak to community groups, and he always stated that "my fund has grown over time, and if you establish your own fund, it will also grow over time. You can also make a difference in our community." Bill was The Community Trust's greatest ambassador. His fund has since grown to \$113,774, and will continue to grow over time. The Quillian-Weigle Fund supports services and programs that enhance the quality of life of all citizens in Central Virginia in perpetuity.





George Murphy

### **The George H. Murphy Fund - \$15,443**

George Murphy served as President & CEO of The Greater Lynchburg Community Trust from 2004-2007. The George H. Murphy Fund was established after his death in 2008 by his friends and family. The fund is an unrestricted fund, but primarily supports agencies and programs in the Bedford area. George and his wife Barbara made Bedford their home in 2000 after living in Alabama, Boston, Dallas, Atlanta, Chicago, Montreal, and New York. George had a long career in the newsprint business which started in 1963 with International Paper Company and retired as Vice President with Avenor America, Inc. when the Murphys moved to Bedford in 2000. Barbara ran a successful catering business along the way in their various communities. George and Barbara became enthusiastic citizens of their adopted community in Bedford. Thus, the fund supports worthwhile projects and programs, primarily in the Bedford area. And the Murphys leave a legacy that will last forever.



Dunbar High School students in 1947.

### **The Dunbar High School Legacy Fund - \$125,984**

The Dunbar High School Legacy Fund, a scholarship fund, was established to award one-time scholarships to Lynchburg public high school seniors who exemplify the kind of high standards of excellence and sense of civic responsibility that helped create the rich legacy of the former Paul Laurence Dunbar High School (1923-1970). To be considered for a scholarship, the candidate must meet certain requirements. He or she must be a well-rounded Lynchburg public high school senior who has a firm commitment from one or more four-year universities or colleges. He or she must have demonstrated consistent high level academic achievement as evidenced by objective measurements such as GPA, Honor Roll, and other awards and recognitions. Financial need is also considered. The candidate must also write a short essay about some aspect of the former Dunbar High School's history. It is suggested that the candidate focus on an alumni, teacher, coach, principal, or event. Thirteen scholarships have been awarded from The Dunbar High School Legacy Fund since it was established in 2005. These outstanding students and their contributions to our community serve to keep alive the spirit of Dunbar High School in Lynchburg.

# A Sampling of Our *Grants* in 2014

In 2014, The Greater Lynchburg Community Trust awarded \$1,521,165 to 140 charitable organizations. Our grants support the four major human service areas identified by our needs assessment study – Successful Children and Youth, Strengthening Families and Individuals, Healthy and Independent Living, and People in Crisis Receiving Help. In addition, our grants support the Arts, Education, and Historical Preservation.



Our Distribution Committee hard at work.

## The Grantmaking Process - \$649,832

During its 41-year history, The Community Trust has provided grants totaling \$15.8 million to help those in need and to support the arts, education and historical preservation in Central Virginia. A large portion of those dollars are determined by The Community Trust's Distribution Committee whose current members include Gus Petticolas, Chair; John Alford, Jr., MaryJane Dolan, Rob Finch, Ernie Guill, Hank Hubbard, Jim Richards, Massie Ware, and Jim Wright. The committee reviews over 100 grant applications over the fall cycle (September 15 deadline) and the spring cycle (March 15 deadline). The Distribution Committee approved \$649,832 in grants to community organizations in 2014. As a result of the committee's conscientious work, the grantmaking process is thorough, fair, and effective in meeting needs in our community. The Community Trust regularly conducts needs assessment studies to ensure that community needs are accurately and effectively addressed in the process. Our community owes a debt of gratitude to our all-volunteer Distribution Committee for their hard work.



Specialized bikes bring independence.

## Wheels on the James - \$4,000

Wheels on the James was started in April 2011 by Nancy Wellons with an initial board of seven additional people. Nancy wanted to pass forward one of the many kindnesses shown to her son, Cpt. James Howard, army retired, who sustained a spinal cord injury from a diving accident at age 28 leaving him a quadriplegic. James received a therapeutic cycle in a bike ride sponsored for disabled veterans and others. The mission of Wheels on the James is to provide similar cycles to disabled children, teens, adults, wounded warriors, and schools with special needs students in Lynchburg and the surrounding area. For the recipients, these donated cycles will open doors to independence, mobility, and recreational exercise. The Community Trust's \$4,000 grant, along with gifts from other generous donors, has enabled the organization to provide more than 100 therapeutic cycles in Central Virginia.



Dinner time is special.

### **Miller Home of Lynchburg - \$10,800**

Miller Home has cared for more than 900 girls since opening its doors in 1875. When established by Samuel Miller, the Miller Home was known as the Lynchburg Female Orphan Asylum. At that time the home was located in a four story building on a working farm. The home currently cares for girls ages four through twenty-one. They strive to provide the most traditional family environment possible while meeting the special individual needs of each resident. The residents come to Miller Home for various reasons, from counties, towns, and cities all over Virginia as well as other states. In some cases, it is the resident's behavior that necessitates placement, while in other situations the parent or guardian is unable to care for her. Whatever the reason, each situation is considered separately. A diverse population is served through the program, and variety within the home is what makes the family special. Miller Home does not accept federal, state or local money, and their choice to remain a private home allows them to serve children whose families are without the resources to pay for group home care. A sliding scale is used to determine the amount of family support. The Greater Lynchburg Community Trust has made numerous grants to Miller Home for programs and capital improvements over the years to help young girls who need assistance.



Many items to choose from.

### **Bedford Community Christmas Station - \$8,000**

Bedford Community Christmas Station responds to the needs of the community by ensuring that low-income families are able to provide household members with the necessities of life. Located in the new Ethel Young Childers Building at 510 Blue Ridge Avenue in Bedford, the Christmas Station assists low-income families on a seasonal basis by providing a shopping experience characterized by choice and dignity. Serving families with children is the highest priority. The Christmas Station is set up like a department store, with sections for infants, girls and boys clothing, teen clothing, gifts, toys, household items and food. Each family that is accepted to shop at the Christmas Station also receives a box of food. The Christmas Station is not just a holiday season event but a year-long program to support needs in the community. The year-long food pantry is open two days per week to serve families on an emergency basis. Additionally, Easter food and accessory boxes and back-to-school assistance include school supplies and shoes. The Community Trust's numerous grants to the Bedford Community Christmas Station over the years have provided much needed assistance to low-income families in our area.

# Types of Funds

The Greater Lynchburg Community Trust offers a variety of simple, flexible, and effective options for those who wish to provide financial support to our community through philanthropy.

## Types of Funds:

### Unrestricted Fund

Contributions made with no restrictions provide income for grants made by the Distribution Committee in response to requests from area non-profit organizations.

### Field of Interest Fund

The donor specifies areas of interest (youth, elderly, education, arts, medical, etc.) to be supported by the fund.

### Donor Designated Fund

At the time of establishing a fund the donor may name the organization(s) or institution(s) to be its beneficiaries.

### Donor Advised Fund

The donor may from time to time suggest specific grants to be made from his/her fund.

### Scholarship Fund

Enables donor to establish an endowment to fund annual scholarships.

### Temporary Fund

Funds created when assets are delivered to The Trust with the expectation that they will ultimately be distributed for charitable purposes.

### Operating Endowment

The income from this fund is used to help meet The Trust's operating costs, thereby increasing the amount available for charitable distribution.

# Our Funds

## Unrestricted Funds

Evelyn and Thurman Adams Fund

\$12,088.14

Alford Family Fund

\$10,244.12

Bank of the James Fund

\$23,924.22

Brock and Edith Barkley Fund

\$17,657.12

Rachael B. and William E. Blandford Fund

\$224,643.95

Christopher Sean Brennan Fund

\$11,766.74

Bryant Family Fund

\$4,632.78

Helen & Ed Calvert Fund

\$100,624.19

James Gilliam Conrad Fund

\$24,089.51

Anne Glass Cothran Family Fund

\$22,159.72

Calvin and Virginia Cox Fund

\$590,651.20

Davidson & Garrard, Inc. Fund

\$4,455.30

J. Lyons Davidson Fund

\$10,547.88

David H. Dillard - David E. Basten Fund

\$18,125.53

William L. Driskill, Jr. Fund

\$106,684.85

Evans Family Fund

\$10,442.60



Don and Frances Giles Fund \$7,379.77	Unrestricted Fund \$1,969,578.80	George B. Craddock & Theodore H. Jack Fund \$27,081.36
Thomas F. Harwood Fund \$145,783.67	Valentine Family Fund \$5,378.76	Craddock-Terry Fund \$197,762.74
Carl Hutcherson Fund \$12,668.20	Helen and Sam Williams Fund \$123,431.61	James T. Davis Jr. Mental Retardation Fund \$71,863.43
Martin Johnson Family Fund \$30,930.95	Bob and Phyllis Workman Fund \$14,519.01	Rosalind and L. John Denney Fund \$13,114.26
Merryman Fund \$13,421.39	Anonymous II Fund \$12,314.60	Ron and MaryJane Dolan Fund \$37,857.87
Faye Marcum Mifka Fund \$958,677.74	Anonymous IV Fund \$1,406,512.21	Fauber Family Fund \$21,605.33
George H. Murphy Fund \$15,443.77		Rob and Judy Finch Fund \$12,880.54
News and Advance Fund \$11,027.62	<b>Field of Interest Funds</b>	Greater Lynchburg Environmental Network Fund \$4,095.87
Karen K. and William E. Painter Fund \$15,111.45	Appomattox Fund \$18,419.92	Edwin A. and Margaretta H. Harper Fund \$236,553.51
Ray-Griffin Fund \$7,103.07	W.E. Betts Jr. Family Fund \$40,499.30	Lucy Woodall Harris Fund \$12,628.92
Rice / Stone Fund \$27,036.29	George Everett Bond Fund \$17,971.96	Junius Haskins Fund \$12,787.77
Joyce and Ben Shrader Fund \$14,725.88	B. Douglas and Nancy T. Brockman Fund \$43,672.19	Bill and Mary Jane Hobbs Fund \$12,263.35
Charles F. Stevens Fund \$1,028,674.73	Gaynell and Milton Brooks Fund \$37,680.59	Jiggie and Yuille Holt Jr. Fund \$35,687.91
SunTrust Bank Fund \$18,593.17	Barbara B. and Carl W. Calandra Fund \$34,661.03	Skipper and Sandy Holt Fund \$9,521.91
Thomas/Stemmons Fund \$221,636.38	Catherine Wooldridge Connelly and William Hatcher Connelly Fund \$22,303.07	Mahlon & Gerald Thomas Hutchison Memorial Fund \$32,207.29
Elizabeth and Herbert Thomson Sr. Fund \$128,494.21	Bev Cosby Fund \$38,773.84	
Emmy Lou Thomson Fund \$63,727.32		

## Our Funds *continued*

Bernard & Putnam Kyle Memorial Fund \$441,106.55	<b>Donor Designated Funds</b>	Children's Health Care Endowment Fund \$124,048.41
Mary Emma Lemon Charitable Fund \$117,369.22	Adult Care Center - Elinor Hopkins Fund \$19,007.46	Marion Collins Fund \$118,816.13
Thomas P. and Lewis S. Parsley Fund \$1,334,497.94	Ainslie Family Fund \$11,708.23	Charles and Minnie Lewis Court Street Baptist Church Fund \$140,068.16
Quillian-Weigle Fund \$113,774.33	Alliance for Families and Children of Central Virginia Endowment Fund \$12,081.27	Crittenton Fund \$100,417.17
Jim and Dana Redmond Fund \$5,825.55	Anne Spencer House & Garden Museum Fund \$51,611.09	Daly Legacy Fund \$91,732.72
Sackett-Graves Fund \$4,735,337.41	Anne Spencer House & Garden Museum - Garden Fund \$24,206.73	Dodge Family Fund \$4,470.59
Winnifred and Herman Schenkel Fund \$5,410.25	BB&T Fund \$13,224.58	Linda and Rick Edwards Fund \$6,656.14
George Taylor Stewart Fund \$199,463.02	Bedford House Endowment Fund \$38,549.97	Elizabeth's Early Learning Center Fund \$6,453,416.10
Eleanor and James D. Taylor Fund \$63,062.76	Big Brothers Big Sisters Endowment Fund \$12,471.37	Faith Christian Academy Maintenance Endowment Fund \$136,505.90
Trails Fund \$106,244.32	Bryan-Wade Fund \$116,620.23	Martha Carter Fischer Charitable Fund \$46,329.95
Peter Viemeister Fund \$21,180.33	Boys & Girls Club of Greater Lynchburg Fund \$52,775.81	Free Clinic of Central Virginia Fund \$72,267.11
Diane M. and William M. Walker Fund \$4,775.44	E. F. and Elizabeth B. Burmahln Charitable Fund \$500,847.81	Friends of the Lynchburg Public Library - Mary R. Breazeale Memorial Fund \$28,993.13
G.R. Wiley Fund \$125,940.07	Camp C.H.I.L.D. Fund \$20,045.78	Henriette Jones Gill Fund \$973,255.99
Zippel Family Fund \$11,914.78	Camp Kum-Ba-Yah Endowment Fund \$7,487.72	GLCT Operating Endowment Fund \$57,005.10

Josephine J. Holt Fund \$26,850.96	Lynchburg Economic Development Fund \$68,680.26	Sedalia Center Endowment Fund \$83,323.96
Chris Hudson Trust for Children's Health Care Fund \$7,537.92	Lynchburg Education Foundation Fund \$104,985.97	Step with Links Fund \$116,100.14
Interfaith Outreach Fund \$19,156.32	Lynchburg Symphony Endowment Fund \$76,308.66	Jim Candler Fund for the Pauline E. Maloney Step with Links Program \$74,794.18
Jefferson Choral Society Endowment Fund \$22,754.90	Meals on Wheels Fund \$23,181.00	Grace P. and A. Kendall Sydnor Fund \$25,256.04
Johnson Health Center Endowment Fund \$14,560.88	Miriam's House Fund \$1,953,614.53	United Way of Central Virginia Fund \$327,307.68
Jubilee Family Development Center Fund \$21,552.21	Henrietta & Paul Munro Fund \$207,682.58	Betsy Cox Upshur Fund \$14,688.11
75th Anniversary Junior League of Lynchburg Endowment Fund \$23,546.92	National D-Day Memorial Foundation Fund \$248,871.97	Virginia Center for the Creative Arts Endowment Fund \$12,550.32
Lake Christian Ministries Fund \$13,333.37	Newmark Family Fund \$11,768.36	Virginia Legal Aid Society Endowment Fund \$8,379.70
Larsen Family Fund \$23,924.67	Old City Cemetery Fund \$41,016.41	Virginia School of the Arts Endowment Fund \$116,525.23
Legacy Museum of African-American History Fund \$235,884.84	Opera on the James Endowment Fund \$168,070.89	Virginia Skyline Girl Scout Council Fund \$9,610.28
Edith Brooks Lee Fund for the Lynchburg Public Library \$25,227.62	Walter and Virginia Phillips Fund \$175,709.29	Virginia B. Whitehouse Fund \$9,809.59
Lynchburg City Schools Education Foundation Teacher Grant Fund \$41,160.69	Planned Parenthood of the Blue Ridge, Lynchburg Affiliate Fund \$28,224.56	VLGMA Scholarship Endowment Fund \$10,805.03
Lynchburg Daily Bread Endowment Fund \$11,339.24	Rivermont Evangelical Presbyterian Church Youth Activities Fund \$13,781.94	Women's Leadership Council Endowment Fund \$38,410.51
	Lucy Guggenheimer Ross Fund \$315,253.96	Woman's Resource Center (Endowment) Fund \$109,752.24

## Our Funds *continued*

Woman's Resource Center (ALAM) Fund \$11,700.48	Kay and Helen Carpenter Fund \$47,737.73	Langley Family Fund \$534,147.83
Youth Philanthropy Service Award \$20,693.44	Coleman Family Fund \$136,466.82	Lewis Family Fund \$292,483.77
YWCA of Central Virginia Fund \$12,594.14	Jean and Bill Cook Fund \$61,703.11	Lynchburg Academy of Medicine Fund \$90,901.22
<b>Donor-Advised Funds</b>	George and Gladys Costan Family Scholarship Fund \$47,561.63	Leila C. McBratney Family Fund \$123,456.02
Jim Ackley Theatre Education Fund \$15,370.91	Rosemary and George Dawson Fund \$11,499.75	Sarah P. McBratney Fund \$25,395.63
Eleanor and Jimmy Atkins Fund \$244,270.61	Elro Foundation Fund \$187,120.60	Jim Mitchell Charitable Trust Fund \$17,194.71
Barnard Family Health and Wellness Fund \$58,949.88	Flippin Fund \$18,615.75	Violet Mitchell Charitable Trust Fund for Women and Girls \$23,267.20
Harmon and Mary Beauchamp Fund \$39,403.83	Judy and Bill Gayle Fund \$90,151.23	William N. and Nancy S. Nelson Fund \$821,188.51
Betty Lynn and John Blanks Family Fund \$18,710.20	Greif Brothers Fund (VA Fiber) \$325,512.89	Christine and Augustus Petticolas Fund \$4,854.25
David L. and Carole H. Bowen Fund \$23,191.82	Mary and David Harman Fund \$28,679.70	Christine and Augustus Petticolas Fund \$4,854.25
Vince Bradford Fund \$14,198.17	Coach Bo Henson Fund \$17,426.69	Plymale Foundation Fund \$874,518.87
Dick and Elsie Byrne Fund \$22,203.63	Eldridge "E" & Elizabeth Greene Hoke Fund \$11,890.99	Porter, Rolfe and Welborn Fund \$19,137.58
Jim and Maxine Candler Family Fund \$38,886.81	Cinda and George Hurt Fund \$5,885.71	Pryor / Newton Fund \$13,854.96
Sally J. Capps Memorial Fund \$4,508.22	Larry Donald Huskey Memorial Fund \$14,306.14	Donna Hladik Smith Born to Read Fund \$27,464.50
Kim and Dan Carey Fund \$12,118.15	Edwin Nelson James Jr. Memorial Fund \$16,361.22	Frances Cortright Stowers Charitable Fund \$152,152.24



Fair Market Value as of June 30, 2014

Walker and Sallie Sydnor Family Fund \$14,937.05	Beth Johnson Boatner Scholarship Fund \$31,642.33	Dr. Gordon K. Leonard Fund \$48,750.84
Marcus Cameron Trent Fund \$39,820.10	Jane Barringer Bowen Educational Fund \$15,185.71	Mario Luongo Memorial Fund \$14,928.70
Kay and Kent Van Allen Fund \$10,904.58	Dorothy M. Brooks Scholarship Fund \$11,878.44	Lynchburg Academy of Medicine Alliance Fund \$32,513.46
Sarah (Honey) Finger Warren Fund \$7,447.86	Daniel Christian Nursing Scholarship Fund \$24,678.73	Lynchburg Area Ministerial Association Fund \$45,904.97
Kenneth L. & Bertha S. White Fund \$205,161.99	Dunbar High School Legacy Fund \$125,984.28	Martin Memorial Scholarship Fund \$54,922.47
Bishop Norton and Virginia Wilder Fund \$7,247.93	Donald and Virginia Farmer Scholarship Fund \$49,405.79	C. W. Seay Scholarship Fund \$38,849.15
Genna Chambers Wiley Fund \$40,055.16	Jill Gardner Memorial Scholarship Fund \$24,958.79	Marguerite F. Singleton Scholarship Fund \$60,467.93
Jeff and Sandra Wilson Fund \$38,305.13	Wally Gilbert Fund \$24,999.57	Brad Sowers Memorial Art Scholarship Fund \$23,183.77
Maggie and Woodrow Wilson Foundation Fund \$12,751.93	Edward Christian Glass Scholarship Fund \$112,394.22	Louise L. Terrell Scholarship Fund \$41,013.06
Anonymous I Fund \$60,934.17	Mary L. Gregory Scholarship Fund \$37,885.17	Trench Scholarship Fund \$16,283.19
Anonymous III Fund \$22,324.75	Ted Hapgood Scholarship Fund \$29,330.99	Valley View Residents Scholarship Fund \$84,047.18
<b>Scholarship Funds</b>	Sallie Holland and Wesley Peters Hicks Math Scholarship Fund \$18,791.75	<b>Temporary Funds</b>
Amherst County Retired Teachers Association Scholarship Fund \$36,865.97	Ella M. Lawless Scholarship Fund \$11,153.62	VLGMA Scholarship Fund \$51,916.06
Appomattox County Education Foundation Fund \$197,612.30	Edith B. Lee Scholarship Fund \$11,187.69	<b>Charitable Gift Annuities</b>
Bedford County Scholarship Fund \$11,965.70		Bill and Mary Jane Hobbs \$122,970.68

# Our *Grants* 2013-2014

In 2014, The Greater Lynchburg Community Trust awarded \$1,521,165 to 140 charitable organizations, as well as 16 schools, colleges, and universities.

## **Charitable Organizations**

Academy of Fine Arts - Lynchburg

Adult Care Center

Altavista Area YMCA

Altavista Area/Campbell County Habitat

Alzheimer's Association of Central and Western Virginia

Amazement Square

American Red Cross - Historic Virginia Chapter

Amherst County Habitat for Humanity

Amherst County Museum & Historical Society

Anne Spencer House & Garden Museum, Inc.

Appomattox 1865 Foundation

Avenel Foundation

Avoca Museum

Awareness Garden Foundation, Inc.

Bedford Area Education Foundation

Bedford Community Christmas Station, Inc.

Bedford Community Orchestra

Bedford House, Inc.

Bedford Museum & Genealogical Library

Bedford Ride

Bedford Rotary Club Foundation Inc.

Big Brothers Big Sisters of Central VA

Big Island Emergency Crew

Big Island Library

Big Island Volunteer Fire Department

Big Otter Mill Foundation, Inc.

Blue Ridge Area Food Bank

Blue Ridge Autism and Achievement Center

Blue Ridge Pregnancy Center

Boonsboro Volunteer Fire and Rescue

Bower Center for the Arts

Boys & Girls Club of Greater Lynchburg

Camp C.H.I.L.D.

Camp Kum-Ba-Yah, Inc.

Campbell County Historical Society

Cantate, the Children's and Youth Choir  
of Central Virginia

CASA of Central Virginia

Center for Advanced Engineering & Research

Centra Foundation

Central Virginia Academy for Nonprofit Excellence, Inc.

Children's Miracle Network

Churches for Urban Ministry

Citizens for Adult Literacy and Learning, Inc.

Coalition for HIV Awareness and Prevention

Court Street Baptist Church

Court Street United Methodist Church

CVCC Educational Foundation, Inc.

Dance Theatre of Lynchburg

Drive-To-Work

E. C. Glass High School Athletics

E.C. Glass High School Theatre

Eastern Mennonite University

Economic Development Authority of Lynchburg

Elizabeth's Early Learning Center

Endstation Theatre Company

Faith Christian Academy

Free Clinic of Central Virginia

Friends of the Lynchburg Public Library

Future Focus Foundation

Habitat for Humanity - Greater Lynchburg

Historic Sandusky Foundation

Holy Cross Catholic Church

Horizon Behavioral Health-Parent Center

Humane Society for Campbell County, Inc.

Interfaith Outreach Association

James River Association

James River Council for the Arts & Humanities

James River Day School

Jefferson Choral Society

Johnson Health Center

Jones Memorial Library

Jubilee Family Development Center

Junior League of Lynchburg

Lactation Health Resources, Inc.

Lake Christian Ministries, Inc.

Legacy Project, Inc.  
Lynchburg Area Food Bank  
Lynchburg Beacon of Hope  
Lynchburg City Schools Edu. Fdn., Inc.  
Lynchburg Covenant Fellowship, Inc.  
Lynchburg Daily Bread, Inc.  
Lynchburg Grows  
Lynchburg Historical Foundation, Inc.  
Lynchburg Humane Society  
Lynchburg Literacy Council, Inc.  
Lynchburg Little League, Inc.  
Lynchburg Public Library  
Lynchburg Road Runners  
Lynchburg Symphony Orchestra  
Lynchburg Tennis Patrons Association  
Mary Bethune Academy  
MDM Networking, Inc.  
Meals on Wheels  
Mental Health America of Central Virginia  
Miller Home of Lynchburg  
Miriam's House  
Mt. Carmel Church Cemetary Association  
National D-Day Memorial Foundation  
New Vistas School  
Opera on the James, Inc.  
P.E.O. Foundation  
Park View Community Mission  
Patrick Henry Memorial Foundation  
Planned Parenthood Health Systems, Inc.  
Poplar Forest  
Presbyterian Homes and Family Services, Inc.  
Radford University Foundation  
Randolph College  
Reach Out and Read Virginia  
Rebuilding Together - Lynchburg  
Rivermont Area Emergency Food Pantry  
Rivermont Evangelical Presbyterian Church  
Riverviews  
Shriners Hospital for Children  
Smart Beginnings of Central Virginia  
SML Good Neighbors, Inc.

Society of St. Andrew, Inc.  
South Central Spay and Neuter Clinic  
Southern Memorial Association  
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St. Stephen's Episcopal Church  
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The Arc of Central Virginia  
The Ellington Fellowship Playhouse  
The Lynchburg Chapter of The Links, Inc.  
The Salvation Army  
United Way of Central Virginia  
Virginia Center for Inclusive Communities  
Virginia Center for the Creative Arts  
Virginia Hunters Who Care, Inc.  
Virginia Legal Aid Society  
Virginia Repertory Theatre  
Wintergreen Adaptive Sports  
WordWorks Lynchburg, Inc.  
YMCA of Central Virginia  
Young Audiences of Virginia  
YWCA of Central Virginia

### Scholarships

Local students received a total of \$54,879.04 in scholarships in 2014 to attend 16 schools:

Cape Cod Community College  
Central Virginia Community College  
George Mason University  
Hampden-Sydney College  
James Madison University  
John Carroll University  
Liberty University  
Longwood University  
Lynchburg College  
North Carolina A&T University  
Old Dominion University  
Radford University  
Randolph College  
University of South Carolina  
University of Virginia  
Virginia Tech

# 2013–2014 *Contributors*

The Greater Lynchburg Community Trust recognizes and thanks the individuals and organizations who have made contributions in the year 2013-2014. Their names appear below.

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**\$10,000+**

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**\$5,000 - \$9,999**

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*Numerous memorial and honorary gifts were made to The Community Trust during the year. A listing of those memorialized or honored may be found on our website at [www.lynchburgtrust.org](http://www.lynchburgtrust.org). The Community Trust has made every effort to provide a complete and accurate listing of our donors. If you notice an error or omission, please accept our apologies and contact us at (434) 845-6500.*

# Our *Youth Philanthropy* Program

The goal of The Community Trust Youth Philanthropy Program is to instill in our youth awareness of our community needs and the importance of volunteering and philanthropy.

Two seniors, one male and one female, from 11 high schools within The Community Trust's service area serve for one year on The Youth Philanthropy Committee of The Community Trust and are responsible for granting \$10,000 or more to deserving local charitable organizations that serve the needs of youth in our area. The students are nominated to this program by faculty and staff of their respective school based on their demonstration of excellence in academics, leadership, and community service.

The committee is supervised by Community Trust board members and meets periodically throughout the school year. The students review grant applications, rate the applications, perform site visits of the top 8 applicants and prepare presentations on these applications for the committee as a whole. From this process, a final vote is taken to determine which agency will receive the grant.



Students and advisors listen attentively to student presentations on nonprofit organizations visited.



These high school seniors awarded \$10,000 to Miller Home of Lynchburg and \$5,000 to Lynchburg Beacon of Hope.



# *The Legacy Society*



*Ruth Stemmons died in 1998.  
John Stemmons died in 2001.*

*This year, Ruth and John Stemmons will fund teacher enrichment programs in Bedford; will help the poor through the Bedford Milk and Egg Voucher Program; will support the Bedford Community Christmas Station; will pay for computer upgrades at the Bedford Museum; will support the Bedford Community Orchestra; and will purchase much needed non-food items for Bedford citizens.*

Ruth Thomas, a native of Bedford, and John Stemmons, a W&L student, met in the late 1920s when Ruth's brother brought his W&L classmate, John, home to Bedford for the holidays. A romance blossomed, Ruth and John married four years later, and the young couple moved to Texas. They were married for 66 years, but Ruth never forgot her beloved Bedford and the Blue Ridge Mountains. The Thomas/Stemmons Fund was established in 2002 as an unrestricted fund, and it has provided funding over the years for numerous worthy programs primarily in the Bedford area.

## *The Legacy Society*

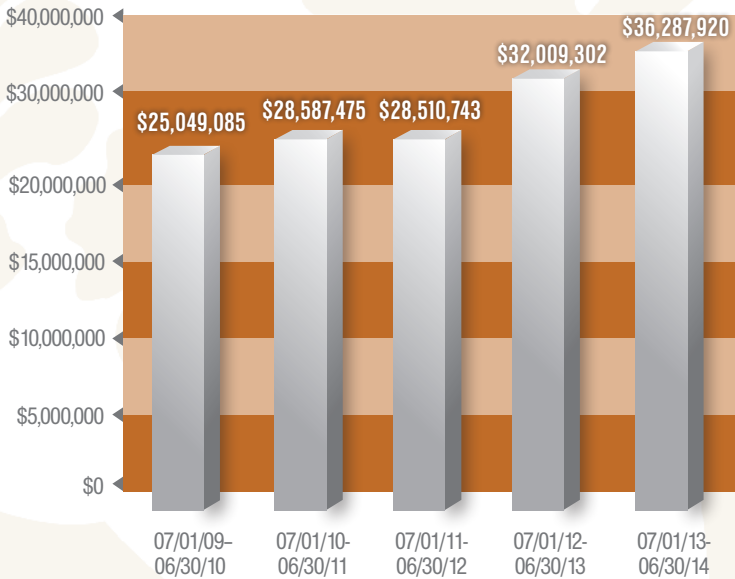
The Legacy Society recognizes individuals and families who have supported The Greater Lynchburg Community Trust by establishing planned gifts to The Community Trust to benefit our community. Through their philanthropy, these Legacy Society members are helping to meet the needs of our community for generations to come.

Josephine S. Bennett  
George E. Calvert, Jr.  
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Anonymous (3)

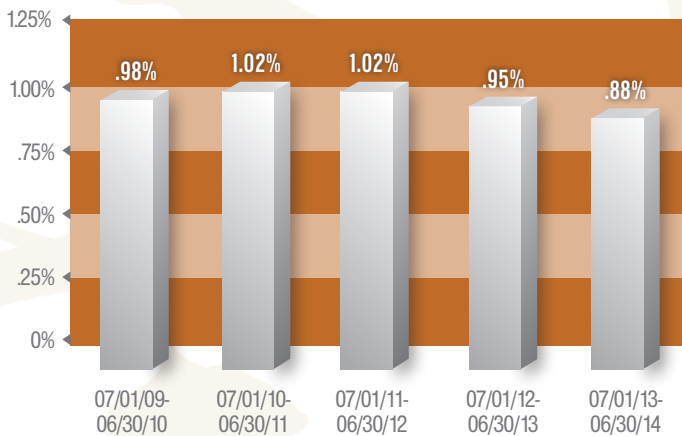
# Our *Financials*

## Total Investments:



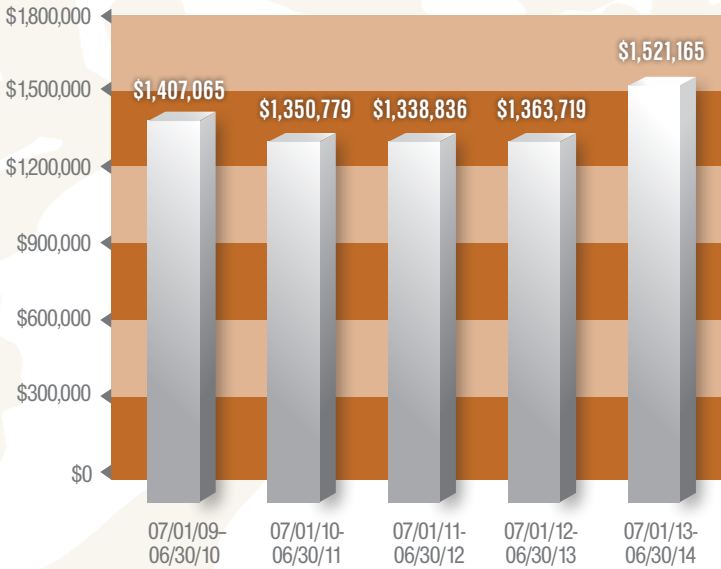
The Greater Lynchburg Community Trust was founded October 12, 1972 with three funds and a total value of \$14,000. Foundation assets have grown from \$702,000 on September 30, 1992 to \$36,287,920 by year-end June 30, 2014. The Foundation grew from 16 funds to 228 funds during the same period. We credit our success to our donors, volunteer board members and advisors who saw the value of The Greater Lynchburg Community Trust and encouraged their friends and clients to consider establishing long-term philanthropic funds with The Trust.

## Operating Expenses as a Percent of Total Investments (Trailing Three-Year Average)



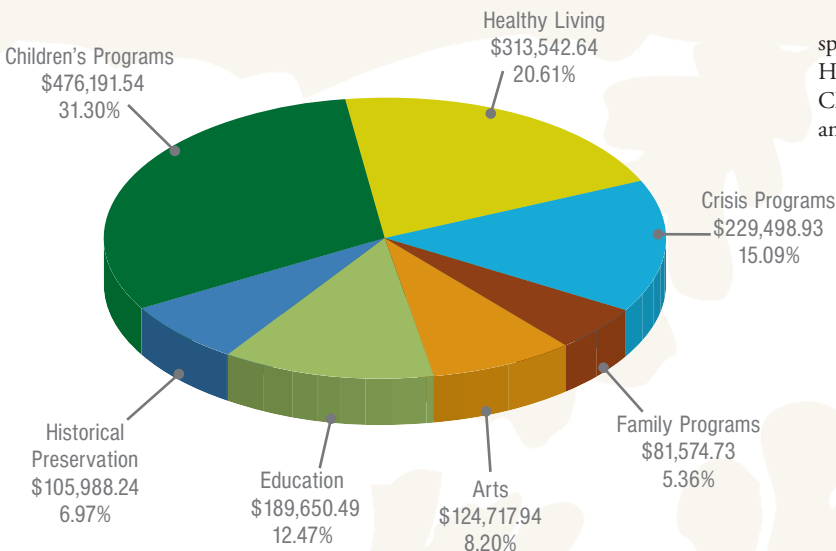
Keeping operating expenses to a minimum is a priority of The Greater Lynchburg Community Trust. This includes general and administrative costs, fund raising expenses, and program costs. Expenses as a percent of total investments have remained relatively stable. The one-year operating expense percent for FY 07/01/13 - 06/30/14 was .76%.

## Annual Grants Awarded:



Annual grants awarded have increased 16.1% over the past five years. Our steady growth in foundation assets has enabled us to expand our grant-making dollars in order to meet critical needs in our communities.

## Grants Awarded: Fiscal Year 07/2013 – 06/2014



Grants were made across a broad spectrum, including the Arts, Education, Historical Preservation, Healthy Living, Children's Programs, Family Programs, and Crisis Programs.

# Why Do People Choose To Give To The Greater Lynchburg Community Trust?

- We build endowment funds that grow and benefit the community forever.
- We help donors create an individual or family legacy through named funds.
- We are a local organization meeting a broad range of changing local needs.
- We provide a simple way to fulfill multiple charitable interests.
- We deliver personalized donor service.
- We offer maximum tax advantage for income and estate tax purposes.
- We can preserve donor intent even when community needs change.
- We prudently manage our assets through qualified investment managers.
- We carry out our activities with low-cost administration.
- We offer a variety of simple, flexible, and effective options for those who wish to give.
- We offer Temporary Funds where distribution of principal is possible.

## Ways Of Contributing

- Outright gifts of cash, securities, real estate or other assets.
- Deferred gifts with income retained by the donor through CRATs or CRUTs.
- Wills. This is an excellent opportunity for a final testimony to what has been most meaningful in one's lifetime.

For more information visit our website at:  
[www.lynchburgtrust.org](http://www.lynchburgtrust.org)



Information concerning grant applications may be secured online or by writing or phoning:

### The Greater Lynchburg Community Trust

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Fax 434/845-6530  
[www.lynchburgtrust.org](http://www.lynchburgtrust.org)



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Standards for U.S. Community Foundations

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