

CONTENTS

- 2 Summer Grant Awards
- 3 TPF Scholarship Recipients  
Summer Teacher  
Creativity Grants  
Lilly Endowment  
Community Scholarship  
Recipient
- 5 Summer Scholarship Recipients  
Women's Giving Circle  
Administrative Assistant Intern

# Foundation FOCUS

The newsletter of The Portland Foundation,  
Portland, Indiana

A Community Foundation

## THE PORTLAND FOUNDATION ANNOUNCES MATCH DAY

### Mark your calendars for 11/12/13!

The Portland Foundation is pleased to announce a Matching Grant Program. Gifts totaling between \$111 and \$12,130 made to new or existing endowments will be matched at 20% as a way to leverage your charitable dollars as a donor. The match will apply to gifts made between 11:00 a.m. and 11:00 p.m. on November 12, 2013 or until the \$10,000 cap is committed, whichever comes first. The gift must be made online only at [www.portlandfoundation.org](http://www.portlandfoundation.org) using the Donate Now button. Increase your charitable deductions, improve the quality of life in Jay County, and make your money work for you all at the same time!

Your Gift	Our Match	Your Total Gift
\$111.00	\$22.20	\$133.20
\$200.00	\$40.00	\$240.00
\$300.00	\$60.00	\$360.00
\$400.00	\$80.00	\$480.00
\$500.00	\$100.00	\$600.00
\$600.00	\$120.00	\$720.00
\$700.00	\$140.00	\$840.00
\$800.00	\$160.00	\$960.00
\$900.00	\$180.00	\$1,080.00
\$1,000.00	\$200.00	\$1,200.00
\$1,213.00	\$242.60	\$1,455.60
\$2,500.00	\$500.00	\$3,000.00
\$5,000.00	\$1,000.00	\$6,000.00
\$7,500.00	\$1,500.00	\$9,000.00
\$10,000.00	\$2,000.00	\$12,000.00
\$12,130.00	\$2,426.00	\$14,556.00



The mission of The Portland Foundation is to enhance the quality of life for the people of Jay County, Indiana, now and for generations to come, by building community endowment, effecting significant impact through grantmaking and providing leadership on key community issues.

## 2013 SUMMER GRANT AWARDS

*The Board of Trustees of The Portland Foundation approved grants totaling \$91,107 for 19 Jay County projects for the second half of 2013. \$87,978 comes from unrestricted funds and \$3,129 comes from field of interest funds. Those grants are as follows:*

**Arts Place, Inc.** - \$10,000 to fund the summer 2014 Arts in the Parks program.

**Arts Place, Inc.** - \$2,500 to help fund an extensive strategic planning process.

**Community and Family Services** - \$2,000 to fund the Heartlite program.

**Community and Family Services** - \$1,500 to fund the free STD Clinic in Jay County.

**Jay County Special Olympics** - \$3,250 to fund the purchase of new uniforms, golf clubs, golf shoes, equestrian helmets and fuel costs.

**Jay County Civic Theatre, Inc.** - \$4,000 to fund new lighting and sound equipment.

**Jay County Historical Society** - \$2,420 towards funding for new multimedia preservation and service projects.

**Jay County Historical Society** - \$1,400 to fund the purchase of 4 new glass display cases.

**Jay County Humane Society** - \$4,500 to fund a new dividing fence at the shelter.

**Jay County Humane Society** - \$5,000 to help fund the Spay and Neuter program.

**Jay County Trails Club** - \$2,500 to fund a professional consultant to give direction on creating multiuse recreational trails in Jay County.

**Jay Patriot Band Boosters** - \$2,132 to fund the purchase of a new tarp, foam background and a new generator.

**Jay County Boys Club, Inc.** - \$6,250 to help support the free senior citizen programming.

**John Jay Center for Learning** - \$13,500 towards the installation of a sprinkler system and fire protection in the John Jay Center for Learning basement.

**John Jay Center for Learning** - \$6,000 to help support the C3 (Career-College-Connection) program.

**John Jay Center for Learning** - \$12,000 for window blinds and soft surface on the floors of the John Jay Center for Learning Café.

**Mad Anthony's Children's Hope House** - \$2,850 to help support overnight stays for Jay County Families.

**Second Harvest Food Bank of East Central Indiana** - \$7,000 to help support the Tailgate program.

**Youth Service Bureau of Jay County, Inc.** - \$2,305 to help support a special pilot program, Born to Learn Camp.

### LEGACY SOCIETY

Planned giving allows people to make charitable gifts beyond those which they might give on an outright basis. The Portland Foundation's Legacy Society provides a meaningful way to recognize individuals *now* for gifts that will be realized sometime in the future. While the vehicle for the gifts may differ, the effect is the same - **enhancing the lives of Jay County residents.**

The Portland Foundation understands and appreciates the thoughtful planning that will result in gifts of bequests, charitable trusts, and life insurance policies. Participation is easy. For membership in the Legacy Society, a signature is all that is required. Gifts can be used in a variety of ways to achieve a range of charitable goals. Members will be recognized in Foundation publications and will be invited to participate in special events.

*On behalf of future generations, we thank those who have let us know of gifts to be given to The Portland Foundation in the future:*

*Julie A. Forcum  
Joe and Ethelyn Glentzer  
Douglas Inman*

*Louis, Glenna and Gary Stephen  
Mark F. Wilson*

*One  
generation  
plants the  
trees . . . those  
following  
enjoy the  
shade.*

## 2013 PORTLAND FOUNDATION SCHOLARSHIP RECIPIENTS

The Portland Foundation awarded \$175,200 in scholarships to 72 students in 2013

Lindsay Aker	Makayla Jobe
Catherine Alig	Courtney Knight
William Back	Paige Lennartz
Jenna Barber	Avery Loyd
Darren Bogenschutz	Kyle Loyd-Reier
Jennifer Braun	Tasha McCowan
Kathryn Braun	Brock McFarland
Abby Broering	Jessica Mills
Andrea Bruggeman	Brittani Miller
Kevin Minnich	Emily Morris
Mariah Brunswick	Laura Morrison
Andrea Buck	Jeremy Moser
Lynsay Buckland	Anna Muhlenkamp
Samantha Compton	Kyle Murdock
Alexis Cook	Emily Newman-Wendel
Dylan Cope	William Osborne
Jill Dirksen	Ravi Patel
Sarah Dirksen	Caden Price
Alexander Dunn	Katelyn Reier
Catelynn Fairchild	Miranda Reinhart
Alysia Fennig	Raistlin Rice
Laineelee Flowers	Mitchel Rigby
Audrey Franklin	Lauren Runkle
Taylor Franklin	Leslie Schubert
Kaylyn Frye	Clayton Scott
Kortney Garringer	Casey Shannon
Grace Goodman	Kyle Siegrist
Liza Haggenjos	Robert (Willie) Skiver
McKayla Haines	Morgan Smitley
Audrey Hall	Katie Snyder
Erin Hilfiker	Dylan Swingley
Samantha Homan	Julie Valentine
Mark Houck	Abbey Vance
Christopher Hudson	Joshua Wellman
Stephanie Hudson	Mikayla Wellman
Rachelle Jackson	Shelby Wendel

## 2013 SUMMER TEACHER CREATIVITY MINI GRANT

**Ms. Carol Knarr Gebert– Jay County High School Drama Club** - \$250 to fund the purchase of a Mimio Pad.

to fund the purchase of a table saw and protective eyewear for the High School scene shop.

**Ms. Janelle Kirby – Westlawn Elementary School 3<sup>rd</sup> Grade** - \$250 to fund the purchase of a Mimio Pad.

**Ms. Holly Farr – Westlawn Elementary School 4<sup>th</sup> Grade** - \$250 to fund the purchase of a Mimio Pad.

**Mr. James Roberts – Westlawn Elementary School 5<sup>th</sup> Grade** - \$250 to fund the purchase of a Mimio Pad.

**Ms. Jennifer Johnson – Westlawn Elementary School 3<sup>rd</sup> Grade** - \$250

## 2013 LILLY ENDOWMENT COMMUNITY SCHOLARSHIP RECIPIENT

A Jay County High School senior has been named to receive full-tuition, four-year scholarship as The Portland Foundation's 2013 Lilly Endowment Community

Scholar. Andrea Bruggeman will receive full tuition to the Indiana College of her choice and a \$900 yearly stipend for required books and equipment. Andrea is attending Purdue University and studying Animal Sciences with a concentration in Pre-Veterinary.



## DICTIONARY PROJECT

For the eleventh consecutive year, The Portland Foundation has partnered with *The Commercial Review* to provide Jay County third graders with their own student dictionary. To date, more than 3,300 Jay County students have received dictionaries.



# The Charitable Gift Annuity – *A Gift that Gives Back*



Each year thousands of caring individuals use the charitable gift annuity to provide major financial support for charitable organizations. In many cases, this time-tested technique has permitted gifts that otherwise might not have been made. Elizabeth, age 70, is a good example. Although she has always wanted to make a significant gift to her favorite charity, she feels she cannot afford to lose any income. Through a gift annuity arrangement she is able to give \$10,000 to a charity which, in turn, commits itself to pay her an income of \$510 a year for as long as she might live. Moreover, her annuity payments will be favorably taxed. Elizabeth's gift also will result in an immediate income tax savings from the charitable deduction. For Elizabeth, a charitable gift annuity presented an opportunity to do more for herself and charity.

## What is a Charitable Gift Annuity?

A charitable gift annuity is a life income gift that benefits both the donor and the charity. The donor makes a one-time gift to the charity, and the charity agrees to pay a fixed amount every year for the lifetime of one or two designated individuals. The fixed amount of income is based on the age of the annuitant at the time the gift is made.

## How does a Charitable Gift Annuity work?

The donor makes an irrevocable gift to The Portland Foundation with cash or an appreciated asset (often securities). The donor also selects the annuitant, who may be the donor or another person. In return for the gift, the Foundation agrees to pay a fixed lifetime income to the annuitant. Payments may be received quarterly, semiannually, or annually. There may be two annuitants (but no more) under a charitable gift annuity. The payout rate for two annuitants is lower than for a single annuitant.

## What tax benefits can you expect from a Charitable Gift Annuity?

There are three potential tax benefits:

- In the year that the charitable gift annuity is set up, the donor may take an income tax charitable deduction based on the value of the gift to the Foundation (though not the entire transfer).
- Some portion of the annuity payments may be income tax free until the annuitant reaches his or her life expectancy.
- If an appreciated asset is used to fund the charitable gift annuity, capital gains tax liability may be spread out over your life expectancy (if you name yourself as annuitant).



## What payout rate will you get from a Charitable Gift Annuity?

The payout rate depends on the age of the annuitant at the time the gift is made: the older the annuitant, the higher the rate. Also, the rates are lower for a charitable gift annuity for two lives. Finally, the rates are higher for a deferred charitable gift annuity (where the date of first payment is delayed for a specified number of years). The Foundation can provide you with our current rates.



## Why are Charitable Gift Annuities so popular today?

Charitable gift annuities provide many people the opportunity to make a meaningful gift that might not otherwise be possible. Charitable gift annuities are safe arrangements backed by the general assets of the Foundation, and they provide good, even excellent, payouts. Many donors have set up several charitable gift annuities over time to take advantage of payout rates that increase as they age and to supplement their retirement plans. Easy to set up, the charitable gift annuity is a simple and effective tool for charitable giving and retirement planning.

For more information about The Portland Foundation's Charitable Gift Annuity Program, contact Executive Director, Doug Inman at 260-726-4260.

# SUMMER SCHOLARSHIP RECIPIENTS

## **Altrusa Club of Portland Scholarship**

Latisha Blankenship

## **Dr. Ara C. and Gay B. Badders Medical Scholarship**

Derek Arnold

Trey Dunn

Libby Weaver

Haley Brandt

Thomas Shrack

## **Marseal T. Deweerd, Edith T. Horn, and Virgie M. Brady Memorial Scholarship**

Kari Hemmelgarn

## **East Central Opportunities Scholarship**

Kelsey Powell

## **Charles & Ruth Joos Scholarship**

Thomas Bowen

Alisha Grider

Amanda May

Christina Castillo-Short

Sarah Horn

Megan May

## **Jerry R. Pierce Memorial Scholarship**

Richard Foster Jr.

Max Morgan

Amazia Switzer

Brock McFarland

Kelsey Powell

## **Robert Quadrozzi Memorial Scholarship**

Wendy Robbins

---

## WOMEN'S GIVING CIRCLE

The Portland Foundation's Women's Giving Circle has awarded a grant in the amount of \$1,000 to a Jay County project focused in the area of programs that benefit the Elderly.

**State of the Heart Hospice** - \$1,000 to help fund care for patients served in Jay County.



---

## ADMINISTRATIVE ASSISTANT INTERN



Linsey Foerg is The Portland Foundation's fall semester intern. She is a senior at Ball State University in Muncie, IN and majoring in Property Management. Linsey will be taking care of the administrative duties.



**THE  
PORTLAND  
FOUNDATION**

112 East Main Street  
Portland, IN 47371  
260-726-4260  
260-726-4273 Fax

[tpf@portlandfoundation.org](mailto:tpf@portlandfoundation.org)  
[www.portlandfoundation.org](http://www.portlandfoundation.org)

Douglas L. Inman, Executive Director  
Jessica L. Cook, Program Officer  
Linsey Foerg, Intern

**BOARD OF TRUSTEES**

Mary Davis, President  
Dean Jetter, Vice President  
Emily Goodrich-Roberts, Secretary/Treasurer  
Pat Bennett  
David Fullenkamp  
Rex Journay  
Ron Laux  
John Moore  
Stephanie Robinson



NONPROFIT ORG.  
U.S. POSTAGE  
**PAID**  
PORTLAND, IN 47371  
PERMIT NO. 4

**Return Service Requested**

*The following individuals were remembered or honored  
through gifts to The Portland Foundation from  
May 1, 2013 to September 30, 2013*

*Memorials*

Matt Aker  
Bev Bussear  
Bill Bussear  
Alva Dean Craig  
Kathleen Galbraith  
Gladys Hardy  
Mary Harrod  
Rosemary Hogg  
Zack Hummer  
Dr. Tom Jones  
Lee McDaniel

Charlotte Morehous  
Loren Ogborn  
Bob Quadrozzi  
Kris Rose  
Paul Saxman  
Dennis Shaneyfelt  
Bob Stephens  
Will Sudhoff  
Everett Taylor  
Stan Teeter  
Justin Valentine

*Honorariums*

Deceased Jay County High School  
Class of 1983 Classmates  
Phil Frantz's 69<sup>th</sup> Birthday