



2016-2017 annual report

CONNECTING PEOPLE
WHO CARE WITH CAUSES
THAT MATTER...FOREVER.

Williamsburg
**COMMUNITY
FOUNDATION**





Mission Statement

The Williamsburg Community Foundation connects people who care with causes that matter in our community...forever.

We pursue this mission by:

- Building permanent, flexible endowment funds that respond to emerging and changing community needs;
- Providing effective stewardship of charitable funds;
- Advising donors with varied interests to help them achieve their philanthropic goals; and
- Serving as a resource, catalyst and coordinator for charitable activities.

Vision Statement

The Williamsburg Community Foundation's vision is to be a trusted philanthropic leader enhancing all aspects of life in the area through its unique grant and scholarship programs and its delivery of the highest quality donor services.

Values

Integrity and Stewardship
 Innovation and Flexibility
 Inclusiveness and Diversity
 Community Focus

2016 board of trustees

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Sterling Nichols

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Wilma Register Sharp

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Anthony J. Taylor M.D.

Christine Williamson

VISION 2020

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Robert G. Beck, *Honorary Chair*

Honorary Trustees

Colin G. Campbell

W. Taylor Reveley III

Staff

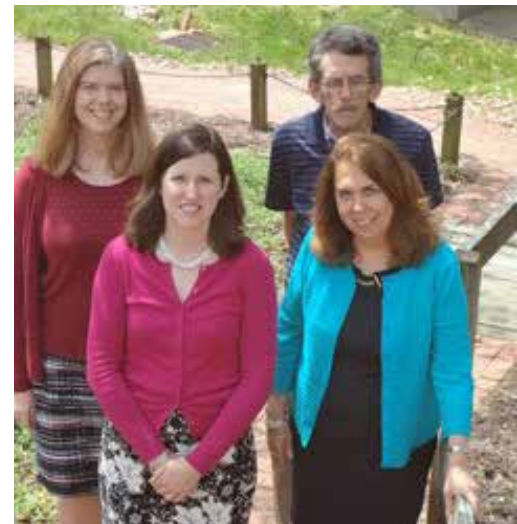
Nancy Coté Sullivan, *Executive Director*

Jeff Dawson, *Accountant*

Ginny Gasink, *Development & Communications Officer*

Kris MacKenzie, *Office Manager*

Van Ruckman, *Webmaster*



Please contact the staff at 757-259-1660 or office@williamsburgcommunityfoundation.org if you would like additional information about how you can get involved.

Above: 2016 Board of Trustees. Not pictured: Linda R. Caviness, Susanna B. Hickman, Sterling Nichols, Howard W. Smith Sr., Christine Williamson

a message from Paul W. Gerhardt

CHAIR OF THE BOARD 2016-2017

This past year the Williamsburg Community Foundation challenged you to increase your financial support as an investment in future grants and scholarships. I am very pleased to report that you have helped the Foundation thrive during the 2016-17 fiscal year.

The Board set ambitious goals for VISION 2020, the Foundation's core initiative, and the first full year has exceeded expectations. Over \$1 million in contributions were made during the year.

The six area endowment funds, which are the cornerstones of the initiative, grew considerably, with the Health and Community Wellness Fund becoming the first to meet the \$20,000 matching challenge. WCF received gifts or pledges from donors establishing named funds in three of our six focus areas: Environment and Conservation, Senior Services, and Health and Community Wellness. (See chart below.)

In addition to gifts received, the net investment return of 10.72% during the calendar year resulted in extraordinary growth for WCF endowment funds.

More of you than ever before donated to the Annual Fund. In addition, a number of individuals joined the Legacy Society by pledging gifts from their estate plans.

Because of your support for our work, WCF will invest more in our community next year and over the long term. You can read more concerning the accomplishments achieved this year and about a few of the people who enabled them throughout this annual report.

I would like to thank you, as well as our volunteer board and committee members, and staff for stepping up to the plate, joining VISION 2020, and helping WCF reach \$6.2 million in assets.



WCF Past Chairmen

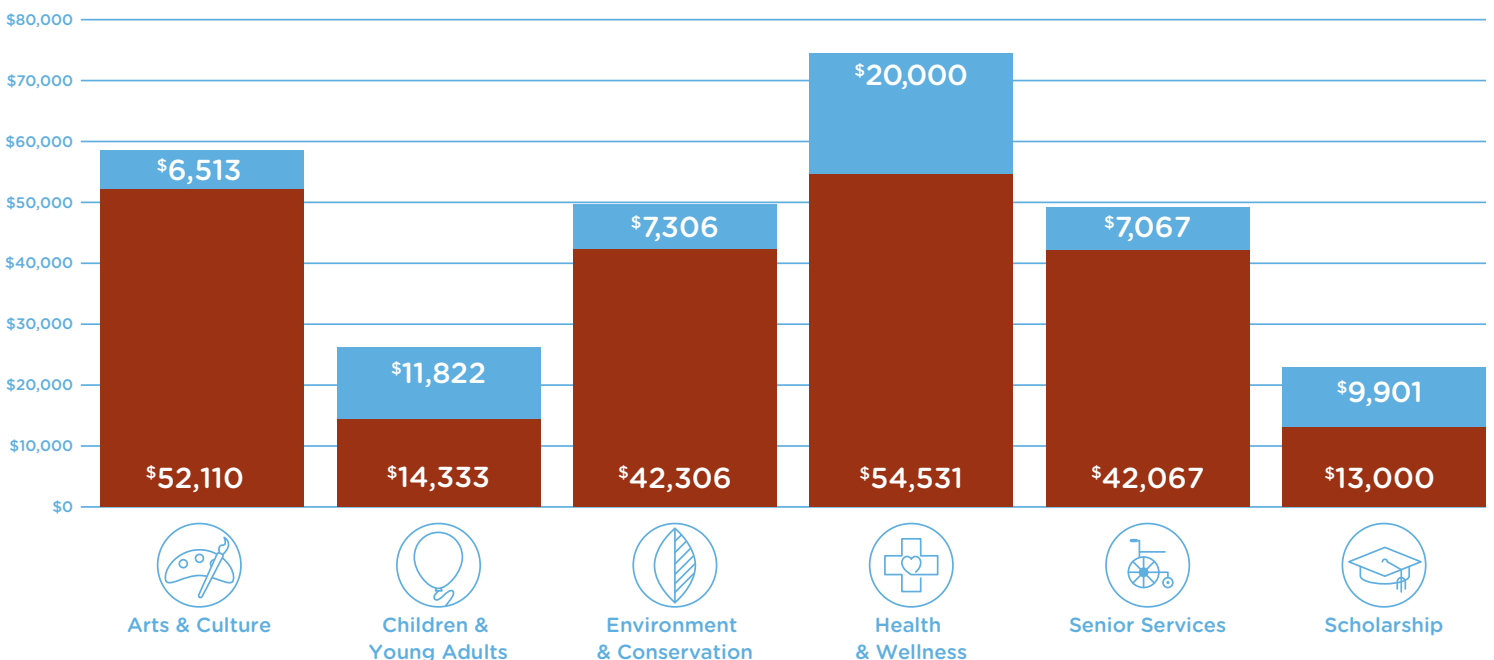
- Trist B. McConnell
- John C. Jamison
- John R. Curtis Jr.
- Vernon M. Geddy III
- Karen A. Jamison
- Michael D. Maddocks
- Margaret Beck Pritchard

Paul W. Gerhardt | Chair

Vision 2020 Field of Interest Endowment Funds

● Gifts ● Match Allocated

Each of these funds will award grants within that field of interest. Gifts and pledges as of 1/31/17:



community endowment funds

1999 Trellis Benefit Fund
James and Gail Allburn Family Fund
Andrews-Squire Family Fund
Anonymous (2)
Robert Travis Armistead Memorial Fund
Baker Family Community Endowment Fund
Edna and James Baker Fund
Norman Beatty Memorial Fund
Robert and Hope Beck Fund
Margaret and Robert Birney Fund
Susan Britcher Charitable Fund
William and Cynthia Bryant Fund
Terry Emory Buntrock Fund
Joseph and Susan Burkart Fund
Bette and Nash Castro Fund
Linda and Tim Caviness Fund
Ryan Gregory Cooke Memorial Fund
Corson Family Fund
Covenant Wealth Advisors/Topping Family Fund
Donald E. and Janet W. Craig Fund
Charles and Ginny Crone Family Unrestricted Fund
Nan and Pete Cruikshank Fund
John and Julia Curtis Endowment Fund
Darling Family Fund
Derrick Family Foundation Fund
Derrig Family Fund
S. Jane deSolms Charitable Fund
Jep and Lis Doley Family Fund
Margaret and Sean Driscoll Family Fund
DWA Fund
Rex and Paulette Ellis Fund
Catherine and Paul Freiling Family Fund
Geddy Family Funds
Good Life Fund
Baron and Ellin Gordon Fund
Hamilton-Phillips Fund
A. Kent Harrell and Kendall S. Kerby Fund
The Harris Family Fund
R.M. (Sam) Hazelwood, Jr. Family Fund
Henderson Family Fund
T. Christian Henderson Family Fund
Joseph and June Hennage Fund
Bruce and Kathy Hornsby Fund
Mary Speake Humelsine Fund
John A. Hyman Fund

John and Carol Jamison Fund
John Jamison Creative Leadership Fund
Tom and Karen Jamison Family Fund
Kiley Unrestricted Fund
Stephanie H. and Robert A. King Fund
Glenn and Bonnie Krochmal Fund
Carolyn and Ronald Lodzieski Fund*
Tessa and Albert Louer Fund
Montgomery and Pamela Mason Fund
Mathews Family Unrestricted Fund
Helen and Trist McConnell Fund
Walter G. and Betty C. McDonald Memorial Fund
Mellette Family Endowment Fund
Joseph and Linda Montgomery Family Unrestricted Fund
Sandy and Rick Nahm Fund
Old Point Bank Fund
Optimal Service Group of Wells Fargo Fund
Tom and Mary Ellen Power Family Fund
Margaret Beck Pritchard Fund
Bob and Judy Rathert Fund
Phillip Richardson Family Trust
Ring Family Fund
Scharlop-Schultz Fund
Schievelbein Family Fund
Sculthorpe Charitable Fund
Wilma and Marc Sharp Community Endowment Fund
Stambaugh Family Unrestricted Fund
Paul and Bonita Stockmeyer Unrestricted Fund
Bill and Nancy Sullivan Family Fund
Tim and Anne Sullivan Fund
Jane and Robert Taylor Fund
Imogene and Roger Thaler Endowment Fund
TowneBank Fund
The Trust Company of Virginia Fund
Vermillion Family Fund
Harry and Judy Wason Fund
Peter and Kimberly Wendell Fund
Mildred B. West Fund
William C. and Elizabeth J. Wilhelm Endowment Fund
Christine and Forrest Williamson Fund
Wilson Family Fund
Sally P. and Kenneth M. Wolfe Fund

*New fund in 2016

types of funds

Community Endowment Funds

Unrestricted endowment gifts to the WCF are placed in the Community Endowment, which the Board of Trustees uses to address the changing needs of greater Williamsburg through a competitive process. Named funds within the Community Endowment may be established with a minimum gift of \$10,000.

Field-of-Interest Funds

A Field-of-Interest Fund allows a donor to select a particular area for grantmaking. Grant recipients will be selected through a competitive process. Named Funds may be established with a minimum gift of \$35,000.

Designated and Agency Endowment Funds

A Designated Fund allows the donor to select one or more specific charities to receive grants from the fund when the fund is established. Nonprofit organizations may establish an Agency Endowment Fund to support their work. Both of these funds may be established with a minimum gift of \$10,000.

Scholarship Funds

Scholarship Funds may be established with a minimum initial gift of \$35,000. Gifts in any amount can be made to support scholarships through the Williamsburg-James City County Scholarship Fund.

Donor-Advised Funds

The Donor-Advised Fund is a highly flexible option for donors who wish to be actively involved in their choice of grant recipients. Through this type of fund, a donor may support charities in the greater Williamsburg area and beyond. It is an excellent alternative to a private foundation, with greater ease of establishment and superior tax benefits. A Donor-Advised Fund may be established with a minimum gift of \$10,000.



Join vision 2020: Together We Will Continue to Enrich Our Community

The Williamsburg Community Foundation has developed the **VISION 2020 Initiative** to:

- Increase the number of families supporting greater Williamsburg through the Foundation,
- Provide greater education about and connection to local nonprofits for our donors and members, and
- Increase the pool of philanthropic capital available to the community by encouraging legacy giving.

Gifts in any amount to one of the six areas will support our community forever.

Field-of-Interest Funds

- An Occasion for the Arts Fund
- Arts & Culture Fund
- Children & Young Adults Fund
- Environment and Conservation Fund
- Health and Community Wellness Fund
- Genevieve McGiffert Memorial Fund for the Musical Performing Arts
- Senior Services Fund
- Williamsburg Fund for Women & Girls
- Williamsburg Landing Fund*

Scholarship Funds are listed on pg. 12

*New Fund in 2016

Presenting Sponsor for VISION 2020



IMPORT AUTOMOTIVE SPECIALIST

Top: Williamsburg Choral Guild is just one beneficiary of the McGiffert Fund.

celebrating a decade of the art of song THE GENEVIEVE MCGIFFERT FUND

Over the past ten years, the Genevieve McGiffert Fund for the Musical Performing Arts has supported a variety of performances that enrich our community. Founded by Genevieve's husband Michael McGiffert, and her longtime friend Linda Baker, the fund has provided \$11,400 in grants to organizations including the Williamsburg Music Club, Williamsburg Choral Guild, Williamsburg Symphony Orchestra, Opera in Williamsburg, and All Together, Inc.

The McGiffert Fund is an example of a **field-of-interest fund**, which allows the donor to select a particular area for grantmaking, such as the arts; the Foundation then makes grants within that field of interest through a competitive process. While serving as a Foundation trustee, Linda Baker often talked about the idea of setting up area funds so that donors could support those causes that meant the most to them. Thanks to the groundwork laid by Linda and others, the Foundation is now able to offer donors that option through our **VISION 2020** initiative.

"Music was the medium in which Genevieve White McGiffert moved, in her life's pursuit of numerous professional venues – performing, teaching, conducting and staging. As a teacher of song and singing, she taught the artwork of enhanced humanity. After her death in 2007, her late husband Michael McGiffert and I decided that establishing a fund in her name would ensure a perpetual resource to support musical performance in the Williamsburg community."

Linda Baker
Past WCF Trustee and co-founder
of the McGiffert Fund



competitive grant recipients

COMMUNITY ENDOWMENT AND FIELD-OF-INTEREST FUNDS

Grant recipients below applied for a grant through the Foundation's competitive process. They received support from the Foundation's Community Endowment or Field-of-Interest Funds. Several of the Foundation's generous Donor-Advised Fund holders have also chosen to support WCF's competitive grant applicants as funding partners. Those grants are also included on this list.

- | | | |
|--|---|--|
| <ul style="list-style-type: none"> All Together, Inc. The Arc of Greater Williamsburg Auxiliary of Sentara Williamsburg Regional Medical Center Avalon: A Center for Women and Children Child Development Resources Colonial Behavioral Health Dream Catchers Therapeutic Riding Center | <ul style="list-style-type: none"> FISH Gwendolyn's Wish Hospice House and Support Care of Williamsburg Housing Partnerships, Inc. James River Association Literacy for Life Olde Towne Medical & Dental Center Peninsula Agency on Aging Peninsula Pastoral Counseling Center | <ul style="list-style-type: none"> Virginia Living Museum Virginia Symphony Orchestra Williamsburg Area Faith in Action Williamsburg Area Meals on Wheels Williamsburg Choral Guild Williamsburg Music Club Young Audiences of Virginia, Inc. |
|--|---|--|

DONOR-ADVISED AND DESIGNATED FUND GRANT RECIPIENTS

These organizations received one or more grants from the Donor-Advised and Designated Funds of the Foundation. These grants are made at the request of WCF donors.

- | | | |
|---|---|--|
| <ul style="list-style-type: none"> 3E Restoration Inc. American Red Cross--Colonial Virginia Chapter Angels of Mercy Inc. Medical Clinic* Avalon: A Center for Women and Children Bacon Street Youth and Family Services Boy Scouts of America Colonial Virginia Council Chamber Music Society of Williamsburg Chesapeake Bay Foundation Child Development Resources City of Hampton* City of Newport News* Clark University CNU Foundation* College of William & Mary Foundation Colonial Behavioral Health Colonial Capital of Williamsburg Kiwanis Foundation Colonial CASA* Colonial Williamsburg Foundation* Covenant Christian School Doctors Without Borders Dream Catchers Therapeutic Riding Center Duke University Environmental Defense Fund First Night of Williamsburg, Inc. FISH Foodbank of Virginia Peninsula, Inc. Grove Christian Outreach Center | <ul style="list-style-type: none"> Hampton Roads Academy Hampton University* Hanover College Trustees Heart for Orphans, Inc. Heritage Humane Society Historic Virginia Land Conservancy Hospice House and Support Care of Williamsburg Housing Partnerships, Inc. Indiana University Foundation International Academy of Hope International Foundation James City County Fire Department James River Association Jamestown Rediscovery Foundation Jamestown-Yorktown Foundation, Inc. Lackey Clinic Literacy for Life Marines Memorial Association Men's Charity Tennis Inc. Muscarella Museum of Art Foundation Olde Towne Medical & Dental Center Open Doors USA Paws for Purple Hearts Peninsula Agency on Aging, Inc. Peninsula Catholic High School Peninsula Pastoral Counseling Center Shriner's Children's Hospital Society of the Alumni College of William & Mary Southern Poverty Law Center | <ul style="list-style-type: none"> Special Olympics of Virginia The Arc of Greater Williamsburg The Nature Conservancy The Williamsburg Symphony Orchestra Thomas Nelson Educational Foundation Tulane University Union Mission United Jewish Community of the Virginia Peninsula, Inc. United Way of Greater Williamsburg University of Mary Washington Foundation Virginia Living Museum Virginia Symphony Orchestra W&M Athletic Educational Foundation Warwick High School WHRO Foundation Williamsburg Area Botanical Gardens Williamsburg Area Faith in Action Williamsburg Area Meals on Wheels Williamsburg Boat Club Williamsburg Choral Guild Williamsburg Landing Williamsburg Parent Cooperative Preschool Williamsburg United Methodist Church WJCC Schools Foundation York County* York County School Division |
|---|---|--|

*Indicates organization received a Designated Fund grant

grantee profile

HOUSING PARTNERSHIPS

Mobility – the freedom to come and go as we please – is something many of us take for granted. It’s hard to imagine being trapped in your own home, but that was the case for one Williamsburg man. A double-amputee, this man lived in a home without a ramp, and was unable to afford to install one. Thanks to a grant from the Williamsburg Community Foundation, Housing Partnerships installed a temporary aluminum ramp at the client’s home. He can now safely get to his doctor’s appointments and participate in the life of the community. Moreover, he can age in place with dignity.

The beauty of these temporary ramps is that they can be installed quickly and at a lower cost than permanent ramps – and they can be re-used again and again. “Ramps are one of the most expensive and labor-intensive projects we do, and we currently have about 12 homes on a waiting list for permanent ramps,” said Abbitt Woodall, Director of Housing Partnerships. When funds become available to install the permanent ramps, the temporary ramps can be removed and reused at another client’s home.

Housing Partnerships uses volunteer labor and local contributions to make emergency home repairs for low-income, sick or disabled homeowners in James City County, City of Williamsburg and York County. They are always in need of volunteers, and were so thankful to have members of the New Zion Baptist Church Men’s Ministry and the Buffalo Boyz Motorcycle Club to install the aluminum ramp funded by WCF’s grant. They had such a good experience volunteering, they are already asking to come back and do it again.

The Housing Partnership ramp is just one example of the many projects supported by the Foundation’s Community Endowment Grants. WCF awards these grants twice a year through a competitive process to local organizations making an impact in five priority areas: children and youth, arts and culture, environment and conservation, senior services, and health and community wellness. Community Endowment Grants are funded by the Foundation’s Community Endowment Fund, and 88 named community endowment funds made possible by generous local individuals and families.

Previous Page: CDR’s Infant & Parent Program received a grant for new assessment tools and specialized therapy equipment to use with infants and toddlers with disabilities or developmental delays and their families. Colonial Behavioral Health received an Altshuler Transportation grant to purchase a vehicle for their PACT team, which works with individuals with serious mental illness to facilitate recovery and prevent recurring hospitalizations or incarcerations. Peninsula Agency on Aging’s Faith in Action helps seniors like Guo-Quo when her son can’t be there to assist with her caregiving. Memory Café allows those with memory loss and their caregivers to come together for conversation and support on a monthly basis.



Above: Volunteers from New Zion Baptist Church men’s ministry and the Buffalo Boyz of Williamsburg helped construct the new aluminum ramp.



Above: Harry and Judy Wason.

donor profile

WASON FUND FOR PUBLIC SAFETY

Harry and Judy Wason have been involved in our community for many years. From the Virginia Living Museum, to the Jamestown Yorktown Foundation, Christopher Newport University, and MCV Massey Cancer Center at VCU, the Wasons have enthusiastically supported a wide variety of causes.

In the summer of 2016, the Wasons had a conversation with a longtime friend that led them to consider making an investment in a completely new area – public safety.

When the Wasons visited Palm Beach County, Florida, and learned about ConnectProtect, a new app the Sheriff's office is using to communicate with the public, they decided to help bring the app to the Peninsula. ConnectProtect allows the public to report suspicious activity to law enforcement through their smartphones; similarly, law enforcement can send notifications to the public about potential safety threats in their area, based on the person's geolocation or neighborhood. ConnectProtect technology makes it much easier for citizens to "see something, say something." The app maker, Shield Group Technologies, has also developed other apps to facilitate information sharing between agents in the field.

Last fall, Harry and Judy established the Wason Fund for Public Safety at the Williamsburg Community Foundation. They worked with director Nancy Sullivan to craft an agreement for a designated fund that not only provided tax advantages but also directed the funds to the organizations that could best implement the program – local police departments.

"We are really excited to work with the Foundation on this," said Judy. "I think it will have a great impact throughout the Peninsula, in a way that the Foundation has never had before."

The Wason Fund enables law enforcement and campus police on the Peninsula to use ConnectProtect to keep residents safe; this includes the Newport News Sheriff's Office, York County Sheriff's Office, the City of Hampton Police Department, Hampton University Campus Police and Christopher Newport University Campus Police.

"The Wason Fund for Public Safety is a perfect example of WCF's mission: connecting people who care with causes that matter" noted Paul Gerhardt, chairman of the Foundation's Board of Trustees. "We are so glad the Wasons came to us with this idea. Because of their generosity, individuals and families throughout the peninsula – and those who protect them – have access to efficient technology to make our communities safer."

chairman's circle 2016-2017

The Chairman's Circle honors individuals and businesses that have made contributions totaling \$1,000 or more to the Foundation's three priority areas, which include Endowment, Annual Fund, and Scholarship Funds. For more information on how you can participate in the Chairman's Circle, call 757-259-1660 or email NCSullivan@WilliamsburgCommunityFoundation.org.

<p>Champion (\$10,000 +)</p> <p>Mr. and Mrs. John Curtis Jr.* Howell Creative Group+ Estate of John Jamison* JBH Fund Mr. and Mrs. Ronald Lodzieski* Ms. Mary Anne Miller Mr. and Mrs. Craig Stambaugh* Mr. and Mrs. William Wilhelm</p> <p>Benefactor (\$7,500+)</p> <p>Sandy and Rick Nahm Williamsburg Winery+</p> <p>Supporter (\$5,000+)</p> <p>Auto Haus of Williamsburg Susan Britcher and Jane deSolms Linda and Tim Caviness* Donald E. and Janet W. Craig* Ellin and Baron Gordon Monarch Bank Margaret Beck Pritchard Gale and Bill Roberts Mr. and Mrs. Marc Sharp* Mr. and Mrs. F. Roger Thaler* Mrs. Millie West* Williamsburg Landing</p> <p>Partner (\$2,500+)</p> <p>Anonymous Roy Hock College of William & Mary Colonial Williamsburg Foundation*</p>	<p>Creative Cuisines+ Mrs. Dorothy Haramis June S. Hennage Kathy and Bruce Hornsby* Mr. and Mrs. Robert Jackson Mr. Kendall Kerby and Mr. Kent Harrell* Kathy and Fritz Klausner Mr. Eric McDonald Proximo Marketing Strategies+ Riverside Doctors Hospital Williamsburg Mr. and Mrs. Robert Taylor Mr. and Mrs. Forrest Williamson*</p> <p>Associate (\$1,000+)</p> <p>Anonymous* Mr. and Mrs. Joseph Agee Mr. and Mrs. James Allburn Mrs. Betsy Anderson Mr. and Mrs. Donald Baker* Robert G. and Hope D. Beck* Ms. Jane B. Beck Berkeley Realty Property Management Mr. Howard Bierenbaum Ms. Kathryn J. Blue Henry S. Branscome, LLC Jan Brown Mrs. Virnell Bruce Douglas W. and Doris E. Bryant Colin and Nancy Campbell Diane and Ian Carr Chesapeake Bank</p>	<p>Colonial Capital Williamsburg Kiwanis Foundation Lori Conen Covenant Wealth Advisors/ Topping Family Charles and Keith Dubois Mrs. Lucinda Dudley Mr. and Mrs. Thomas Durbin Mr. and Mrs. Ken Freeman Friends of Green Spring Mr. and Mrs. Charles Garland Mr. and Mrs. Vernon Geddy III* Mr. and Mrs. Paul Gerhardt Stephen Goodwin Loretta J. Hannum Stephen D. and Marjorie W. Harris Heidi Hawkins Mr. and Mrs. Robert Hershberger Dr. and Mrs. Mark Hinders Mrs. Mary Humelsine* Ironhorse Fund James Blair H.S. Alumni Association Mr. and Mrs. Dan Joss Mr. and Mrs. Robert Kiley* Mrs. Denise Koch Glenn and Bonnie Krochmal Dr. and Mrs. Scott Kruger Lafayette High School PTSA Betty Lewis* Mr. and Mrs. Albert Louer* Mr. and Mrs. Montgomery Mason* Carolyn and Mike McNamara</p>	<p>Middleburg Bank Mr. and Mrs. Mark Monroe Middle Peninsula Insurance Agency, Inc. Mr. and Mrs. Duryea Morton Jim Mundy Mr. and Mrs. Sterling Nichols* John and Nancy O'Hare Oleta Coach Lines, Inc. Meredith and Joe Poole III Mr. and Mrs. Thomas Power Mr. and Mrs. Robert Rathert* Mr. Michael Little and Ms. Devon Rawson Mr. and Mrs. Taylor Reveley Mr. Dean Sartain Dr. Roger Schultz and Dr. Beth Scharlop Sentara Williamsburg Regional Medical Center Mr. Robert Yeomans and Ms. Kate Slevin, Ph.D. Mr. Andreas Stathopoulos and Ms. Evgenia Smirni C.B. Talbot Tony and Gail Taylor Dr. Terry! Times TowneBank* Mr. and Mrs. James Ukrop* Warhill High School PTSA Dr. and Mrs. Peter Wendell Dr. and Mrs. Charles Wolfe Mr. and Mrs. Alfred Woods</p>
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*Ten Year Club Members. In the Foundation's 17-year history, the members of this group have contributed to WCF 10 or more of those years.

+ In-Kind

Many other gifts were contributed to the Foundation's Donor-Advised Funds and other funds that are passed through the Foundation to deserving recipients. Those gifts are not listed in the annual report. Gifts on this list were made between 2/1/16 to 1/31/17.

donors 2016-2017

Donors below have also contributed to the Foundation's priority areas which include Endowment, Annual Fund, and Scholarship Funds.

Contributor (\$500+)

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*Ten Year Club Members. In the Foundation's 17-year history, the members of this group have contributed to WCF 10 or more of those years

+ In-Kind

Gifts on this list were made between 2/1/16 to 1/31/17.

honorary and memorial gifts 2016-2017

In memory of Joann Bierenbaum

Dr. and Mrs. Kenneth Adams

James and Susan Axtell

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Mr. and Mrs. Jack Carey

Dr. Mary Kay Dineen and Dr.

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Mr. and Mrs. John O'Hare

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Henry S. Branscome, LLC

In honor of Linda and Tim Caviness

Anonymous

In memory of Frank Davis

Andreas Stathopoulos and

Evgenia Smirni

In honor of Jane de Solms and Susan Britcher

Robert Britcher and Pat D'Orazio

In honor of Sister Berenice Eltz

Mr. and Mrs. Thomas Landvogt

In memory of Barbara Flynn

Dr. and Mrs. Mark Hinders

In memory of William R. Foley

Mr. and Mrs. Lyman Hall

In memory of Ray Freed

Mr. and Mrs. Robert Freed

Mr. and Mrs. Lyman Hall

Sarah and Wright (Chips)

Houghland

James Blair H.S. Alumni Association

Ms. Kristin Mullaney

Mary H. Norment

Mr. and Mrs. Richard Sherman

In memory of Bruce K. and Joan H. Goodwin

Nancy and Bob Archibald

Mrs. Diane Gohsman

Estate of Bruce K. and Joan H.

Goodwin

Mr. and Mrs. Charles Hobson

Dr. Mike Levine and Dr. Elizabeth

Allison

Mr. and Mrs. Stephen Sanders

In honor of the Harward and Osborn Families

Ms. Meredith Harward

In honor of Mary Jo Hill, M.D.

Mr. David Scherer and Ms. Elise

Emanuel

In honor of Mrs. Rose Karam

Mr. and Mrs. Robert Beck

In honor of Kendall Kerby

Mrs. Bruce Boehm

In memory of Charles K. Koch Jr.

Mr. and Mrs. Charles Hobson

In memory of LTC Stuart A. MacKenzie

Mr. and Mrs. Paul Dresser Jr.

Mr. and Mrs. Michael Iovino

Ms. Anne MacKenzie Kotraba

Mrs. Barbara MacKenzie

Mr. and Mrs. Douglas MacKenzie

Mr. and Mrs. Nicholas A. Vrettos

In honor of Mike Maddocks

Bob and Robin Bledsoe

In memory of Clara Mayfield

Mr. and Mrs. George Watson III

In memory of Helen and Trist McConnell

T. Bringier and Sally McConnell

In honor of Elizabeth Melton

Mr. and Mrs. Alan Melton

In memory of Timothy Moran

Mr. and Mrs. Phillip Dorn

Mrs. Barbara MacKenzie

In memory of Maggie Moyler

Dr. and Mrs. John McCarthy

In memory of Nicholas Paszkwicz

Mr. and Mrs. Steven Sonders

Mr. and Mrs. Michael Suttle

In honor of Margaret Beck Pritchard

Mr. and Mrs. Forrest Williamson

In memory of Charles and Heather Rawson

Mr. and Mrs. Frank Foster

Mr. Michael Little and Ms. Devon

Rawson

In honor of Beth Rilee-Kelly

Mr. and Mrs. Gilbert Granger

In memory of Rose P. Rose

Mr. and Mrs. Benjamin Block

Mr. and Mrs. Clinton Brooks

Mr. and Mrs. Morton Eckhouse

Mr. and Mrs. Alan Fuchs

Mr. and Mrs. Daniel Fuchs

Dr. and Mrs. Joseph Heyman

Mr. and Mrs. George Rublein

Mr. and Mrs. Leon Salzman

Mr. and Mrs. George Watson III

In memory of Andrea Sartain

John and Sharon Sander

Mr. Dean Sartain

Mr. and Mrs. Barry Trott

In honor of Mrs. Jim Shaw

Mr. and Mrs. Robert Beck

In honor of Patricia Suttle

Ms. Jessie Amory Suttle

In memory of Trevor J. Times

Mr. and Mrs. Thomas Durbin

Mr. James Goggin Jr. and Ms.

Deborah Boykin

Dr. Terryl Times

Dr. Virginia Wells

Mrs. Millie West

In memory of John D. Walker

Mr. Art Walker

In memory of Bette Williams

Mr. and Mrs. Robert Gadkowski

Mr. and Mrs. Gene Griffin

Ms. Loretta Lynch

The Honorable and Mrs. Samuel

Powell

Mr. and Mrs. David Shepard

Mr. and Mrs. Lawrence Walk

Mr. and Mrs. A. L. Wilding

Mr. Stuart Williams

In honor of Mr. and Mrs. Forrest Williamson

Anonymous

In memory of Ann and James Yankovich

Loretta J. Hannum

Kathy and Bruce Hornsby

Sarah and Wright (Chips)

Houghland

Mr. and Mrs. Will Hummel

Mrs. Maynard Randolph

Quinn Sale and Roy Champion

Mrs. Millie West



Above: Members of the O'Hare family at the 2015 8k race.

donor profile

THE KARENE O'HARE OVARIAN CANCER MEMORIAL ENDOWMENT FUND

When Karene O'Hare lost her life to ovarian cancer in 2008, her family came together and decided to put together a run/walk to honor her memory and passion for helping others.

Since 2009, the annual Hare and Tortoise 8K has raised \$135,000 to support ovarian cancer screening and treatment for low-income women through Lackey Free Clinic and Olde Towne Medical and Dental Center. Then John O'Hare and his family brought together friends from near and far in support of the race, many of whom have done so in honor of a loved one affected by ovarian cancer.

"Unlike some other cancers, it seems that not many people know as much about ovarian cancer," John said. "Many times, people don't get diagnosed until later stages, when it may be too late. So with the run, we wanted to help educate people about the symptoms and get more local women screened."

After putting together a race for eight years, the O'Hare family began to think about the future.

"We know we may not be able to put on the race forever, and we ultimately wanted to do something that would have a more long-term impact. So we decided to set up the Karene O'Hare Ovarian Cancer Memorial Endowment with the Community Foundation," John said. "The advantage of working with the Williamsburg Community Foundation is that it's an organization that I know will be there for the long-term, and will help me get to my objective in a much easier way."

Funds from the race will go toward the endowment, which will continue to support ovarian cancer screening and education for local women. This means a lot for women like the 22-year-old patient at Olde Towne whose mother had both ovarian and breast cancer. She received genetic testing (normally a very expensive process), thanks to the O'Hare Fund. Similarly, physicians at Lackey Clinic have already been able to catch the cancer early in a few of their patients.

"We had a woman this past fall who had survived ovarian cancer but presented with symptoms again when she came to us, and we were able to get her a CT scan in less than two weeks," said Carol Sale, director of Lackey Clinic. "In her case, thankfully it was not cancer again – but I'm so glad we were able to give her that peace of mind so quickly."



Legacy society

Members of the Legacy Society (pictured above), have committed to supporting the Foundation through their estate plan, retirement account or life insurance policy. An estate gift may be used to establish a named fund or be added to any fund at the Foundation. These future gifts will play a critical role in further strengthening this community for generations to come.

Mary Bates

Mr. and Mrs. Joe Burkart

Mr. and Mrs. John Curtis Jr.

Marian Dawson

Mr. and Mrs. Richard Dawson

Ironhorse Foundation

Martha Hamilton-Phillips

Daniel S. Jones

Mr. and Mrs. Robert King

Mr. and Mrs. Ed Lafferty

Mr. and Mrs. Jack W. Lee

Albert Louer

Eric McDonald

Sandy and Rick Nahm

Mr. and Mrs. James Perisie

Margaret Beck Pritchard

Gwendolyn Sawyer

Dr. Roger Schultz and Dr. Beth Scharlop

Carol Wallace Sherman

Mr. and Mrs. James Spence

Craig and Shirley Stambaugh

Bill and Nancy Sullivan

Mr. and Mrs. Harry Wason

Millie West

Mr. Michael Westfall

Mr. and Mrs. William Wilhelm

Margaret Evelyn Wilkins

Remembered:

Benjamin R. Altshuler

David Dawson

John C. Jamison

Ingrid Jones

cumulative giving

The Foundation would like to recognize those individuals and organizations that have given consistently to and through the Foundation through our history. Donors are listed below based on their total gifts to the Foundation over its 17-year history, from 1999 through January 31, 2017.

\$500,000 +

The Benjamin R. Altshuler Memorial Fund Supporting Amateur Sports and Public Transportation
Anonymous (2)

Bobby and Hope Beck

Ironhorse Foundation

John & Carol Jamison

The Donald A. Perry Foundation

Mr. Philip Richardson

\$250,000 - \$499,999

Anonymous (2)

Dr. & Mrs. Hal Mathews

Bob & Judy Rathert Family Fund

\$100,000 - \$249,999

Anonymous

Mr. & Mrs. Donald S. Baker

John & Julia Curtis

Bob & Lynne Kiley

Beth Scharlop & Roger E. Schultz

Wilma & Marc Sharp

Shirley & Craig Stambaugh

Mildred B. West Family

William C. and Elizabeth J. Wilhelm

\$50,000 - \$99,999

Anonymous (5)

The Corson Family

Joseph D. Harrow & Bill Morrison

Dr. & Mrs. Thomas Jamison

Scott & Beth Stabler

Paul & Bonita Stockmeyer

Rob & Jill Swain

Jane & Bob Taylor

Harry and Judy Wason

Williamsburg Health Foundation

\$25,000 - \$49,999

Anonymous (4)

Auxiliary of Sentara Williamsburg Regional Medical Center

Mr. & Mrs. Robert C. Condon

Donald E. & Janet W. Craig

The Crone Family

Michael & Sally Derrig, Derrig Family Fund

Kathy & Bruce Hornsby

Lee and Paula Hougen

Ellin & Baron Gordon

Gil & Connie Granger

Harris Family & LaTienda.com

Stephanie & Bob King

Matthew McMillan

Kerry & Peter Mellette

Men's Charity Tennis, Inc.

An Occasion for the Arts

Margaret Beck Pritchard

Rob & Diane Topping / Covenant Wealth Advisors

SunTrust Bank Foundation

David Dawson 1938-2017

I first met David Dawson in 2006. Dave was a soft-spoken gentleman whose quiet façade almost, but not quite, hid his compassion and zeal for championing those without a voice. He did not want to be recognized or to serve on the board of the organizations that he supported. Rather he would spend hours consulting with staff using his financial and fundraising expertise where he felt he could make the most impact, as a mentor and friend.

I eventually persuaded Dave to serve on the Foundation's Finance and Investment Committee where WCF benefited from his solid counsel for several years. However, where Dave (always with Marian, his wife and partner by his side) has made a significant impact is through his Donor-Advised Fund at WCF. When we share information about grant applicants with our donor-advisors, Dave and Marian have always been first in line to see which applications would suit their interests. When a new program excited Dave, he would enthusiastically take it on as a project to make sure it got off to a good start. The Arc was his special focus. He invested in the organization to sustain its work with special needs adults in Williamsburg.

Dave and Marian became members of WCF's Legacy Society so that the organizations they have supported during their lifetime will continue to receive support in the future through a fund at the Foundation. Many of us who work in the social sector in greater Williamsburg miss Dave's kindness, wisdom and always-cheerful presence.

- Nancy C. Sullivan



donor-advised funds

Benjamin R. Altschuler Memorial Fund
 Laurie and John Andrews Family Fund
 Beck Family Advised Fund
 Jane B. Beck Advised Fund
 Charles and Ginny Crone Family Fund
 Dave and Marian Dawson Fund
 Derrig Family Trust Fund
 Gasink Family Fund*
 Lee and Paula Hougen Fund*
 Ironhorse Foundation
 JBH Fund
 The Jamison Fund
 John and Carol Jamison Family Advised Fund
 La Tienda Fund
 Nancy and Hal Mathews Family Fund
 Mellette Family Fund
 MidPen Foundation Fund
 Joe & Linda Montgomery Family Fund

Michael L. Norton Fund
 Margaret Beck Pritchard Advised Fund
 Bob and Judy Rathert Family Fund
 Philip O. Richardson Family Fund
 Beth Sharlop and Roger E. Schultz Gift Fund
 Sharp Family Fund
 Len and Faith Shartzter Family Fund
 Martha and Thomas Squire Fund
 Stabler Family Fund
 Paul and Bonita Stockmeyer Gift Fund
 Catherine and Rex Swetnam Advised Fund
 Roger and Imogene Thaler Family Fund
 Ukrop's Endowment Fund
 Mike and Amy Watson Fund
 Millie and Marvin West Fund
 William C. and Elizabeth J. Wilhelm Advised Fund
 Alfred L. and Diane Woods Charitable Fund



designated, agency and scholarship funds

Avalon Endowment Fund
 Mary Bates Fund for Heritage Humane Society
 Julia Everts and Mark Greenawalt Scholarship Fund
 Emma McMillan Scholarship
 Karene O'Hare Ovarian Cancer Memorial Fund
 Donald A. Perry Scholarship Fund
 Peter and the Wolf Fund
 Parke S. Rouse, Jr. Memorial Fund

Sister Berenice Endowment for Angels of Mercy Fund
 Swain Family Fund
 This Century Art Gallery Fund
 John D. Walker Memorial Fund
 Wason Fund for Public Safety*
 William and Elizabeth Wilhelm Scholarship Fund
 WJCC Scholarship Fund
 WJCC Scholarship Endowment Fund

*New Fund in 2016



WILLIAMSBURG-JAMES CITY COUNTY
Scholarship Fund
 WILLIAMSBURG COMMUNITY FOUNDATION, INC.

The WJCC Scholarship Fund is a community-wide effort to provide scholarships for students graduating from Jamestown, Lafayette, and Warhill High Schools. Established in 1974 as the Lafayette Education Fund, the WJCC Scholarship Fund awarded 46 scholarships valued at \$55,925 in 2016. Funds raised to support scholarship come from individuals, families, high school parent-teacher associations, civic groups and local businesses.

To view the complete list of scholarships, please visit WilliamsburgCommunityFoundation.org.



From Top: Pam Rambo and Colonial Capital Kiwanis scholarship recipient Ayoub Baaddi. Jim Joseph with his daughter Lynn Joseph. WCF trustees Ron Ludzieski and Linda Caviness. Bernie Ngo and Michele Orabona with recipients of the Monarch Bank scholarships, Jake Clark and Tim Felbinger. WCF past trustee Mark Monroe and his wife Maura.

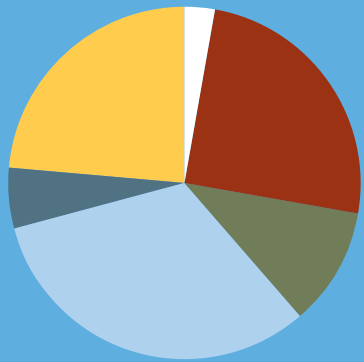


condensed financial information

FOR THE YEAR ENDED JANUARY 31, 2017

Beginning Net Assets	\$5,541,947
Contributed Support	1,003,620
Investment Income	643,445
Total Income	1,647,065
Program Expenses <i>(includes Grants & Scholarships)</i>	(684,414)
Other Expenses	(278,200)
Total Expenses	(962,614)
Change in Net Assets	684,451
Ending Net Assets	\$6,226,398

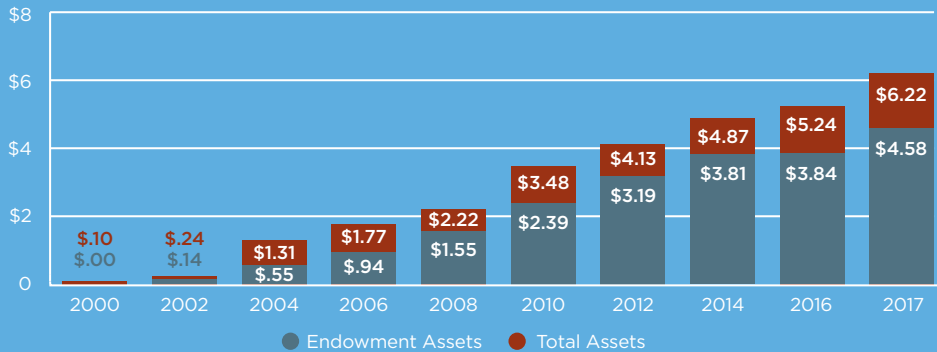
Audited financial statements are prepared annually by Dixon Hughes Goodman, LLP and are available by request at the WCF office. The WCF fiscal year runs from February 1 to January 31.



Grants by Type of Fund

● Arts & Culture	\$19,647
● Children & Young Adults	\$168,246
● Environment & Conservation	\$73,229
● Health & Community Wellness	\$219,335
● Senior Services	\$37,274
● Scholarship	\$157,925
Total	\$675,655

WCF Assets Since Inception (in Millions)



From Top: Literacy for Life received a grant to train tutors in the Barton Reading and Spelling System, specially designed to help those with dyslexia learn to read. Officers of the Arc's Aktion Club, which partners with the local Kiwanis to work on charitable community projects. Steve Munday of Creative Cuisines with WCF Vice Chair Kendall Kerby. Mary Turnbull with AutoHaus's Jack Anderson.



Williamsburg
**COMMUNITY
FOUNDATION**

**CONNECTING PEOPLE
WHO CARE WITH CAUSES
THAT MATTER...FOREVER.**

757-259-1660

1323 Jamestown Road, Suite 103
Williamsburg, VA 23185

WilliamsburgCommunityFoundation.org



The Greater Williamsburg Community Trust (DBA Williamsburg Community Foundation) is a tax exempt public charity under section 501(c)(3) of the IRS code.

From top: Peninsula Catholic High School Wrestling Team - The Benjamin Altshuler Fund for Amateur Sports helped PCS purchase a new mat for their wrestling team. Volunteers from Hospice House received training to provide 24/7 vigil to those nearing life's end. WCF funding will support this pilot program at an 18-bed medical oncology unit at Sentara Williamsburg Regional Medical Center. The visiting canines program at Faith in Action was supported by a donor-advised grant at the Foundation.