2018 Report to the Community
River Counties Community Foundation
Serving donors and nonprofits in Lancaster, Middlesex and Northumberland counties of Virginia since 1996

Working Together for Greater Impact

River Counties Community Foundation (RCCF) is proud to be affiliated with the Community Foundation for a greater Richmond, who is celebrating its 50th year of expanding philanthropy in the region. The Community Foundation has a reputation for strong leadership and trusted stewardship of philanthropic resources.

While ultimately governed by the Board of the Community Foundation, RCCF’s local Advisory Board is entrusted with knowing how best to meet needs and grow potential in our community. The Foundation’s Richmond staff – professionals in donor services, grantmaking, and finance – work hand-in-hand with our local staff to provide donors and nonprofit agencies excellent service and resources. This 22-year partnership has helped to amplify the work of RCCF and maximize our impact in serving our neighbors. The affiliate structure also gives RCCF access to top-tier endowment managers.

This relationship between RCCF and the Community Foundation has proven to be mutually beneficial. Although approaches to solutions on common issues may vary in our respective communities, we continue to learn from each other. There is never any doubt that, Together, we do more good.
One of River Counties' first bequest donors, Catherine "Treenie" Chilton, believed in giving back to the community she first became a part of in 1937 as a new teacher in Lancaster County schools. Treenie became very interested in the rich history of the Northern Neck and cared deeply about historical preservation. She and her husband Ran, who died in 1973, were also passionate about land conservation. The Northern Neck’s only state forest, “Chilton Woods” exists because of their foresight.

Working with her attorney, Treenie planned her charitable legacy carefully. She created a fund agreement with RCCF, updating it several times over the years to reflect new interests and changing priorities. Upon Treenie’s death in 2006, distributions received from her estate funded the Catherine B. Chilton Endowment Fund, and RCCF began the perpetual stewardship of her charitable wishes.

After RCCF made one-time distributions to Treenie and Ran’s alma maters, Randolph-Macon Woman’s College and Virginia Military Institute, as directed in the fund agreement, the remaining assets were endowed. The Fund was designed to support local charities which Treenie cared about, such as Mary Ball Washington Museum and Library. However, Treenie knew, over time, changes would come to her community, so she gave flexibility to the Advisory Board of RCCF to make grants to nonprofit organizations not specifically named in the agreement.

Today, the Catherine B. Chilton Endowment Fund is one of the largest component funds held by RCCF. With wise investing, RCCF has granted out more than 100% of the initial endowment’s value while growing a fund that is valued today at 125% of the initial gift. Treenie understood the power of philanthropy and the power of endowment, and together with RCCF, her legacy will forever be a part of our community.
With each passing year, River Counties Community Foundation (CCF) has reported on the continued progress of your hometown community foundation. In 2018, our successful growth expanded with the total number of funds exceeding 100 and fund assets reaching $17,000,000. This represents a 30% increase in assets over the last 12 months!

RCCF’s success is more than a number. Growing assets make additional monies available to invest in successful nonprofits of all types. Our competitive grants program awarded $544,000 this past spring, up from $500,000 the previous year. The growing number of component funds reflects increased participation by neighbors seeking to leave a philanthropic legacy. Our progress reflects favorably upon RCCF’s affiliated status with the Community Foundation for a greater Richmond, which provides valuable support to RCCF.

Together. Stronger., our annual fundraising campaign, has also grown each year. This initiative provides unrestricted funds to support unmet needs. Many in the community are finding it a good way to participate in giving locally without necessarily knowing a specific nonprofit to support. Knowing the needs of the local nonprofits and the priorities is our job – 24/7. And as you may guess, needs always exceed our resources. Thank you for your support.

We thank Debbie Newman and Ronald Mihills for more than nine years of Board service. We also recognize Martha Heric and David Cryer for their service on the Board. Each of these individuals embodied our mission and served with great energy. We thank them for their years of dedicated leadership and contributions to the community. We welcome Jerry Suyes and Wayne Jessie, Sr., both of Middlesex County, who recently were elected to the Board.

The success of our efforts to meet the needs of this community requires the hard work and dedication of many nonprofit entities. Nowhere is their work more important than in the three rural counties which RCCF serves. We salute their efforts and thank them for their steadfastness.

We hope that our story highlighted in the following pages of this report may cause you to want to learn more about what we do. Please visit our office at 46 S. Main Street, Kilmarnock, or our website RiverCountiesCF.org or call Margaret Nost at 804-436-1600.

The mission of River Counties Community Foundation (RCCF) is to inspire local philanthropy by:

- Connecting people who care with causes that matter
- Providing superior stewardship for our donors
- Creating a better quality of life ... forever.
RIVER COUNTIES COMMUNITY FOUNDATION
2018 ADVISORY BOARD

Carolyn Norton Schmalenberger – Treasurer, Mason Brent, Mary Kay Rotert – Vice Chairman, Debbie Newman, Wayne Jessie, Carlton Revere, Bill Vose – Chairman, Jerry Suyes, Peggy Lassanske, Brownie Watkins – Secretary, Elizabeth Hurd, Stuart Kramer, Ronald Mihills with ball players Addie George and Jamarius Monroe

Not pictured: Elizabeth Hinton Crowther, Don Phillips

River Counties Community Foundation supports Dream Fields … RAIN or SHINE!
UNRESTRICTED FUNDS
These funds support unrestricted needs as advised by the RCCF Advisory Board. Unrestricted funds give RCCF the flexibility to address unexpected and unforeseen needs in the community.
Fuzz and Peggie James Charitable Fund (2007)
Donald W. and Doris B. Lynch Fund (1999)
Pim Montgomery Charitable Fund (2014)
Dewey and Vivian Stallard Charitable Fund (1997)

DESIGNATED FUNDS
Designated Funds specify one or more charitable organizations to receive ongoing support. Should the designated charity cease to operate or change its charitable focus, RCCF will ensure the fund continues to support the donor’s original charitable intent.
Church Resource Services Community Fund (2009)
Supports designated charities and unrestricted needs in the area served by RCCF.
Catherine B. Chilton Endowment Fund (2000)
Supports designated charities and unrestricted needs in the area served by RCCF.
Nettie Mooring Gordon Fund (2009)
Supports designated charities and unrestricted needs in the area served by RCCF.
Beverly and John-Michael King Charitable Fund (2008)
Supports designated charities.
Donald W. and Doris B. Lynch Endowment Fund (2007)
Supports designated charities.
Supports the Northern Neck Free Health Clinic.
Mary Catherine Rotert Fund (2017)
Supports the education of nursing students and medical care for the underserved.
Don and Suzanne Scheu Fund (2016)
Supports summer programs at the Boys & Girls Club of the Northern Neck.
Supports designated charities.
Williams and Sally Spotswood Fund (2001)
Supports designated charities and unrestricted needs in the area served by RCCF.
Supports designated charities in Northumberland County.

RCCF COMPONENT FUNDS

Straughan Family Charitable Fund (2002)
Supports Rice’s Hotel/Hughlett’s Tavern Endowment Fund.
Weaver Family Charitable Fund (2006)
Supports designated charities and unrestricted needs in the area served by

DONOR ADVISED FUNDS
Donor Advised Funds allow donors and their families to actively participate in the grantmaking from the fund. Donors recommend specific grants, and RCCF provides due diligence and administrative support. Grants can be given anonymously if the donor chooses.
Hug Family Fund (2012)
Marion and Leland James Fund (2002)
Kiser Family Charitable Fund (2007)
Moran Charitable Fund (2008)
Ken and Linda Owens Fund (2015)
Ratcliffe Family Charitable Fund (2006)
Lloyd and Margie Redlin Fund (2017)
Suyes Family Endowment Fund (2018)
UUFR Servitus Endowment Fund (2018)
Watkins Family Advised Fund (2011)

AGENCY FUNDS
Agency Funds are established by nonprofit organizations as endowments to generate income to support their programs. These funds increase the stability and self-sufficiency of the agency. Should the agency close, the endowment remains with RCCF to support similar needs in the community.
Boys & Girls Club of the Northern Neck Endowment Fund (2015)
Dream Fields Endowment Fund (2014)
RHHT Endowment Fund II (2010)
BEQUEST FUNDS
Bequest Funds are established to receive a portion or all of a donor's estate. The Fund agreements can be easily revised during the donor’s lifetime to reflect changes in charitable priorities without having to change estate documents.

Anonymous (14)
Hank and Seale George Fund (2007)
Jean and Garland Hagen Endowment Fund (2010)
Jean and Jack Hogan Foundation Fund (2014)
Hoinkes Charitable Endowment Fund (2011)
Joy and Stuart Kramer Endowment Fund (2017)
Dr. Russell O. and Antoinette M. Lewis Scholarship Fund (2017)
Mama Kat Fund (2017)
Mason Fund (2006)
H. Dickson and Susan T. McKenna Fund (2013)
Page and Rebekah Melton Charitable Fund (2016)
Pim Montgomery Fund for the Northern Neck Family YMCA (2014)
Darlene Krevonick-Pearson Fund (2016)
Mary Catherine Rotert Fund (2017)
Wendell and Gloria Wallace Fund (2008)
Watkins Family Endowment (2011)
Peter G. and Tillie M. Weil Charitable Fund (2011)
Harry W. Wells, Jr Charitable Fund (2007)

COMMUNITY FOUNDATION FOR A GREATER RICHMOND
COMPONENT FUNDS
Supporting RCCF’s Competitive Grants Program

Martha Henna Harris Endowment Fund
Supports unrestricted needs with preference for programs creating economic security and independence in the greater Richmond area and Middlesex County.

Frances R. Parker Fund
Supports designated charities and organizations that provide emergency services, meet basic human needs, or interpret history and local culture in Middlesex County.

The River Counties Community Foundation Legacy Society was created to recognize donors who have made a planned gift or included RCCF in their wills, trusts or estate. The Legacy Society currently has 56 members. To say “thank you,” the Foundation hosted the inaugural Legacy Society Luncheon in mid-May. Members were recognized as strategic leaders, ambassadors and community role-models for their inspired philanthropy.

Legacy Society donors may gift a portion or all of their estate and can easily revise the fund agreement during their lifetime to reflect charitable priorities. Through the power of endowment, these gifts assure the Foundation’s ability to fulfill its mission of making our community a better place for current and future generations.

To find out how easy it is to become a Legacy Society member, please contact Margaret Nost, Regional Director at (804) 436-1600 or mnost@cfrichmond.org.

Current members of the River Counties Legacy Society include:

Anonymous (15)
Mr. & Mrs. H. W. Anderson
Mr. & Mrs. Philip Q. Booth
Mr. & Mrs. William G. Ehlman
Mr. & Mrs. Henry J. George
Mr. & Mrs. Thomas A. Gosse
Mr. & Mrs. C. Garland Hagen
Mr. & Mrs. R. Page Henley, Jr.
Mr.* & Mrs. Laurance H. Higgins
Mr. & Mrs. Jack L. Hogan
Mr. & Mrs. H. Dieter Hoinkes
Mr. & Mrs. Leland T. James
Mr. Stuart W. Kramer
Mr. & Mrs. Paul W. Lassanske
Dr. Russell O. Lewis
Mr.* & Mrs.* Donald W. Lynch
Mr. Ross Fortune Mainor, Jr.*
Mr.* & Mrs. H. Dickson McKenna
Mrs. Rebekah P. Melton
Mrs. Pauline B. Montgomery
Mr. William C. Pearson
Mrs. Mary Catherine Rotert
Mrs. Gloria S. Wallace
Mr. & Mrs. Thomas M. Watkins III
Mr. Peter G. Weil
Mr. Harry W. Wells, Jr.
*Deceased

Together, we do more good.
FIELD OF INTEREST FUNDS
These funds support one or more charitable areas or issues affecting the community, such as arts and culture, education, poverty and environmental issues. RCCF will identify organizations working in those areas to receive funding.

Pirkko Lauslahti Graves Fund (2015)
To support programs for children from difficult socio-economic conditions in the areas of health and development from prenatal through pre-kindergarten, post-secondary education, and local creative arts.

River Counties Youth Fund (2008)
To bolster morality, good citizenship, strength of character, family values, work ethic, entrepreneurship and educational achievement in the under-19 youth of Lancaster and Northumberland counties, especially, but not exclusively, those youth who can be considered “at risk”.

Northern Neck Wild Turkey Association (2017)
To support wildlife management, conservation, environmental education and/or related activities in Lancaster and Northumberland counties.

SCHOLARSHIP FUNDS
Scholarship Funds support educational expenses for students. RCCF works with the donor to establish guidelines, administers the application process, and makes awards to academic institutions on behalf of the recipients.

In 2018, $26,500 was awarded in scholarships to the following students in the Northern Neck and Middle Peninsula:

Fr. John D. Boddie Memorial Scholarship Fund (2009)
Established by the Church of the Visitation in Middlesex County for scholarships to qualifying high school graduates.

Anna Moore, Middlesex

Alice Haynie Dameron Scholarship Fund (2004)
Established by Alice Dameron to support post-secondary scholarships for qualifying high school graduates residing in Northumberland County.

Denzel Mitchell, Northumberland

Doris Estreet Scholarship Fund (2001)
Established by Campbell Memorial Presbyterian Church’s Community Mission Program to honor Doris Estreet. Provides post-secondary scholarships for graduates of Lancaster High School.

Erin-Darby McClain, Lancaster

Maria Laquer and Jerry Hamm Scholarship Fund (2008)
Established by Maria Laqueur to support post-secondary educational scholarships for qualifying high school graduates of Lancaster High School.

Lucy Gilbert, Lancaster

Ashleigh Sanford, Lancaster

Grace Lowery Memorial Scholarship Fund (1999)
Established by the Northumberland Elementary School Reading Partners to provide need-based scholarships for qualifying seniors at Northumberland High School.

Abigail Kiss, Northumberland

Northern Neck Rotary Scholarship Fund (2002)
Established by the Rotary Club of the Northern Neck to support post-secondary educational scholarships for qualifying graduates of Lancaster and Northumberland High Schools.

Lucy Gilbert, Lancaster

Jayson Gill, Lancaster

Abigail Kiss, Northumberland

Morgan Wilson, Northumberland

Northumberland Civic Center, Inc. Fund (1999)
Established with a gift of the remaining assets of the former Northumberland Civic Center, Inc. primarily to support post-secondary educational scholarships for qualifying graduates of Northumberland High School.

Christian Headley, Northumberland

Marcia Swann, Northumberland

Established by Don Rice in memory of his parents to support post-secondary educational scholarships for qualifying graduates of Northumberland High School.

Zachary Swift, Northumberland

Casey Neal Rogers Memorial Scholarship Endowment Fund (2006)
Established by the family and friends of Casey Neal Rogers to endow post-secondary scholarships for qualifying high school graduates who are residents of Northumberland County.

Zachary Swift, Northumberland

Morgan Wilson, Northumberland

Rebecca Reid Smiley Scholarship Fund (2014)
Established by Rebecca Smiley to support post-secondary scholarships for qualifying graduates of Lancaster and/or Northumberland High Schools.

Jayson Gill, Lancaster

Dylan Rose (Renewal)

Kelli Tignor (Renewal)
The annual RCCF Competitive Grants reception provided a unique opportunity for RCCF founding Board members, current RCCF Board members, nonprofit leaders, RCCF donors, and local government leaders to share extremely valuable ideas to maximize nonprofit impact in our communities. **Together, we do more good.**
In 2018, River Counties Community Foundation awarded nearly $500,000 in competitive grants. At the core of grantmaking is a set of goals that envisions a community that offers a path to economic prosperity, an opportunity for young people to experience educational success, a commitment to health and wellness, and is renowned for its cultural vibrancy. Competitive grants are awarded to impactful programs and projects working toward these collective goals.

**ECONOMIC PROSPERITY** – The region’s resources are sustainable and its residents are economically stable and secure ($162,090)

Residents access and maintain safe and affordable housing in thriving, sustainable communities.

- Habitat for Humanity of Middlesex
- Hands Across Middlesex Interfaith Outreach
- Lancaster/Northumberland Habitat for Humanity
- Lancaster/Northumberland Interfaith Service Council
- Middlesex Department of Social Services
- The Middlesex Foundation

**EDUCATIONAL SUCCESS** – Young people achieve in school, engage in their community, and are prepared for the workforce ($162,855)

Children begin school ready to learn and are supported academically and socially throughout their educational experience.

- Friends of the Rappahannock
- Great Aspirations Scholarship Program (GRASP)
- Jacob’s Ladder
- Kiwanis Club of Middlesex
- Lancaster County Virginia Education Foundation
- Middlesex County Public Library
- Northern Neck Family YMCA
- Northumberland Family YMCA

Youth become skilled, self-sufficient, and contributing members of the community.

- Boys & Girls Club of the Northern Neck
- Lancaster Community Library
- Macedonia Community Development Corporation (MACorp)
- Middlesex County Public Schools

Library staff member, Arthur Newman, is ready to assist with technology applications on board Northumberland Public Library’s Tech Mobile. This mobile resource expands technology access through free Wi-Fi, computers, printing/copying and technology assistance. In a rural county with limited transportation options, it also provides expanded services and access to library materials for young and old, through reading, educational, and recreational resources.

(Back) Dr. Peter Gretz, Superintendent, Middlesex County Public Schools, and Claudia Soucek, Chair, MCPS School Board, meet with secondary students enrolled in the inaugural class of Compass Academy. The newly implemented alternative pathway to graduation, focusing on deeper learning and engaged community involvement, is led by director (far right seated) Jamie Sears and faculty member Jack Rucker (far right standing). Building innovative programming better prepares ALL students for successful transitions to careers, post-secondary training and education, and positive community contribution.
HEALTH AND WELLNESS – Community members are safe and healthy ($134,200)

Residents access comprehensive and coordinated preventative services and quality health care.

- Ledwith-Lewis Free Clinic
- Northern Neck-Middlesex Free Health Clinic

Residents are connected to resources that meet their health, nutritional, and safety needs.

- Alzheimer’s Association
- Animal Welfare League of the Northern Neck
- Avalon Center
- Fairfields Volunteer Fire Department
- The Haven Shelter & Services
- Healthy Harvest Food Bank
- Middlesex Family YMCA
- Northern Neck Court Appointed Special Advocate (CASA)
- Rappahannock Westminster-Canterbury Foundation
- Smith Point Sea Rescue
- Three Rivers Health District
- Upper Lancaster Volunteer Rescue Squad
- Youth Club of Lancaster County (Dream Fields)

CULTURAL VIBRANCY – Community members have access to and an appreciation for arts and cultural opportunities ($36,900)

Residents are enriched and educated through a diverse offering of arts and cultural activities in their communities and schools.

- The Court House Players
- Northern Neck Orchestra
- Rappahannock Concert Association
- Rappahannock Foundation for the Arts

The region’s historic and cultural assets are supported to enrich current and future generations.

- Foundation for Historic Christ Church
- Rice’s Hotel/Hughlett’s Tavern Foundation
- Steamboat Era Museum

Upper Lancaster Volunteer Rescue Squad’s President Judy Hammell and Captain Alex Symons inspect updated medical equipment for each of the three rescue vehicles. Investments in oxygen bags and compact stretchers allow emergency personnel to have all airway equipment in one location and move patients in a safe and secure manner.

Historic Christ Church & Museum’s Education Director and Curator, Robert Teagle, demonstrates the design of a new hands-on, STEM-based children’s exhibit to Chesapeake Academy students. The interactive model will allow visitors to assemble a King Post Roof Truss, learning how 18th century builders used science, technology, engineering and math to construct Christ Church.
A Corporate Philanthropic Partner

Northern Neck Insurance Company (NNINS) has long believed in the importance of social responsibility and community service, both at the corporate and individual employee levels. Ten years ago, under the leadership of then President and CEO Tom Gosse, the company established an employee-advised endowment with River Counties Community Foundation. Each year, NNINS makes a contribution to the endowment and allows the employees to select a nonprofit in the region which is meaningful to them. RCCF handles investments, due diligence of grantees and distributions of funds on behalf of the NNINS Employee Fund. Current President and CEO Peter Cammarata continues to believe in the effectiveness of this annual process, recognizing the value of the employees’ input and the positive impact to the community.

Together, we do more good.
Responsive and Impact-Driven Grantmaking

River Counties Community Foundation has invested $783,537 during the past twelve months in sustaining and expanding the valued work of nonprofit organizations.

Investment Expertise

Through its affiliation with the Community Foundation for a greater Richmond, RCCF participates in a unique partnership with Spider Management Company LLC, investment manager for the University of Richmond’s endowment. This partnership gives RCCF access to a mature, well-diversified investment portfolio managed by a seasoned staff with an excellent performance record.

The process of building endowment requires commitment, patience and discipline. RCCF’s assets are designed to last forever. We are preserving our donors’ legacies and providing perpetual support for the charitable organizations that serve our community. That is the power of endowment! Together, we do more good.

Total Assets (Millions)

The Power of Endowment

By building the trust of donors and maintaining a disciplined investment strategy, RCCF has doubled its assets every 5 years for the past 15 years while simultaneously granting in excess of $8,300,000 to successful nonprofits!

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<tr>
<th>Year</th>
<th>Total Assets</th>
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<tbody>
<tr>
<td>2003</td>
<td>$0.9M</td>
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<tr>
<td>2008</td>
<td>$4.0M</td>
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<td>2013</td>
<td>$8.5M</td>
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$17.3M

6/30/18
2017-2018 DONORS

Anonymous
Margie Armen
Dr. Robert S. Barlowe
Marguerite Odom Bashore
The Matthew T. Blackwood Foundation Trust
Wayne & Betty Bray
Brent Family Foundation
Betty P. Bristow
Mr. & Mrs. Bryce A. Bugg
Virginia S. Burnette
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Mr. & Mrs. Charles R. Carmichael
Chesapeake Bank
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Northern Neck Rotary Charitable Trust
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Youth Club of Lancaster County
In Memory of FR. John D. Boddie
Jane C. Agnor
Cpt. & Mrs. F. C. Atienza USN, Ret.
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Marianne E. Krop
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Robert P. O’Keefe
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SMSGT & Mrs. Joseph P. Pearce, Ret.
Mr. & Mrs. Jack Petralia
Mr. & Mrs. William R. Puttmann Jr.
Col. & Mrs. William G. Richardson USAF, Ret.
Robert W. Scherrer, OD
Stephanie K. Selmer
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Carol Ann Smith
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David R. Suyes Jr.
Mr. & Mrs. Charles R. Walsh Jr.
Mr. & Mrs. Robert L. Warren
Morgan Wells
In Honor of Bill Vose
Mr. & Mrs. John E. Byers
In Honor of Margaret Nost
Mr. & Mrs. E.C. Tibbs
In Honor of Nancy and Brooks Johnston
Mrs. Marguerite Odom Bashore
Donors through August 30, 2018
Together, we do more good.

Davenport & Company
SINCE 1863

J.B. “Jay” Wallin
Investment Executive
(804) 435-7705

Paul Sciachitano, AAMS*
Managing Director – Investments
(804) 435-1636

Rumsey & Bugg
ATTORNEYS AT LAW

James A. “Alfie” Butts, IV
Trusts & Estates
(804) 438-5588

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An Affiliate of

Community Foundation
for a greater Richmond
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