



# COMMUNITY MATTERS

Newsletter of the Community Foundation of Calhoun County

Vol. 4 Fall 2006

## Spring Grant Awards Total \$300,000

The Board of Trustees expressed its congratulations to the Foundation's Fall 2006 grant recipients at a reception held on October 19<sup>th</sup>. The presentation included \$200,000 in new grant awards from the Stringfellow Health Fund, plus various Donor Advised Funds and renewal grants totaling \$100,000. The following organizations received one- and three-year awards:

### Stringfellow Health Fund

- *Sight Savers of Alabama*: one-year grant to purchase specialized vision equipment for Calhoun County youth with severe vision impairment
- *Walter Wellborn Elementary School*: three-year grant to grade, build and provide a track and play area which had been unusable for nearly 15 years



**Walter Wellborn Elementary School  
Receives Three-Year Grant**

- *Jacksonville Meals-on-Wheels*: three-year grant to provide daily meals for low-income elderly
- *Daybreak Crisis Recovery Center*: mini-grant to develop a website to help the public access information and resources on domestic violence
- *2<sup>nd</sup> Chance, Inc.*: one-year grant to purchase supplies to produce educational outreach materials for workshops and trainings
- *Coosa Valley Youth Services Center*: one-year grant to purchase health educational materials for residents

### Susan Artemis and Connor Jacob Spector Memorial Fund

- *United Way of East Central Alabama*: grant to support monthly book deliveries to low-income families through the Dolly Parton Imagination Library
- *Coosa Valley Youth Services Center*: grant for general operating support
- *Saks Elementary School*: grant to support arts program
- *LINC Program*: grant for general operating support

- *Jacksonville State University Theatre for Young People*: grant to expand access to live theater performances for children

### E.C. Lloyd & J.C.U. Johnson Family Fund

- *Sight Savers Of Alabama*: see previous description
  - *Coosa Valley Youth Services*: see previous description
  - *Daybreak Crisis Recovery Center*: see previous description
  - *Children's Services (Parris Home)*: grant to provide support for long-term resident children
- Jerry & Judy Klug Advised Fund
- *Jacksonville State University Theater for Young People*: see description above
  - *Jacksonville Meals-On-Wheels*: see previous description

### Dr. & Mrs. Arthur Toole, III Advised Fund

- *First Presbyterian Church of Anniston*: grant to provide unrestricted support

### Dr. & Mrs. James Mullis, Jr. Advised Fund

- *Habitat for Humanity*: grant for general operating support
- *Anniston Museum of Natural History*: grant for general operating support
- *East Central Alabama United Cerebral Palsy*: grant for general operating support

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## Grant and Scholarship Application Due Dates

**LETTERS OF PROPOSAL AND MINI-GRANT APPLICATIONS:** Letters of Proposal for healthcare projects up to \$50,000 per year are due May 1, 2007 for the Fall 2007 Grant Awards. Also, healthcare Mini-Grant applications are due by March 1, 2007. These grants cannot exceed \$5,000.00 and support smaller projects or equipment purchases. For more information, contact the Foundation or download the application and guidelines from our website.

**SCHOLARSHIP APPLICATIONS:** Due to the generosity of area residents, the Community Foundation is now accepting scholarship applications. The application and specific guidelines for each scholarship are available from either the guidance counselor's office at each respective school or the Foundation's website. All scholarship applications are due by February 1, 2007 with awards being announced in April of 2007.

## Jacksonville City Schools Endowment Fund

The Board of Trustees for the Jacksonville City Schools Education Trust transferred its investments to the Community Foundation to establish the Jacksonville City Schools Endowment Fund. "The Fund will provide grants to teachers and support academic initiatives; no funds will be used for extracurricular activities," commented **Mr. Koven Brown**, Board President. "The main goal is to create awareness of the many ways residents can directly impact resources for the classroom." In addition, the Board will benefit from the Community Foundation's pooled investments and its services in administering scholarship funds. Currently, Jacksonville High School has very few scholarships

exclusively designated for seniors compared to other are high schools.



Parents, members of the PTO, area residents and alumni can make contributions in any amount in support of the Jacksonville City Schools Endowment Fund at the Community Foundation. Through the Community Foundation, donors may further establish sub-endowments to fund scholarships, memorials, honorariums or other designations to benefit the Jacksonville School System. All

contributions are tax deductible as qualified charitable donations.

## Parker Memorial Baptist Church Endowment Fund

On July 5, 2006, Parker Memorial Baptist Church completed a multi-million dollar renovation project. The two-year project refurbished the 117 year-old main sanctuary and the interior structure from rewiring to adding state-of-the-art technology. With the initial gathering of members at the Anniston Opera House in 1887, and the subsequent building of Twentieth Street Baptist Church in 1891, the congregation has grown, nurtured faith and remained an integral part of the community.



maintenance and the renovations that will be needed in the next 50 years. "The church trustees believe that the best way we can express our gratitude to all the members and our benefactors is to ensure that we plan for major repairs and future renovations," stated **Mr. David Dawson**, Chairman of the Stewardship Committee. With the endorsement of the Board of Deacons and the Finance Committee, the Church's trustees have established a Capital Endowment Fund with the

Community Foundation on behalf of Parker Memorial Baptist Church. Members of the Church, friends and supporters may make gifts in any amount to the Fund.

## Holiday Gifts to Local Endowment Funds

The Community Foundation maintains endowments for 20 nonprofit institutions named below. During the holiday season we invite you to make contributions benefiting one or more of these local charitable institutions helping to shape the well-being of our community.

To communicate your generosity, the Foundation staff will send the organization a card informing them of your contribution to their endowment. Your gift may be further recognized as a *memorial* or *honorarium*, which the Foundation will also communicate to an individual or family on your behalf. To facilitate your gift, reply envelopes are enclosed in this newsletter.

- Animal Shelter Endowment
- Anniston Museum Corporation Endowment
- Ashland First United Methodist Church Endowment
- Boys & Girls Clubs of East Alabama Endowment
- Boy Scout Troop 247 Endowment (Centre, Alabama)
- Calhoun/Cleburne Mental Health Board Endowment
- Calhoun County 4-H/Alabama Tree Trust
- Community Foundation Operating Endowment
- East Central Alabama United Cerebral Palsy Endowment
- First Presbyterian Church of Anniston Endowment
- Hank Turpin Endowment benefiting Habitat for Humanity
- Jacksonville City Schools Endowment
- Joy Catherine Courtney Endowment benefiting 2<sup>nd</sup> Chance, Inc.
- Kiwanis Club of Anniston Endowment
- Knox Concert Series Endowment
- Parker Memorial Baptist Church Endowment
- Piedmont Education Trust Endowment
- Public Library of Anniston and Calhoun County Endowment
- Rainbow Omega Endowment Fund
- Sacred Heart Catholic School Endowment
- The Longleaf Fund (Unrestricted Endowment)
- YMCA of Calhoun County Endowment

Contributions in any amount can be made by addressing your support directly to the Community Foundation for the benefit of one or more of the above endowment funds. All gifts will be acknowledged and then communicated to the organization. For stock transfers, sample will language, or to arrange a planned gift benefiting any endowment, please contact the Community Foundation.

## Trustees Appreciation

During the Annual Board Meeting held on October 11, the trustees transitioned leadership with the following new officers: **Mr. Joseph B. Freeman**, CPA, Chairman of the Board; **Mrs. Terry Childers**, J.D., Past Chairperson; **Mr. Forrest French**, Vice-Chairman and Chairman Elect; **Mrs. Betty Hill Jackson**, Secretary and **Dr. Arthur Toole, III**, Treasurer.

The trustees also honored the service of **Mrs. Janice Frazier Hudson**, **Dr. James Daniel**, **Mr. Robert Smith** and **Dr. D. Wesley Smith** for their tenure on the Board of Trustees.



*Dr. Smith receives the Chairman's Award*

In presenting framed resolutions, **Mrs. Terry Childers**, stated, "All of us are grateful for your work these past years as you helped translate \$5.2 million dollars into aid, resources, jobs, programs and services that have made a direct impact in the lives of our neighbors or helped strengthen our nonprofit partners. Thank you for the hundreds of hours you spent in preparing for meetings, reviewing applications, attentively giving advice and ultimately governing the mission of the Community Foundation. We are indebted to you and we offer our sincere appreciation."

## New Trustees Elected

The Board of Trustees elected four new trustees to serve three-year terms at their annual meeting held on October 11. Trustees are selected based on a set of written Leadership Values and after the board conducts an assessment of existing talents and skills. This process then guides the Governance Committee in identifying candidates with a set of specific abilities or backgrounds. Newly elected trustees are: Robie Grana, Steven Folks, Cheryl Potts and Jack Swift.

**Robie Grana** is a native of Puerto Rico but has lived in the area for the past 23 years. She has volunteered with several organizations and is very active with Sacred Heart Catholic Church. **Steven Folks** is a retired military police instructor and has worked for the past seven years as the director of the Carver Community Center. **Cheryl Potts** has a background in public administration, is a resident of Oxford and is actively involved in community initiatives. **Jack Swift** is Senior Vice-President at Colonial Bank and is actively engaged in the community.

“Each of these outstanding individuals provides ideas, insights and new vision to our deliberations,” commented Joseph B. Freeman, Chairman of the Board. “We welcome them and we are very pleased and grateful for their service.”

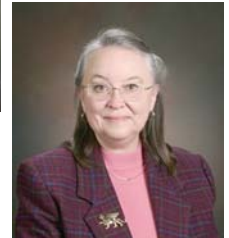
*Steven Folks*



*Robie Grana*



*Jack Swift*



*Cheryl Potts*

## Congress Passes the Charitable IRA Provision



Our nation has long endorsed and encouraged the giving of assets to promote charitable endeavors. The IRS Code has dozens of charitable provisions that

many citizens seldom utilize. Recently Congress passed legislation to strengthen America's retirement and pension system while also adding a long-awaited charitable IRA provision.

**SUMMARY:** From August 17, 2006 until December 31, 2007, individuals who are 70½ years of age or older, can make **TAX-FREE** charitable gifts from an Individual Retirement Plan (IRA) directly to a 501(c)3 public charity such as the Community Foundation. This short window of opportunity may be a wise election for both voluntary and mandatory withdrawals from both a traditional IRA **AND** a ROTH IRA. Donor may make a distribution in any amount up to \$100,000.

IRAs are an outstanding vehicle to promote your charitable values because assets held in an IRA are not only subject to income tax when withdrawn during life, but they may be subject to estate tax if given to anyone other than a spouse. Moreover, these charitable distributions fulfill the mandatory distribution requirements.

**NON-IRA RETIREMENT ACCOUNTS:** Funds accumulated in a 401(k), 403(b), or other types of retirement accounts do not qualify. Consult your tax or financial advisors to determine if you can transfer funds from this type of account into an IRA and then make a charitable gift.

**EXAMPLE:** Mary, age 81, has assets exceeding \$2 million (estate tax threshold) and is concerned that at her death the combined income and estate taxes could consume the majority of an IRA funded through her late husband's retirement plan. She decides to make a \$100,000 tax-free distribution to the Community Foundation in both 2006 and 2007, which she does not report as income and further reduces her overall estate value. With her gift, Mary establishes a charitable fund honoring her husband to provide perpetual grants to benefit children in foster care.

**BENEFITS FOR YOUNGER DONORS:** If you are 59½, distributions may be withdrawn from an IRA or other qualified plan and then donated to the Community Foundation **WITHOUT** a 10% penalty. These gifts are reported as income; however, the amount can then be deducted as a charitable contribution, which generally results in a “wash” for federal income tax purposes. Check with your advisors for more details.

*The Community Foundation can assist in helping you achieve your charitable goals through this new legislative opportunity or through other gifting vehicles such as Charitable Gift Annuities and Life Estates.*

# Community Listening Sessions Update

In August, the Board of Trustees held five community meetings to present the 2006 Calhoun County Community Counts data and to gain public comment on local recommendations. General countywide critical statistics were presented at each event followed by a summary of the most serious city data. Residents attending the sessions were then asked to identify the top three most important quality of life indicators that needed improvement. The results included the following:



## Oxford/Hobson City

1. Increase funding for the arts
2. Increase local financial support for Oxford School System
3. Decrease death rates related to cancer and heart disease

## Jacksonville

1. Increase after-school tutoring for all grades and implement a summer program for at-risk youth
2. Provide funding for quality daycare and early learning programs
3. Expand public transportation access throughout the county

## Anniston

1. Increase quality, affordable Pre-K programs
2. Provide 2- and 4-year scholarships for all Anniston High School graduates who qualify to attend either JSU or Gadsden State
3. Revitalize the career training program at Anniston High School

In October, the Board of Trustees met for an extended Planning Session to: *i*) compare the critical factors in the data with the ranked priorities from the public, and *ii*) identify two or three priorities for the Foundation to consider as major funding goals. After the four-hour meeting, the Board captured a list of priorities that they wanted to study further. It was clear that each issue may require several approaches including legislative policy change, multiple stakeholder collaborations and program development. The initial list included the following concerns:

## Piedmont

1. Provide accessible career training for Piedmont High School students
2. Increase the number of adults who have a high school diploma or access to job training
3. Establish a disaster preparedness plan and training for responders

- Strengthening Quality Early Education Resources
- Expanding Public Transportation in Calhoun County
- Providing Prevention for Tobacco Products
- Improving Access to High School Technical Training and Job Readiness Skills

## Ohatchee/Alexandria

1. Establish a community learning center at Alexandria Elementary School
2. Increase job training and vocational education programs related to available industry jobs
3. Decrease the number of students that leave high school without a diploma or GED

*If you wish to submit your comments on any of these proposed recommendations, please send your views by December 18<sup>th</sup>.*

## *Memorial Gifts (July 11th thru November 10, 2006)*



### **George S. Kennedy**

Olga S. Kennedy

### **Ruby Kiser**

Larry & Jane Gowens

### **Violet Kisor**

Leon Garrett

Larry & Jane Gowens

Alan Hunt

### **Christopher Vaughn Melson**

Mary Ann Hitt

### **Alice Minton**

Larry & Jane Gowens

### **Billy Minton**

Larry & Jane Gowens

### **Betty Needham**

Larry & Jane Gowens

### **Edward Pitts**

Don & Ann Sprayberry

### **Rosa Potozky**

David, Kathy, Will & Wyatt West

### **Jewell Reid**

Larry & Jane Gowens

### **Reese Rhinehart**

Larry & Jane Gowens

Garry, Angela, Andrea

& Breanna Banks

### **Louise Ritch**

Wayne & Nicki Carmello-Harper

### **Sparks Roberts**

Larry & Jane Gowens

### **Ollie Snead**

Drs. Blane Bateman & Margaret  
Davenport

### **Nathan Jackson Sparks**

Jerry & Tawana Bonds

### **Ertis Sprayberry**

C. W. & Kathy S. Wood

### **Elbert "Bud" Willett**

Wayne & Nicki Carmello-Harper

Ken & Paula Hoffman

Joah McKinney

### **Katy Williamson**

Alexander Breeden

Charles & Collie Dickinson

Rick Ford

Daniel Ghee

Dr. John Hollingsworth

Harold Hollingsworth

Mike Jones

William A. Julian

Claude Kitchin, IV

Mr. and Mrs. James D. Prickett

Dr. Gary M. Ray

Mr. and Mrs. Wilkes Scarbrough

Joseph M. Shook

J. Henry Smith, II

T. A. Turner Construction Co., LLC

Dr. & Mrs. Kenneth L. Vandervoort

### **Evelyn Woolf**

Larry & Jane Gowens

### **Dennis Bragg**

Larry & Jane Gowens

### **Coach Joe Faulkner**

Larry & Jane Gowens

Brenda Spears

### **Sarah Mackenzie Gandy**

Ann & Kenny Owen

### **Daniel T. Hartzog**

Mildred R. Hartzog

### **Ned Herren**

Rainbow Omega, Inc.

### **Ben Hollingsworth**

Lois Simmons

### **Otis R. Jackson**

David, Kathy, Will & Wyatt West

### **Barbara Jones**

Larry & Jane Gowens

### **Edna M. Jones**

Eula Tatman

### **Josh Jones**

Larry & Jane Gowens

## *Animal Shelter Endowment Memorials*

### **Jack**

Pet of Susan & Craig Waldron

Eula Tatman

Susan & Craig Waldron

## Honorariums (July 11th thru November 10, 2006)

### Sam & Dolly Burford

Joy Warren

### Larry Easterwood

David, Kathy, Will & Wyatt West

### Susie Franklin

David, Kathy, Will & Wyatt West

### Betty Hines

David, Kathy, Will & Wyatt West

### Sherri Kadle

Don and Ann Sprayberry

### Teresa Kiser

Sherry Blanton

### Peggy Leroy

Ralph & Sherry Butler

### Marge Lyons

David, Kathy, Will & Wyatt West

### Diana Martin

David, Kathy, Will & Wyatt West

### Barbara McCray

David, Kathy, Will & Wyatt West

### Vinson Sparks Montgomery

Don & Ann Sprayberry

### Les Pair

David, Kathy, Will & Wyatt West

### Mike Pruitt

Don & Ann Sprayberry

### Justin Reaves

Lois Simmons

### Bill Thrash

Don & Ann Sprayberry

### Kathy Wood

Don & Ann Sprayberry

## The Anvil Society

Based on the historic role that iron ore mining and foundry work has played in the history of our area, the Community Foundation has established *The Anvil Society*, a legacy program to honor individuals and families who help forge a stronger future for Calhoun County and northeast Alabama. Membership is perpetual and recognizes thoughtful and generous individuals and couples who include the Foundation or one of its established endowments in their will or estate plan.

### MEMBERS

*By Order of Enrollment*

*SUSIE PARKER STRINGFELLOW*

MR. & MRS. ANDREW J. SAKS

HARLAND C. JONES

WAYNE & NICKI CARMELLO-HARPER

BETTY HILL JACKSON

DR. BRENDA ROBERTS

LINDIE K. BROWN

*OLETA B. SPEARMAN*

MARY ELIZABETH JOHNSON

ANGELA W. BANKS

JANICE T. HUDSON

CHRIS & VIRGINIA HOPKINS

RODNEY & JANET GREENWOOD

JEAN L. PHILLIPS

MARY S. BERNHARD

MACK & REBECCA BURT

BOBBY & ELAINE EDMONDSON

ANITA GENEVIEVE TURPIN

JERRY L. & JUDY M. KLUG

L. R. JORDAN

DR. & MRS. D. WESLEY SMITH

RONALD & EULA TATMAN

ELIZABETH S. COLYER

GEORGE B., JR. & LOUISE R. RITCH

*KARAN LEE EVANS*

*H.T. & TERRELL STANFORD*

*DR. GERTRUDE C. LUTHER*

*MARIE T. RAYFIELD*

MRS. STANTON B. INGRAM

DR. DANIEL E. & ESTA G. SPECTOR

REV. & MRS. ROBERT CHILDERS

BEVERLY ALISON RITCH

FORREST & JOYCE FRENCH

MR. & MRS. ROBERT L. JACKSON

SIX ANONYMOUS

### NEW MEMBERS

JOSEPH B. & ELIZABETH G. FREEMAN

SUSAN WALDRON

JOHN & PAULINE PELLO

*ITALICS indicates deceased Society members.*

*Please remember the Community Foundation in your will and please allow us to recognize your generosity.*

## TRUSTEE LEADERSHIP

### TRUSTEE EMERITUS

Juliette P. Doster

### FORMER TRUSTEES

Lindie Brown  
 Thomas J. Brothers, M.D.  
 John Hensleigh, M.D.  
 Kent C. Keys, M.D.  
 Brenda Roberts, R.N., D.S.N.  
 Bill Hagler  
 Hon. Hoyt W. Howell, Jr.  
 Jo Propst  
 H. M. Burt, Jr.  
 Margaret Davenport, D.O.  
 L.R. Jordan  
 Keener Hudson  
 Warren Sarrell, M.D.  
 Jo Rhea Ford, R.N.  
 Anne Jackson  
 D. Wesley Smith, M.D.  
 Janice Frazier Hudson  
 James Daniel, M.D.  
 Robert Smith

**Terry Childers, J.D.**

Community Volunteer

**Jack Swift**

Senior Vice-President  
 Colonial Bank

**Steven Folks**

Retired Military  
 Carver Community Ctr. Director

**Betty Hill Jackson**

Community Volunteer

**Maj. Gen. Gerald Watson** (Retired)

Vice-President for Research  
 Auburn University

**Esta Spector**

ALFA Insurance Agent

**Vikki Floyd**

Assistant Administrator  
 Jacksonville Medical Center

**Leon Garrett**

Retired School Administrator

**Martha Vandervoort**

Community Volunteer

**Joseph B. Freeman, C.P.A.**

Brooke, Freeman & Lee, PC

**James Mullis, Jr., M.D.**

Physician

**Arthur Toole, III, M.D.**

Retired Physician

**Cheryl Potts**

Community Volunteer

**Forrest French**

Broker Associate  
 Coldwell Banker

**Robie Grana**

Community Volunteer



**Wayne Carmello-Harper**  
*President & CEO*



**Angela W. Banks**  
*Director of Operations*



**Eula Tatman**  
*Director,  
 Grants & Programs*

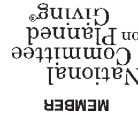


**Susan Waldron**  
*Manager,  
 Board & Donor Relations*

## Mission

The Community Foundation of Calhoun County is a permanent philanthropic resource dedicated to enhancing the quality of life in Calhoun County, Alabama.

Confirmed in Compliance with National Standards for U.S. Community Foundations.



RETURN SERVICE REQUESTED

WEBSITE: [www.yourcommunityfirst.org](http://www.yourcommunityfirst.org)

EMAIL: [info@yourcommunityfirst.org](mailto:info@yourcommunityfirst.org)

VOICE: (256) 231-5160

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*of Calhoun County*

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