

**A NEW WAY TO SHARE OUR WORK**

Many of you are accustomed to hearing from us through a single annual report each spring and newsletters later in the year. This year, we are bringing those updates together into quarterly publications.

We hope this will keep you more connected to the work you make possible and give you more timely insight into emerging needs and the ways your community foundation is working with donors and partners to respond.

In this first issue, you'll find a recap of our impact in 2025 alongside stories that reflect what is possible when generosity and local leadership come together for the benefit of our neighbors.

Thank you for being part of this work.



Photo: Visitors to Historic Jamestowne. Thanks to a WCF grant this spring, Jamestowne Rediscovery Foundation is offering free youth admission to Historic Jamestowne for families utilizing SNAP benefits. The program is available this summer for children age 6–15 living in Williamsburg, James City County, and York County. As the country comes together to celebrate the 250th signing of the Declaration of Independence, this program will offer access to an important historic site for local families.

**INSIDE THIS ISSUE**

**-2- Year In Review**

Thanks to you, 2025 was a remarkable year of progress and growth. WCF exceeded \$44 million in assets, launched local impact investing, and adopted a new strategic plan.

**-5- Community Impact**

La Tienda Fund responds to student lunch debt; Kiwanis Club of Williamsburg Foundation Fund reaches \$1 million for kids.

**-6- Recognizing Generosity**

We are honored to recognize members of the Chair's Circle whose gifts in 2025 totaled \$2,500 or more. We also gratefully recognize those with lifetime giving of more than \$30,000.

27-36% of local households are ALICE (Asset Limited, Income Constrained, Employed)

Who is ALICE? Households that earn above the Federal Poverty Level but can't afford the basic cost of living in their county.

**GRANTMAKING FOCUS**

**Housing & Economic Mobility**

Our neighbors are better able to thrive when they have a safe, stable, affordable place to sleep at night. In greater Williamsburg, 2 out of every 5 renter households are cost burdened, leaving less in the budget for everything else.

It's simply becoming harder for many working families to afford to live in Williamsburg, James City County, and York County.

That is why housing and economic mobility is a growing focus of our work.

See *Grantee Spotlight* and *How You Can Help* on page 3.

# Dear Friends of WCF,

This past year marked remarkable progress and growth.

Together, we exceeded our campaign goal, raising \$1 million to grow our community grantmaking—support that will allow us to increase competitive grants by 2027 and direct more resources to the nonprofits serving our neighbors in Williamsburg, James City County, and York County. We also honored the legacies of Kermit Buntrock and Margaret Wilkins, whose thoughtful estate gifts will expand unrestricted grantmaking for generations to come.

With your generosity, combined with strong investment performance, the Foundation reached a milestone of \$44.5 million in assets—reflecting both careful stewardship and a shared long-term vision.

In 2025, that translated into more than \$214,000 in community grants and \$289,000 in scholarships.

We also took an important step forward by launching local impact investing, beginning with an investment in Locus Bank, a nonprofit lender focused on

affordable housing. This work allows us to move a small portion of our investable assets from Wall Street to invest in our local community. Our primary interests are in providing loans for nonprofit infrastructure and affordable housing. When you make a gift to an endowment at the Foundation, you provide support for your areas of interest and also increase the capital that we can deploy in the community through this effort.

Under the Board’s leadership, a new strategic plan now guides this work, with a clear focus on supporting programs and projects that help individuals and families build long-term financial security.

From housing to childcare to education, we continue to stay closely connected to the ever-changing needs of our community and how our grantmaking and community partnerships can make the most meaningful difference.



Thank you for your continued partnership and for believing in what’s possible when we come together for our neighbors and our community.

With appreciation,

A handwritten signature in dark ink, appearing to read "Alison Lennarz".

Alison Lennarz  
Chair (2024-2026)

A handwritten signature in dark ink, appearing to read "Melinda B. Morgan".

Melinda Morgan  
Chair (2026-2028)



**Last year, two generous individuals who entrusted their estates to the Foundation provided us with the ultimate flexibility to do more good in Williamsburg. We honor Kermit Buntrock and Margaret Evelyn Wilkins for their unrestricted bequests which will enable the Foundation to more than double its grantmaking to local nonprofits over the next few years.**



**\$11.2 M**  
Gifts Received  
in 2025



**\$289,000**  
Scholarships  
Awarded in 2025



**\$214,628**  
Community Grants  
Awarded in 2025



**\$44.5 M**  
Total Assets as  
of 12/31/25

## GRANTEE SPOTLIGHT

# Virginia Housing Alliance

A recent grant to the Virginia Housing Alliance (VHA) reflects our strategic shift to focus on housing and economic mobility (see “Grantmaking Focus,” front page). VHA directly serves housing and community development professionals who participate in training, advocacy, and capacity building programs.

Our grant will support VHA’s advocacy efforts, as well as the development of an annual report that helps Virginia communities understand what it takes to create and sustain affordable housing. In the past few years, VHA’s efforts have supported six projects in Williamsburg, James City County, and York County totaling over \$3 million for 302 new units.

Strengthening the housing ecosystem is essential to building a coordinated response to the housing crisis. And that matters here locally.

James City County is actively exploring the creation of a land trust – an effort that could expand access to safe, affordable housing for years to come. Statewide policy development can make that kind of work more achievable at the local level.

The ultimate beneficiaries are our neighbors who need affordable housing.

To learn more:

[VaHousingAlliance.org](http://VaHousingAlliance.org)

[JamesCityCountyVa.gov](http://JamesCityCountyVa.gov)



## HOW YOU CAN SUPPORT ECONOMIC MOBILITY

In recent years, Foundation grantmaking has focused on six priority areas, including economic mobility – but our giving options didn’t fully reflect that.

Recognizing that needs have grown across Williamsburg, James City County, and York County, our Board has created a dedicated **fund for Housing & Economic Mobility**.

Several Foundation Board members have issued a **1:1 matching challenge** to grow this fund over the next couple of years.

Join us in addressing this critical community need and supporting the partners, ideas, and systems that move our neighbors forward into economic prosperity.



**Housing costs far outpace incomes.**

**\$394,000**

Average home price in James City Co.

**\$96,000**

Income required to afford

**\$1,236/month**

Median rent

**\$49,000**

Income needed to afford

Salaries for many **essential workers**, including nursing assistants, firefighters, police, retail, and childcare workers, **fall below that.**

Make your gift with the enclosed envelope or online at

[WilliamsburgCommunityFoundation.org](http://WilliamsburgCommunityFoundation.org)





Pictured (l-r): New trustees Lori Conen, Phil Emerson (photo credit Randolph Macon College), Monty Mason

## 2026 Board of Trustees

### *Chair*

Melinda Morgan

### *Vice Chair*

Jeanne Zeidler

### *Treasurer*

David E. Bush, CPA, CFP, PFS

### *Secretary*

Barbara Engs Watson

The Rev. Jan M. Brown

Dian T. Calderone, MTX, CPA

Lori Conen

Anthony Conyers III

Philip G. Emerson

Ti'Juana Ghoslon

Cheri Green, CFP

Leigh Houghland

Alison V. Lennarz

T. Montgomery "Monty" Mason

Aashish Matani

Richard D.T. Overy

Iris C. Porush

Edward Robinson

Erin A. Smith

Scott Stabler

Mychael C. Willon

Benming "Benny" Zhang

### *Honorary Trustees*

Cliff Fleet

Katherine A. Rowe

### *President & CEO*

Nancy Coté Sullivan

## Welcoming New Board Leadership

As we enter the second year of our three-year strategic plan, we're grateful to welcome new officers and trustees who will help guide the community foundation in the year ahead.

This year, we have elected three new officers and one continuing officer to lead our board: Melinda Morgan, Chair; Jeanne Zeidler, Vice Chair; David Bush, Treasurer; and Barbara Watson, Secretary.

We also welcome three trustees, including one returning board member: Lori Conen, Phil Emerson, and Monty Mason.

As we continue our longstanding work in community grantmaking and scholarships, we are grateful for leaders willing to bring their time, expertise, and passion to our work.

Read their full bios at [WilliamsburgCommunityFoundation.org/blogs](https://WilliamsburgCommunityFoundation.org/blogs)

## Community Foundations National Standards Accreditation Affirms Our Commitment to Excellence

# CFNS

## ACCREDITED FOUNDATION

Williamsburg Community Foundation is pleased to announce our re-accreditation with Community Foundations National Standards™. This accreditation program affirms that we have met or exceeded the most rigorous benchmarks in philanthropy.

National Standards affirms our commitment to excellence and accountability. It provides assurance that we have sound policies and procedures in place for governance, grantmaking and operations. In short, we meet the highest standards for local philanthropy, and we are able to meet the unique, changing needs of Williamsburg, James City County, and York County.

## DONOR-ADVISED FUND La Tienda Fund Erases School Lunch Debt

Even in a community like Williamsburg, the needs of working families can be easy to miss. For Tim and Amy Harris, one of those – student lunch debt – was an issue they hadn't fully understood until they came across it on Facebook.

"I was surprised to learn that such an issue even existed in our wealthy community," Tim said. "And of course I was touched and grateful that one of our neighbors in Williamsburg had been paying this student debt off anonymously for years."

"It turns out that the kids who are affected are not the ones on free lunch," said Tim in an interview with WYDaily. "They're on reduced lunch. These kids would end up in debt because they wouldn't have enough money to get enough food to eat."

Tim and Amy's decision to act was rooted in their commitment to addressing food insecurity. Through their family business, La Tienda, they've supported local efforts for years, including FISH, Williamsburg House of Mercy, and more.

Retiring student lunch debt felt like a natural extension of that philanthropy, reinforcing something they value deeply: that every child has the food, dignity, and stability they need.



For help, they turned to the Community Foundation, where they've held a donor-advised fund since 2010.

"They connected our grant to the right person in the school system and the funds were transferred within days of our asking," Tim said.

"I give thanks that our family business was in a position to be able to support other families in Williamsburg. You can't get more local with that food relief effort, and it goes to support children, which is meaningful to us."

Their story is also a good reminder that donor-advised funds can be used in ways people don't always expect, including supporting needs within government agencies, like public schools, that fall outside the typical funding streams.

## KIWANIS CLUB OF WILLIAMSBURG FOUNDATION A Million Reasons to Support Kids

In 2025, the Kiwanis Club of Williamsburg Foundation set a new record with their annual KIDS campaign – and reached an incredible milestone: their fund at the WCF surpassed \$1 million!

That growth means bigger grants for the local kids they support. In 2025, Williamsburg House of Mercy, Edmarc, Inc., and the Williamsburg Regional Library Kids Idea Studio received grants from the fund totaling more than \$36,000.

While the Kiwanis Foundation brings the community together each year to give through its KIDS campaign, WCF stewards those gifts, investing and managing the fund.



Pictured: A dad and son explore the Kids Idea Studio at the library in Toano.

Each year, the Kiwanis Club invites local nonprofits to apply and selects a group of "headliners" to highlight and support. The Club adds to the Kiwanis Foundation Fund's annual grants with money collected throughout the year at their fundraisers.

This year's headliners include Colonial CASA; Olde Towne Medical & Dental Center; and the second phase of the Kids Idea Studio, the Natural Playground, at the library in Toano.



**"We are humbled by La Tienda Fund's generous gift and we are deeply grateful. This donation does more than clear outstanding meal balances – it sends a powerful message that our community believes in and supports our students and families. By helping ensure every child has access to nutritious meals at school, this act of kindness removes barriers to learning and reflects the compassion and shared responsibility that make our community so strong." – Daniel F. Keever, WJCC Schools Superintendent**

## WCF LEADERSHIP DONORS 2025

We are fortunate to be supported by a broad and generous network of individuals, businesses, and organizations who believe in the strength of our community. While space does not allow us to recognize every donor in these pages, each gift plays an important role in advancing this work.

### CHAIR'S CIRCLE

We are grateful to recognize the members of the Chair's Circle who gave \$2,500 or more in 2025 to WCF's Annual Fund, Community Endowment and Field-of-Interest Funds, Scholarship, or Designated Funds.

Anonymous (7)  
Linda T. Baker  
William B. & Marga Bales  
Bank of America Charitable Foundation  
Employee Giving Program  
Jayne W. Barnard  
Kenneth & Nancy Barnhart  
William & Karen Bennett  
Mary & Hunt Berryman  
Dr. Theodore & Diana Bodner  
Barbara and Michael Bowers  
Eloise & Dennis Branden  
Henry S. Branscome, LLC  
Susan F. Britcher  
Mr. George U. Brooks, III  
*Mr. Kermit Buntrock*  
Dian T. Calderone  
Mr. & Mrs. R.E. Cannon  
Linda & Tim Caviness  
Micki & Dan Chapin  
Chesapeake Bank  
*Ms. Elaine Chismer*  
City of Williamsburg  
Colonial Capital Williamsburg  
Kiwanis Foundation  
Colonial Italian American Organization  
Compass Wealth Strategies  
Becky Crews  
Charles & Ginny Crone  
John & Julia Curtis  
Mrs. David Dawson  
John G. & Frances Bracken Delker  
S. Jane deSolms  
Stephanie A. Gass  
Sally Jean Fisk  
Colonial Williamsburg Foundation  
John & Sara Fogarty  
Daniel & Debbie Fuchs  
Laura & Vernon Geddy  
Deb Boykin & Jim Goggin  
Irene W. Graham  
*Estate of Dorothy Haramis*  
A. Kent Harrell & Kendall Kerby  
Mr. & Mrs. Harry Haynsworth

Bill & Donna Herman  
Joseph & Berna Heyman  
Douglas & Jill Holroyd  
Kathy & Bruce Hornsby  
JBH Fund  
Daniel & Ingrid Jones Family  
Foundation  
Kay W. Kane  
Jane Kaplan  
*Jack & Paula Kirtland Trust*  
Kaufman & Canoles  
Eleanor & Bruce Knowles  
Mrs. Denise Koch  
David Kranbuehl  
League of Women Voters of  
Williamsburg Area  
Mr. & Mrs. David Lennarz  
Ron & Carolyn Lodzieski  
Aashish Matani & Sherri Nelson  
Leigh & Danny McDaniel  
Sandy & Rick Nahm  
Rick & Lara Overy  
*Pamela J. & James D. Penny*  
Iris C. Porush  
Margaret Beck Pritchard  
Doug & Rose Anne Puls  
Ms. Pamela A. Reiss  
Riverside Health  
Cherry & Eddie Robinson  
Robert Rowan  
Marc B. Sharp & Wilma R. Sharp  
Beth & Scott Stabler  
Craig & Shirley Stambaugh  
Andreas Stathopoulos & Evgenia Smirni  
Paul & Bonita Stockmeyer  
Jane & Bob Taylor  
Imogene & Roger Thaler  
Sally & Jim Thomas  
TowneBank  
Trevor Times Memorial Scholarship  
Michael & Linda Whittaker  
William C. Wilhelm  
*Estate of Margaret Evelyn Wilkins*  
Constance Marie Willett  
Forrest & Chrissy Williamson  
Clarissa C. Young  
Carl & Cindy Zangardi

*Deceased*

### CUMULATIVE GIVING

The Foundation recognizes these individuals and organizations that have made a difference in our community over the years by giving consistently to and through the Foundation. Donors are listed below based on their total gifts to the Foundation since its inception through December 31, 2025.

#### **\$1,000,000+**

Anonymous (2)  
*The Benjamin R. Altshuler Memorial Fund*  
*Supporting Amateur Sports & Public*  
*Transportation*  
Betsy Calvo Anderson  
Micki & Dan Chapin  
*The James P. Perisie Trust*  
*The Gwendolyn B. Sawyer Trust*  
*The Jenny E. Wible Trust*  
Ironhorse Fund

#### **\$500,000 – \$999,999**

Anonymous (2)  
Bobby & Hope Beck  
Dr. & Mrs. James E. Drake  
James City County  
*John & Carol Jamison*  
Kiwanis Club of Williamsburg  
Foundation  
Reggie & Ling Ngo, and Family  
Donald A. Perry Foundation  
*Mr. Philip Richardson*  
*Estate of Margaret Evelyn Wilkins*

#### **\$250,000 – \$499,999**

Anonymous (3)  
Linda & Don Baker  
Jayne W. Barnard  
City of Williamsburg  
John & Julia Curtis  
John & Sara Fogarty  
Daniel & Ingrid Jones Family  
Foundation  
Dr. Stephen E. Lore  
Dr. & Mrs. Hal Mathews  
Bob & Judy Rathert Family Fund  
Jane & Bob Taylor  
*Mildred B. West Family*  
William C. & Elizabeth J. Wilhelm



On February 5, members of The Chair’s Circle gathered at Blue Talon Bistro for “Breakfast with the Chair” to hear about WCF’s recent growth and community impact.

*Pictured (l-r):* David and Alison Lennarz (Chair 2024-2026) with Alexis Swann, TowneBank; Jayne Barnard with Dennis & Eloise Branden; Kendall Kerby, Melinda Morgan (Chair 2026-2028), and Kent Harrell

**\$100,000 – \$249,999**

Anonymous (6)  
 Mary & Hunt Berryman  
 The Corson Family  
 The Crone Family  
 Bill & Donna Herman  
 Kathy & Bruce Hornsby  
 Dr. & Mrs. Thomas Jamison  
 Bob & Lynne Kiley  
 Mr. & Mrs. David Lennarz  
 Beth Scharlop & Roger E. Schultz  
 Wilma & Marc Sharp  
 Scott & Beth Stabler  
 Shirley & Craig Stambaugh  
 Paul & Bonita Stockmeyer  
 Rob & Jill Swain  
 Harry & Judy Wason  
 Williamsburg Health Foundation  
 Williamsburg Music Club, Inc.

**\$50,000 – \$99,999**

Anonymous (4)  
 Peter & Jennifer Belden  
 George U. Brooks, III  
 Dian T. Calderone  
 Lori Conen  
 Donald E. & Janet W. Craig  
 Harris Family & LaTienda.com  
 Joe & Leanne Harrow  
 Joe & Berna Heyman  
 Lee & Paula Hougen  
 A. Kent Harrell & Kendall Kerby  
 Stephanie & Bob King  
 David Kranbuehl  
 Kerry & Peter Mellette  
 Sandy & Rick Nahm  
 Rick & Lara Overy  
 Margaret Beck Pritchard  
 Cherry & Eddie Robinson  
 Sally & Jim Thomas  
 Middle Peninsula Insurance Agency  
 TowneBank  
 Forrest & Chrissy Williamson  
 Diane & Al Woods

**\$30,000 – \$49,999**

Anonymous (3)  
 An Occasion for the Arts  
 Dr. Theodore & Diana Bodner  
 Dennis & Eloise Branden  
 Claudine Carew Scholarship Fund  
 Ed & Nina Curran  
 Michael & Sally Derrig, Derrig Family Fund  
 S. Jane deSolms  
 Charles S. & Millicent P. Brown Family Foundation  
 Sally J. Fisk  
 Vernon M. & Laura D. Geddy Family  
 Ellin B. Gordon  
 Gil & Connie Granger  
 Jill & Alex Guzman  
 Han Zhang & Jinlan Liu Foundation  
 Mary K. Hill  
 Kay W. Kane  
 Jack & Paula Kirtland Trust  
 Greg & Lise Kline  
 Mrs. Denise Koch  
 W. Eric McDonald  
 Thomas Bosley McCary  
 Men’s Charity Tennis  
 Michael G. & Amy S. Millin  
 Barbara L. Ramsey  
 Gale & Bill Roberts  
 SunTrust Bank Foundation  
 Doug & Leanne Sutton  
 Imogene & Roger Thaler  
 Rob & Diane Topping / Covenant Wealth Advisors  
 Allen A. Turnbull  
 Art & Jane Walker  
 Judy & Jack Wickens Family Fund  
 Williamsburg Landing  
 Sally & Ken Wolfe

*Deceased*

**DONATE TO A WCF FUND**

Did you know you can designate your donation to a specific fund at WCF?

You can choose from dozens of scholarship, community endowment, and field-of-interest funds, including the new Housing & Economic Mobility Fund.

**Giving by mail?**

Simply write the fund name on the memo line of your check.

**Giving online?**

At the top right side of our website, click on “Donate Now.” Search for the fund by name or by focus area. You can even support multiple funds in one transaction using the cart feature.

**Giving from a Donor-Advised Fund or IRA?**

Simply note the fund name when recommending your grant or transfer.

**Giving appreciated securities?**

Contact us for stock transfer instructions and let us know how you would like to direct your gift.

Williamsburg  
**COMMUNITY  
FOUNDATION**

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Williamsburg, VA 23185

757-259-1660

[williamsburgcommunityfoundation.org](http://williamsburgcommunityfoundation.org)

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LEARN MORE  
ABOUT WCF

## OUR VISION

A vibrant community with a commitment to ensure that everyone has the opportunity to thrive.



Through its competitive Community Grants program, the Williamsburg Community Foundation brings together charitable gifts from many donors to support the nonprofits working every day to strengthen our community.

A successful campaign that raised \$1 million, combined with strong investment performance and a decision by the Foundation's Investment Committee to increase the annual payout rate to 4 percent, means the Foundation is able to invest more in our competitive grantmaking.



The Greater Williamsburg Community Trust (DBA Williamsburg Community Foundation) is a tax-exempt public charity under section 501(c)(3) of the IRS code. EIN# 54-1927558

*The following is a list of our spring 2026 grantees:*

### *Arts & Culture*

The Arc of Greater Williamsburg  
Opera in Williamsburg  
The Williamsburg Symphony Orchestra  
Williamsburg Youth Orchestra  
Williamsburg Choral Guild

### *Children & Young Adults*

Echo Family Care Partners  
Made 4 Connection  
Girls Sports Academy  
No Shame. Period.  
Real People Educating Others

### *Housing & Economic Mobility*

Catholic Charities of Eastern Virginia, Inc.  
Habitat for Humanity Peninsula & Greater Williamsburg  
Great Aspirations Scholarship Program, Inc. (GRASP)  
Literacy for Life  
Virginia Housing Alliance  
Williamsburg House of Mercy, Inc.

### *Environment & Conservation*

James City County Master Gardeners Association  
Jamestown Rediscovery Foundation  
James River Association

### *Health & Community Wellness*

Avalon Center  
Center for Child and Family Services  
Colonial Behavioral Health  
FISH, Inc.  
Grove Christian Outreach Center  
Lackey Clinic  
Olde Towne Medical and Dental Clinic  
Triangle Stepping Stones  
Virginia Peninsula Foodbank

### *Senior Services*

Williamsburg Area Meals on Wheels  
YMCA of the Virginia Peninsulas