

# Looking Back, Moving Forward

2015 annual report



YEARS



Dear Friends,

*This past year was truly a landmark year for the Community Foundation as we took full stock of the present and focused our plans for the future. In 2016, the Community Foundation of Southern Indiana is celebrating their 25th anniversary. Since 1991, we have facilitated thousands of grants in response to applications from the community but in 2015 we designed a new approach - one that is proactive, data-driven, and strategic.*

To best meet the needs of our communities moving forward, the Community Foundation of Southern Indiana worked with the Indiana University Southeast Applied Research and Education Center to survey Clark and Floyd county residents, nonprofit community service organizations, business and community leaders, and our own fund holders to develop a community-wide needs assessment.

The 2015 Assessment of Needs and Priorities in Clark and Floyd Counties has revealed the whole fabric of who we are as a community—and the Community Foundation’s role within it. It has shown what we do well and what we can do better, providing a robust picture of our current needs, in turn helping us to chart a course for tomorrow.

Having this comprehensive needs assessment is providing the building blocks for our future grantmaking and is allowing us to develop strategic community goals based on our region’s needs and priorities. Basic human needs, education and workforce development, healthful living, economy, arts and culture, and community building were the areas highlighted in the report.

25 YEARS OF IMPACT . . .

We've had a wonderful first 25 years and we wouldn't be where we are today without the help and dedication from people and organizations throughout this community. As you read through this annual report we encourage you to learn more about the community needs assessment, the impact the Community Foundation has had throughout our first 25 years, and think about how by bringing philanthropy and a cooperative spirit together we can accomplish great things today and for future generations.

To you, and everyone who has supported the Community Foundation over the last 25 years, thank you. Together we've been able to accomplish great things and we look forward to continuing to serve this community as the partner, resource and steward for philanthropy for the next 25 years and beyond.

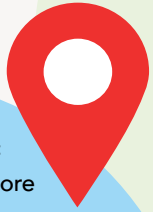
Sincerely,



**Linda S. Speed, J.D.**  
*President and CEO*



**Susie Stewart**  
*Chair, Board of Directors*



**The Lilly Endowment:**  
Our Foundation—Now More  
Than Ever

The impetus behind nearly every community foundation in our state, The Lilly Endowment, Inc., laid the groundwork for all that we do. Today the importance of Lilly Endowment to the Community Foundation of Southern Indiana cannot be overstated. Thanks to a generous match from Lilly Endowment, through March 31, 2016, your gift to our Community Endowment Fund will be doubled. There's never been a better opportunity for you to help reinforce the work we do and build a stronger tomorrow.



**The  
Beginning**

The Community Foundation of Southern Indiana was formed with early grants from the Lilly Endowment, Inc., the Paul Ogle Foundation and the help of some dedicated Southern Indiana residents who wanted to build permanent charitable resources to support our region. The Foundation was established in 1991 with just a few funds and \$1 million in charitable assets. Today, the Foundation has grown into a strong and well-rooted organization that has awarded over \$23 million in grants, manages over \$30 million in charitable assets and administers over 230 individual funds – each of which supports the unique charitable intent of the donor who established the fund.



# Learn.

1991

Thanks to the vision of community volunteers, the Community Foundation was established in 1991 with support from the Paul Ogle Foundation and Indianapolis-based Lilly Endowment, Inc. Without the support of these two foundations over the last 25 years, the Community Foundation would not be as strong as it is today.



# Work. Prosper.

## A Rising Workforce Lifts a Whole Community

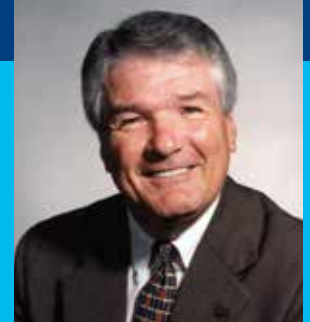
Education and workforce development were identified in the Needs Assessment as essential components to our community's well-being. Better education means a more qualified workforce, stronger businesses, better jobs, and a higher quality of life for everyone in Southern Indiana.

With four public school districts, a community college, regional public universities, WorkOne, a range of private and charter schools, and quality educational attainment programs like Education Matters Southern Indiana, Clark and Floyd Counties are well positioned to empower our population with higher levels of degree and quality credential attainment leading to greater career opportunities.

As our Needs Assessment has demonstrated, improvements in educational attainment and the quality of education are paramount to our region's prosperity. Moving forward, as we have been for the last 25 years, the Community Foundation will continue to be passionately involved in creating greater educational and workforce opportunities for our communities. Our program, Education Matters Southern Indiana, is already working to address our region's attainment numbers and continues to make an impact through our grants and through community leadership initiatives.

1992

Dale Orem was hired in 1992 as the Foundation's first executive director. By 1994, with the support and guidance of our community, the Foundation would take root and grow to hold nearly \$7 million in assets.



# Strong. Active.

## Our Commitment to Healthful Living

Our Needs Assessment revealed a strong call for improved focus on healthful living, including air and water quality. After all, a cleaner, more beautiful environment promotes healthful, happy living and helps to attract business and tourism to our region, and a healthy community depends on healthy citizens.

In our first 25 years, the Community Foundation has played a vital role in helping to create safe, vibrant public parks and greenways for exercise, recreation and a sense of civic well-being—because when our residents are outside and on the move, our entire community moves forward.

As we look to our future, the Community Foundation may seek to help address those areas that are essential to the health of our populations, be it improved public transportation, air and water quality, wellness education, initiatives to combat obesity and diabetes, or addressing the need for access to fresh, local produce.

1995

In 1995, the Community Foundation held over \$7 million in assets and awarded \$93,000 in grants and scholarships.

# Vibrant



CLARKSVILLE	
Clarksville Family Aquatic Ctr.	101
Falls of the Ohio State Park	152
Woodland Loop Hiking Trail	0.5
Auldland Park	0.5
Big Four Bridge Access	1.6

Our Needs Assessment has also helped us understand how challenges in one area are inextricably linked to those in others. Education, the workforce, arts and culture, health and well-being, the environment, our public spaces, and basic human needs – they are all intertwined.

Our objective is to take a strategic, holistic approach – because when we make a positive impact in one area, it can affect positive change in another.

1996

The Community Foundation moved to its permanent home in the One Commerce Square building.



# Com

1998

The 100th permanent fund was established in 1998 and over the next few years, support for the Community Foundation would grow. By the end of 1999, the Community Foundation had awarded over \$1 million in grants to our community.

# munity Needs

## Delivering the Essentials for Those in Need

Providing for the basic human needs of our most vulnerable populations has been an essential component of the Community Foundation's mission for 25 years—and following the Needs Assessment results, it will remain a top priority looking forward.

Over 26,000 people in Clark and Floyd Counties are food insecure. Finding affordable housing presents substantial challenges for many of our residents, with many low-income renters susceptible to homelessness.

And as our Needs Assessment has made clear, while homelessness is a top priority, providing for basic human needs also means providing assistance to those with mental illness and those trying to find or return to paid work. Getting them on their feet is a crucial step in improving our workforce and bolstering our economy.

Our unrestricted Community Endowment Fund generates grants to help meet these essential requirements for a basic standard of living. Your gift does incredible good for our community. Give through March 2016 and your impact will be doubled, thanks to a generous matching opportunity offered by the Lilly Endowment.

2001

The early 2000s were a time of great growth for the Community Foundation. With a grant from the Paul Ogle Foundation, the Youth Philanthropy Council was formed to bring youth on board in meaningful ways, to encourage them to give and serve in their communities and to make philanthropy a habit for future generations.

# A Stronger Fo

## Our Commitment to a Thriving Economy

Our region's economy supports, and is supported by, everything we do as a community. The more we can strengthen our economy, the more we will enhance education, business development, arts and culture, the environment, and tourism—in turn building more prosperity and a better quality of life into the future.

In taking stock of the regional economy, our 2015 Needs Assessment highlighted the crucial importance of good jobs.

2002

In 2002, the Early Warning Emergency Sirens project was funded in partnership with local governments, individuals, and private foundation support. The project installed severe weather sirens throughout Clark and Floyd Counties.

# oundation

As is true of many economies around the nation, unemployment in our region is relatively low, but poverty is on the rise. That means we must build, attract, and retain the kinds of businesses that provide high-quality jobs and pay true living wages.

As we look forward to the next 25 years, the Community Foundation may help to find innovative and impactful ways to create connections, improve our workforce, and construct a sustainable infrastructure for the future prosperity of our region.



2004

By this time, the Community Foundation became the seventh largest of 94 Indiana community foundations and three supporting organizations were formed under the Foundation's umbrella to restore and maintain the Jeffersonville Carnegie Library, manage the One Commerce Square building, and to provide for the economic development efforts of One Southern Indiana.

# To Nurture and

## Enriching Arts and Culture for All

The promotion of arts and culture does wonders for our community, enriching the lives of our citizens and attracting visitors to our region. Just this past year, the Community Foundation made over \$52,000 in grants to support educational opportunities and nurture arts and creativity in our community.

Most importantly, as our 2015 Needs Assessment has shown, there is a clarion call for arts and cultural opportunities that span economic income levels. Looking to the future, the Community Foundation of Southern Indiana will use this information to look at ways that we can help develop a rich and robust artistic and cultural environment accessible for all.



2005

In 2005, the New Albany-Floyd County Education Foundation became the Community Foundation's fourth supporting organization and over the next several years the Community Foundation became increasingly involved with community initiatives. The Jeffersonville Carnegie Library restoration project was completed, the Multicultural Outreach Council and Women's Foundation of Southern Indiana were established, and the Dictionary Project and Dolly Parton's Imagination Library were both established in our area to increase literacy in our region.

# Inspire

Your generous gift to our unrestricted endowment will help us share our community's wealth of arts and culture with all of our residents and inspire generations to come.



2009

By the end of 2009, the Community Foundation had grown to hold \$20.5 million in charitable assets.



# A Quarter-Cen

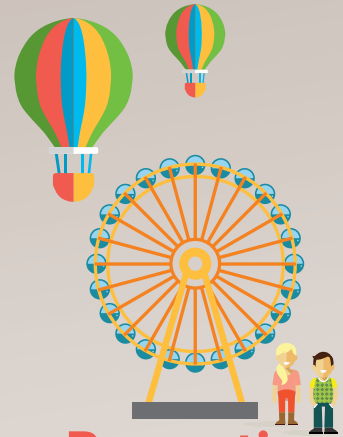
## A World of Good

Through the initiative and generosity of a group of Southern Indiana residents and the consistent support of the Lilly Endowment, Inc. and Paul Ogle Foundation, the Community Foundation of Southern Indiana was established in 1991 with nearly \$1 million.

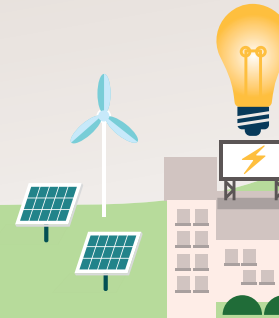
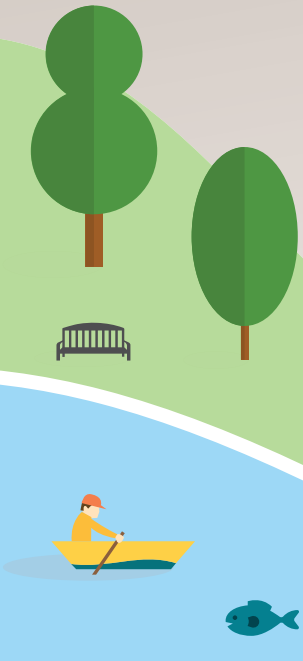
Throughout our history the Community Foundation has assumed a leadership role in our community. During the market surge of the 1990s the Foundation grew quickly, awarding over \$1.7 million in grants in 1999. In 2002 we granted funds to install early warning emergency sirens throughout Clark and Floyd Counties, which continue to operate today, helping to save lives.

Since its inception 25 years ago, the Community Foundation has granted more than \$23 million in scholarships and grants, including over \$2 million from our Community Endowment Fund to directly support our region's greatest needs and highest priorities.

As the Community Foundation continues to grow, our leadership role and reach grows, too—promising even greater impact, a stronger community, and more lives enriched in the next 25 years and beyond.



**Recreation**  
\$46,300



**Environment**  
\$30,200



2011

The Community Foundation celebrated its 20th anniversary by developing a new comprehensive strategic plan focused on fulfilling our role as the community's partner, resource and steward in philanthropy.

tury

Historical grants made from the Community Endowment Fund include:



**Arts and Culture**  
\$153,100



**\$465,900**  
**Community Development**



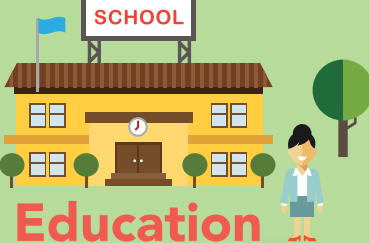
**Health**  
\$293,700



**Religion**  
\$14,000



**Human Services**  
\$514,600



**Education**  
\$193,200



**Youth Development**  
\$230,300

2012

The Community Foundation played an important role in the long term recovery efforts following the March 2, 2012 tornadoes, granted over \$325,000 and donated hundreds of hours of staff volunteer time to March2Recovery to help with the rebuilding efforts in Henryville and surrounding communities in Clark County.



# Onward. Upward.

## Education Matters Takes Lives to the Next Level

A high-quality, educated workforce is key to economic development and a better quality of life for all. As one of the only non-metro regions to receive a grant from the Lumina Foundation, Southern Indiana is in a unique position to strengthen its workforce through increased post-secondary attainment.

One in four of our region's adults have earned some college credits. Education Matters Southern Indiana (EMSI) is a program of the Community Foundation of Southern Indiana and three neighboring community foundations with the sole focus of increasing these attainment numbers by coordinating with businesses, civic leaders, and educational institutions to collaborate, streamline services and secure the level of investment needed to help those residents achieve their certifications and degrees.

EMSI has experienced significant early growth and, this year, the program launched a grassroots public awareness campaign engaging over 60 ambassadors and charging them with spreading the word throughout Southern Indiana about the importance of more adults completing their college degree or technical certificate. EMSI has also worked to establish a "One Stop" resource for adults to evaluate their degree or certification completion options and navigate the entire process from enrollment to graduation.



2015

As part of the Community Foundation's focus on more impactful grants, in 2015, Clean Socks Hope received one of the Foundation's first Catalyst grants. Clean Socks Hope is pursuing a special project to raze a former drug house, clearing three lots and re-purposing the property as a neighborhood green space. The goal is to supplement their wildly successful Midtown Neighborhood Network Food Co-op by creating space that their clients' children and the community can use to learn, supplement and end food insecurity by growing what is needed and then create an economy by selling their excess yields at New Albany's Farmers Market.

rd.

EMSI is working with local institutions to establish programs that help adults persist to degree completion such as an emergency fund aimed at preventing adults from dropping out of college due to unexpected events.



2015

The 2015 Assessment of Needs and Priorities in Clark and Floyd Counties was completed and the Foundation had grown to hold \$30 million in assets.

# A New Gener



THE NEXT **25** YEARS . . .

# ation of Giving

## Youth Philanthropy Council Works to Maximize the Future

The millennial generation is remarkably philanthropic—in 2014, 87% of millennials donated money to a nonprofit—and it appears that the trend will continue with the younger generations to follow. The Community Foundation of Southern Indiana's Youth Philanthropy Council (YPC) takes an active approach to involving young volunteers in meaningful ways. We want to make philanthropy—not just financial gifts, but active volunteerism—a habit for the future.

Through grants to such organizations as the Clark County Youth Shelter, Open Door Youth Services, Hope Southern Indiana, the YMCA and area schools, students from our community will work with adult volunteers to learn about leadership and the power of philanthropy. In the process, and with your help, the YPC can leverage our youth's impulse to give back, instill deeper values of volunteerism, and multiply their impact in the community.

Your generosity can impact a generation—and many more to come.

...Begins  
Now

Over the next 25 years, the Community Foundation of Southern Indiana will use the 2015 Assessment of Community Needs and Priorities in Clark and Floyd Counties as a guide to help us address the greatest needs of our community and make the greatest impact on our residents. The Community Foundation looks forward to continuing to serve as the region's partner, resource and steward for philanthropy; providing charitable resources to our area's nonprofits; and helping individuals, families, companies, and nonprofits leave charitable legacies for future generations.

### **Your Partner, Resource and Steward in Personal Philanthropy**

For 25 years, the Community Foundation of Southern Indiana has worked to create great communities in Southern Indiana by promoting and facilitating effective philanthropy. We have accomplished a great deal already, thanks to the generosity of donors who invest through the Community Foundation in their own personal philanthropic passions—whatever those might be—and by being good stewards of those philanthropic investments to build a permanent source of charitable funds for this community.

We work closely with individuals, businesses, non-profit agencies and families to create customized charitable funds that capture all of their philanthropic wishes. Our donors have established more than 230 separate charitable funds — either for the common good of Southern Indiana or for special interests of their own. The Community Foundation holds and invests these assets, and administers each fund in accordance with its donors' wishes, often in perpetuity. Our donors appreciate the flexibility, ease and cost-effectiveness of giving through the Community Foundation.

*It is easy to donate to your favorite charitable causes through your own personalized fund at the Community Foundation. Just give us a call at (812) 948-4662 to get started.*

### **Ways to Give**

Each citizen in our community has unique interests and ideas for how to give back. Whatever your goals, whatever your means, whatever your passions, the Community Foundation can help you create a customized charitable fund to realize your dreams. Do you want to help students attend college? Would you like your children and grandchildren to one day help determine the charitable organizations that benefit from your fund? Are there specific non-profits—perhaps your alma mater or place of worship—that should always benefit from a fund you create? Is there a particular area of interest, such as children's health, the environment or education, that you would like your fund to always support? Or do you simply want to give back to your community and help address its greatest needs at any given time?

*All of these goals are possible through a customized charitable fund created at the Community Foundation. If you can dream it, we can help you achieve it.*

### **Permanent Endowment Funds**

Donors who would like to create a permanent legacy for their charitable interests may establish an endowment fund. With endowment funds, principal is never spent. Instead, a portion of earnings becomes available each year, based on the Foundation's spending policy, for grants to the donor's specified charitable cause. Endowment funds, which may be started with a minimum gift of \$15,000, are a wonderful way to support your favorite organizations or interests, in your name, forever.

### **Pass Through Funds**

Donors who want to streamline their current giving often establish a pass through fund at the Foundation. With an initial minimum gift of \$1,000, your fund may make grants of all or any part of the fund balance, at any time, to your favorite charitable causes. Many donors make additional contributions to their fund over time to sustain current giving. You keep track of only one tax receipt, but may make as many charitable gifts as you like from your single contribution. Pass through funds are an excellent way to take advantage of a windfall or bonus, or the need for an income tax charitable deduction, and can help simplify your giving year-round.

## Why Give Through the Community Foundation



We make your giving easy, flexible and meaningful. We take all of the administrative details, investment issues, reporting and regulatory requirements out of your hands. You simply decide the charitable purpose of your fund, and we do the rest. A single gift can create a fund that will further your personal giving goals in perpetuity.

The chart below can help you decide if creating a fund at the Community Foundation is right for you.






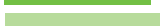


### Is a Fund at the Community Foundation Right For You?

WHAT IS YOUR GOAL?	TYPE OF FUND TO CONSIDER:
I currently support one or more charitable causes	You can create an endowment or pass through fund customized to fit your interests that will streamline and simplify all of your current giving—one gift, one tax receipt, and your one fund can benefit as many charities as you like.
I want to involve my children and my grandchildren in learning to give back	A family advised fund can provide the benefits of a private foundation without the hassles and expense, and can involve several generations of advisors to facilitate a family tradition of giving.
I know the particular charities that I always want to support	Your fund will send annual checks in your name to your selected charities.
I want to help students get an education	A scholarship fund can be customized to benefit students from a particular school, those studying a particular field, or whatever focus you choose.
I want to give back to my community	A Community Endowment fund in your name will support the community's needs now and in the future.
I want to leave a permanent legacy for my charitable interests	You can make a gift to the Community Foundation in your will or trust; we will work with you to create a customized endowment fund for the future that will benefit your favorite causes, in your name, forever.








## 2015 Financial Highlights

<b>Total Assets as of December 31, 2015</b>	<b>\$ 30,454,182</b>
<b>Total Gifts in Calendar Year 2015</b>	<b>\$ 2,822,740</b>
<b>Total Grants in Calendar Year 2015</b>	<b>\$ 1,208,401</b>

## Endowed Funds – By Type












Planned Gift Funds	\$1,204,242	5%	
Field of Interest Funds	1,499,349	6%	
Donor Designated Funds	1,660,239	6%	
Agency Funds	1,728,382	7%	
Donor Advised Funds	5,111,077	20%	
Board Advised Funds	5,400,848	21%	
Scholarship Funds	9,216,662	36%	
<b>Total Endowed Funds</b>	<b>\$25,820,799</b>	<b>100%</b>	

## Non-Endowed Funds – By Type

Planned Gift Funds	\$ 11,424	1%	
Agency Funds	26,253	2%	
Donor Designated Funds	41,511	3%	
Field of Interest Funds	65,252	4%	
Scholarship Funds	140,584	9%	
Donor Advised Funds	1,259,866	82%	
<b>Total Non-Endowed Funds</b>	<b>\$ 1,544,890</b>	<b>100%</b>	

**Total Funds \$ 27,365,689**

## Grants by Purpose

Recreation	\$ 12,197	1%	
Youth Development	27,386	2%	
Arts and Culture	52,475	4%	
Community Development	56,454	5%	
Religion	76,491	6%	
Environment	92,772	8%	
Human Services	119,014	10%	
Education	196,721	16%	
Scholarships	273,540	23%	
Health	301,351	25%	
<b>Total 2015 Grants</b>	<b>\$ 1,208,401</b>	<b>100%</b>	

## Community Grants—Addressing Today's Needs

Since 1991, the Community Foundation has granted over \$2 million to organizations serving residents of Clark and Floyd Counties from the Foundation's Community Endowment, our unrestricted permanent endowment fund. This discretionary fund is used each year by our board of directors and our Community Grants Committee to award grants that provide for the community's most pressing needs. Over time, those needs change and with the recently completed 2015 Assessment of Needs and Priorities in Clark and Floyd Counties, the Community Foundation will focus our efforts on the areas which our community has identified as the most important priorities for our region.

When you think about your own charitable giving, we encourage you to consider supporting our Community Grants program. Your contribution of any amount can support the current year's grant funding or add to the Community Endowment Fund, which provides ongoing support for these grants. This is the simplest and most flexible way to give and provides meaningful resources to our region's nonprofit partners.

### Community Grants

- Arts Council of Southern Indiana
- Big Brothers & Big Sisters of Kentuckiana
- Blessings in a Backpack, Inc.
- Boys and Girls Clubs of Kentuckiana
- Brandon's House Counseling Center, Inc.
- Christian Formation Ministries, Inc.
- Clark County Youth Shelter & Family Services, Inc.
- Clean Socks Hope
- Dare to Care Food Bank
- Greater Clark County Schools
- Home of the Innocents, Inc.
- Hoosier Environmental Council
- Junior Achievement of Kentuckiana, Inc.
- Kentucky Shakespeare Festival, Inc.
- Louisville Orchestra, Inc.
- Louisville Visual Art Association, Inc.
- Metro United Way, Inc.
- New Albany Deanery Catholic Youth Ministries
- New Albany Floyd County Education Foundation, Inc.
- Personal Counseling Service, Inc.
- Providence Self Sufficiency Ministries, Inc.
- Wesley United Methodist Church
- YMCA of Southern Indiana, Inc.

### Discretionary Grants

- Norton Healthcare Foundation for the Pat Harrison Cancer Center

### Youth Philanthropy Council Grants

- Rock Creek Community Academy
- Greater Clark County Schools
- Open Door Youth Services
- YMCA of Southern Indiana, Inc.
- West Clark Community Schools
- Miles for Merry Miracles
- Clark County Youth Shelter & Family Services, Inc.
- Hope Southern Indiana

### Board Advised Funds

The Community Foundation of Southern Indiana's board advised funds provide important support for the Foundation and our community. These permanently endowed funds are an excellent way to give back to your community and leave a lasting legacy. With each of these funds – the Community Endowment Fund, Community Foundation of Southern Indiana Education Fund, and Operating Endowment Fund – a minimum gift of \$1,000 creates your named fund. If you want to give back to the community you call home, but don't have a specific cause in mind, you can contribute to these funds which will benefit our entire service area.

*We would like to recognize the following donors who created funds within the Community Endowment, Operating Endowment, and Education Fund to help us support the programs of so many deserving not-for-profit organizations and people in our area.*

### Community Endowment Fund

If you want to give back to the community you call home, but don't have a specific cause in mind, you can contribute to the Foundation's Community Endowment, which benefits our entire service area by providing funds for the Community Grants Program. During 2015 you can double your donation to this fund thanks to a matching opportunity from the Lilly Endowment, Inc. This is the most flexible type

of fund for anyone who wants to give back to the community.

- Mr. and Mrs. Gary T. Banet Fund
- Phillip and Amy Beaman Fund
- Kevin and Cindy Cecil Fund
- Cody Family LLC Fund
- J. Terrence Cody Fund
- Patrick T. Cody Fund
- Shane Cody Fund
- Dr. Uric Dufrene Fund
- John and Barbara Geltmaker Fund
- Lighting the Way Fund
- Mr. and Mrs. Bill Hanson Fund
- Mr. and Mrs. Thomas Hardy Fund
- John and Martha Hartstern Family Fund
- Huffman Family Endowment Fund
- David C. and Rebekah Hussung Giving Fund
- Joe and Kathy Jacobi Fund
- Jacobi, Toombs & Lanz, Inc. Fund
- Mr. and Mrs. Michael Larner Fund
- Leslie Lewis and Associates, LLC Fund
- Mr. J. Patrick More Fund
- Mr. and Mrs. R. Gregory Neely Fund
- Mr. and Mrs. Dennis Ott Fund
- Paul Ogle Foundation
- Mr. and Mrs. Larry Ricke Fund
- Ricke Family Fund
- Honorable Carlton E. Sanders and Mrs. Sue Sanders Fund
- Mr. S. Butch Shaw Fund
- Mike and Susie Stewart Fund
- Tom and Linda Speed Fund
- Starlight Foundation, Inc. Fund
- Ms. Rebecca Taylor Thomas Fund

- Mr. and Mrs. Michael D. Waiz Fund
- Mr. and Mrs. Anthony M. Zakrzewski Fund

### Operating Endowment Fund

The Operating Endowment Fund is a permanent fund that will forever help the Foundation carry out the vision of our donors and support the ongoing operations of the Foundation.

- Kevin and Cindy Cecil Fund
- Cody Family LLC Fund
- Mr. Patrick T. Cody Fund
- Mr. Shane Cody Fund
- Joe and Kathy Jacobi Fund
- Jacobi, Toombs and Lanz, Inc. Fund
- Mr. and Mrs. R. Gregory Neely Fund
- Duke Energy Foundation Fund
- Dr. and Mrs. Stephen Bodney Fund

### Community Foundation of Southern Indiana Education Fund

The Education Fund provides scholarships to Southern Indiana students seeking post-secondary education (two or four-year college degree, vocational or other type of certificate or credential).

- Blue Sky Foundation Fund
- Huffman Family Fund
- Indiana Retired Teachers Association - Southeast Division Fund
- Louise Ross Scholarship Fund
- Robert L. Holmes Educational Scholarship Fund
- Willie Bostick Institute Fund

## CFSI Fund Listing as of December 2015

The Community Foundation is here to support our community and honor the charitable intentions of the donors who have entrusted us to help them with their charitable giving now and after their lifetime. In all, the Community Foundation stewards over 230 individual funds, each of which honors the charitable intentions of the person, family, business or organization who established the fund.

### Donor Designated Funds:

- Art Award Trust Fund
- Center for Cultural Resources at IUS Fund
- CFSI Pooled Donor Designated Endowment Fund
  - Charles L. Shedd Fund
  - C.J. Smith, Jr. Memorial Endowment/ New Albany Deanery Youth Ministries Fund
  - Eugene and Marilyn Glick Foundation Fund
  - Larry Wittlig Endowment Fund
  - Marietta College Endowment Fund/ Larry Wittlig Scholarship Fund
- Children's Hospital Foundation Fund
- City of Jeffersonville Parks and Recreation Fund
- Clark County Youth Philanthropy Council Fund
- Clarksville Community Schools Foundation Fund
- Douglas Family Fund
  - Paris Group Fund
- Floyd County Youth Philanthropy Council Fund
- Glen L. & M.J. Bonsett Memorial Endowment Fund
- Harrison County Youth Philanthropy Council Fund
- Ivy Tech Health Science Division Fund
- James H. Becker 2014 Designated Fund
- - James H. Becker 2015 Designated Fund
- Jeffersonville High School Bus Fund
- - Jeffersonville High School Locker Room Renovation Fund
- Jeffersonville Iraq-Afghan Memorial Fund
- - John and Shirley Woehrle Fund for St. Luke's United Church of Christ
- John Woehrle Fund for Clark Memorial Hospital Foundation
- Lynn Thomsen Memorial Fellowship Fund for the Mary Anderson Center
- Monroe Shine Endowment Fund
- New Albany High School Alumni Memorial Fund
- Personal Counseling Service Fund
- Phil and Sandy McCauley Charitable Fund
- Ruth Braeutigam Fund A
- Ruth Braeutigam Fund B
- Ruth Braeutigam Fund C
- Saint Meinrad Archabbey Endowment Fund
- - Town Clock Church Fund

### Donor Advised Funds:

- Beaman Family Fund
- Betty S. Shine Fund
- Borden Lions Club Foundation
- Bryant Family Fund
- Clarksville Parks Foundation Fund
- David L. McCooe, Jr. Award Fund
- - Donna Riley and Joe Wayne III Charitable Fund
- Eckart LLC Corporate Advised Fund
- Garmon Family Fund

- Gary and Angie Banet Family Fund
- George N. and Beverly M. Lane Charitable Endowment Fund
- - Howard Johnson III Memorial Fund
- James H. Becker Charitable Fund
- Jeffersonville Rotary Special Projects Fund
- - Joan M. Bland Charitable Fund
- Joe and Kathy Jacobi Fund
- John and Shirley Woehrle Fund
- John Johnston Family Endowment Fund
- Keith and Laurie Pulliam Fund
- Kelsey Lynn Martin Memorial Advised Fund
- Kevin and Natalie Nolan Pass Through Fund
- Larner Family Fund
- - Les & Virginia Albro Family Fund
- Matt and Jessica Bergman Fund
- Mike and Susie Stewart Community Enrichment Fund
- - Monroe Shine & Co., CPAs Donor Advised Fund
- Neely Family Fund
- Neely-LaFollette Family Fund
- Ogle Foundation Fund
- - Paula M. Robinson Advised Fund
- Rebecca Taylor Thomas Fund
- Reinhardt Family Fund
- Rotary Club of Jeffersonville Endowment
- S. Butch Shaw Fund
- Sam M. Shine Fund
- Schmitt Furniture Family Fund
- Speed Family Fund
- United Charities/Washington C. DePauw Endowment Fund
- Warder Park Pass Through Fund
- Wellhouse Fund
- Woehrle Family Fund
- Wood-Carr Community Fund
- Wood-Carr Community Passthrough Fund
- York Academy of Discovery Fund
- Your Community Bank Charitable Foundation Advised Fund
- Communities In Schools of Clark County Endowment Fund
- Communities In Schools of Clark County Passthrough Fund
- Council on Developmental Disabilities Fund
- The Falls of the Ohio Foundation Fund
- First Presbyterian Church, Jeffersonville Indiana Endowment Fund
- Floyd County Humane Society, Inc. of New Albany, Ind. Fund
- Friends of Nursing - Clark Memorial Hospital Fund
- Hispanic Connection of Southern Indiana Fund
- Hosparus, Inc. Endowment Fund
- Howard Steamboat Museum Operating Endowment Fund
- IU Southeast Library Endowment Fund
  - Sandra R. Patterson Randles and R. Jeffrey Randles IUS Library Endowment Fund
- IUS/Floyd Memorial Foundation Health Careers Agency Fund
- Jeffersonville Evening Optimist Fund
- Jeffersonville Township Public Library Endowment Fund
- Jewish Hospital and St. Mary's Foundation Fund
- New Chapel United Methodist Church Fund
- Open Door Youth Services Fund
- Park Memorial Endowment Fund
- Prevent Child Abuse of Clark and Floyd Counties Fund
- Robert E. Carter Society Fund
- Silver Heights Campground, Inc. Fund
- United Way of Clark County Endowment Fund
- United Way of Clark County Endowment Fund B
- United Way of Floyd County Fund
- West Clark Literacy Foundation Fund
- YMCA of Southern Indiana Fund

### Agency Funds:

- CFSI Pooled Agency Endowment Fund
  - Arts Council of Southern Indiana Best of Show Award Fund
  - Brooklawn Child and Family Services Endowment Fund
  - Home of the Innocents Endowment Fund
  - Hope Southern Indiana Fund
  - Junior Achievement of Kentuckiana Endowment Fund
  - LifeSpan Resources Endowment Fund
  - Lifespring Foundation of Indiana, Inc. Endowment Fund
  - Providence Retirement Home Fund
  - Supplies Over Seas Endowment Fund
- Childplace Endowment Fund
- City of Jeffersonville Beautification Fund
- Clark County 4-H Foundation Fund
- Clark Memorial Hospital Foundation Fund
- Clark County Natural Resources Conservation Fund

### Field of Interest Funds:

- Charlestown Education Endowment Fund
- Commerce America Foundation Fund
- Community Foundation of Southern Indiana Disaster Relief Fund
- Floyd County CAPE Endowment Fund
- John and Shirley Woehrle Unrestricted Endowment Fund for Clark County
- Norman E. and Katherine S. Pfau Endowment Fund
- Parks and Recreation Foundation Endowment Fund
- Parks and Recreation Foundation Fund
- Silvercrest Endowment Fund
- Silvercrest Grant Fund
- VNASEI Endowment Fund
- Women's Foundation of Southern Indiana Fund
- Women's Foundation of Southern Indiana Grant Fund

## Scholarships

In 2015, The Community Foundation of Southern Indiana distributed 94 scholarship awards with a combined value of nearly

**\$533,000.**

**THANK YOU!**

Scholarships offer students a sometimes life-changing opportunity to continue their education. Some students would not have pursued education beyond high school without these important scholarships and the generosity of our donors. Our thanks go to the following scholarship funds and their generous donors for their contributions to the educational attainment of the next generation of community leaders.

### Scholarships

- 20 Under 40 Scholarship Fund
- - Alexander Knox and Esther (Kahl) Knox Scholarship Fund
- Alice Ranck Hettle Scholarship Fund
- American Legion Bonnie Sloan Post 28 Fund
- Art Award Trust Fund
- Bette Bennett Hammond Memorial Scholarship Fund
- Community Foundation of Southern Indiana Education Fund
- Blue Sky Foundation Fund
- Huffman Family Fund
- Indiana Retired Teachers Association - Southeast Division Fund
- Louise Ross Scholarship Fund
- Robert L. Holmes Educational Scholarship Fund
- Willie Bostick Institute Fund
- Charles and Dorothy Galligan Scholarship
- Claire Dufton "Freechild" Challenge Scholarship Fund
- Clarence R. Hay Memorial Scholarship Fund
- Cleo Fund
- Coach Alex Thom Scholarship Fund
- - Dr. Robert and Mrs. Zoe Hittner Scholarship Fund
- E. G. Read and Margaret Read Scholarship Fund
- Ed Adams Fund - Arts Council Southern Indiana
- Edward Endres Kiwanis Memorial Scholarship for Boys and Girls
- Ethan Bennett Memorial Scholarship Fund
- - Evelyn Heiligenberg Scholarship Fund
- Fleshman Memorial Scholarship Fund
- Floyd Central Student Council/PTA Scholarship Fund
- Floyd Memorial Foundation/Ivy Tech Scholarship Fund
- Forrest McCaffry Scholarship Fund
- Hazel and Walter T. Bales Scholarship Fund
- Helen L. Siebert Scholarship Fund
- - Highlanders' Memorial Scholarship Fund
- Hugh and Mabelle Scott Music Scholarship Fund
- In Name of Jesus Ministries Scholarship Fund
- IUS Paul Ogle Scholars Fund
- IUS Scholarship Fund
- IUS Scholarship Fund/Community First Bank Fund
- IUS/Bayward and Mary Ann Cole Scholarship Fund
- IUS/Clark Memorial Hospital Foundation Endowment Fund
- IUS/Dr. Herb E. Smith Scholarship Fund
- IUS/Floyd Memorial Foundation Health Careers Scholarship Fund
- IUS/Harold Lacy Scholarship Fund
- IUS/John and Shirley Woehrle Scholarship Fund
- IUS/Leon Rand Scholarship Fund
- IUS/Phillip and Mary Louise Brown Scholarship Fund
- IUS/Roy Goode Memorial Scholarship
- IUS/Scott Memorial Hospital Endowment Fund
- Ivy Tech Scholarship Fund for Prosser School of Technology
- Ivy Tech/Clark Memorial Hospital Scholarship Fund
- Ivy Tech-Jesse Ballew Family Scholarship Fund
- Jean Sekora Hudson Educational Scholarship for Women
- Jefferson Masonic Lodge 104 William E. Falk Jr. Memorial Scholarship Fund
- - Jeffersonville Jaycees Scholarship Fund
- JHS Class of 45, Inc. Fund
- John C. Gatz Memorial Scholarship Fund
- Kelsey Lynn Martin Memorial Scholarship Fund
- Kelsey Martin Memorial Tennis Tournament Scholarship Fund
- Kiwanis Scholarship Fund
- Lewis A. Endres Memorial Scholarship Fund
- Mark Bixler Memorial Scholarship Fund
- Martha Hartstern Nursing Scholarship Fund
- Mattie Loughmiller Scholarship Fund
- Melvin and Marjorie Garriott Scholarship Trust Fund
- Michael L. Becher Law Enforcement Scholarship Fund
- New Albany High School Scholarship Award Fund
  - Alice L. Greene Scholarship Fund
  - Joseph B. McClain Scholarship Fund
  - Mark Douglas Scholarship Fund
  - Wayne Gahlinger Memorial Scholarship Fund
- New Albany High School Pooled Field of Study Award Fund
  - A. Fielder Myers Scholarship Fund
  - American Heritage Scholarship Fund
  - Gamma Chi Sorority Nursing Scholarship Fund
  - M. Lucille Reisz Scholarship Fund
  - New Albany PTA Scholarship Fund
  - Scribner Family Endowment Scholarship Fund
- The Newman/Wittlig Endowed Scholarship Fund
- Norman Kratz Scholarship Fund
- Ottis & Lenora Wright Memorial Scholarship Fund
- - Paul and Lois Holtman Memorial Scholarship Fund
- Paul Ogle Scholarship Fund
- Pearl Morris Nursing Scholarship Fund
- Pride of Galena Scholarship Fund
- Raymond Rhodes Memorial Scholarship Fund for the Graphic Arts
- Reverend Farris and Dr. Ramona Clifton Scholarship Fund
- Robert E. Moser Agricultural Scholarship Fund
- Roland H. Money Scholarship Fund
- - Samuel C. Robinson Scholarship Fund
- Shanda Sharer Scholarship Fund
- Sheila Bramlett Memorial Fund
- Steven Bailey Memorial Scholarship Fund
- Tim Brunmeier Memorial Fund
- Your Community Bank Charitable Foundation Scholarship Fund

### Lilly Endowment Community Scholars

Four graduating seniors in Clark and Floyd counties were chosen from 186 applicants to receive full four-year scholarships from the Lilly Endowment, Inc. Community Scholars Program.



**Elizabeth Donaway**  
Jeffersonville High School  
Hanover College



**McKenzie Owens**  
Borden High School  
University of Southern Indiana



**Elena van Hove**  
New Albany High School  
Purdue University



**Sarah Posante**  
Providence High School  
Indiana University Purdue University  
Indianapolis

## Making Plans Now, For the Future

There are several ways to structure a legacy gift that allows you to create your future philanthropic plan now, while postponing the transfer of assets to the Community Foundation until after your lifetime.

### Bequest or Beneficiary Designation

Under these popular options — naming the Community Foundation in your will or trust or as a beneficiary on a life insurance policy or retirement account — you retain the use of your assets or property now while creating perpetual support for your favorite causes after your lifetime.

You can change these plans until your death.

### Charitable Lead Trust

This option allows you to create a trust to make annual income payments to the Foundation for several years to build your legacy fund. The balance of the trust is then distributed to your selected beneficiaries.

## Sample Bequest Language

### Language for IRA or insurance beneficiary designation

Beneficiary: The Community Foundation of Southern Indiana, Inc. (Tax ID # 35-1827813) for the \_\_\_\_\_ Fund.

### Language for bequest

I give and bequeath \_\_\_\_\_ (describe gift) to The Community Foundation of Southern Indiana, of New Albany, Indiana, to be held as a component fund known as the "\_\_\_\_\_ Fund." This fund was separately created for the charitable purposes agreed to by me and The Community Foundation of Southern Indiana.

### I'd like to know more

The Community Foundation of Southern Indiana is honored to be your partner in philanthropy. If you or your professional advisor would like to learn more about our giving options, please contact Linda Speed, J.D., President & CEO, at [lspeed@cfsouthernindiana.com](mailto:lspeed@cfsouthernindiana.com) or (812) 948-4662. You may also visit our website at [www.cfsouthernindiana.com](http://www.cfsouthernindiana.com).

## Give Now, Receive Income For Life

You can create your future legacy fund now by making a gift to the Foundation that provides income for you and/or others for life, then creates an endowment fund to fulfill your charitable objectives after your lifetime.

## Charitable Gift Annuity

You receive a guaranteed, fixed annual payment for your lifetime in return for a present-day gift to the Foundation to create your future legacy fund. You may receive payments immediately or defer them into the future; for example, when you plan to retire.

## Charitable Remainder Trust

You create a trust with your present-day or testamentary gift to the Foundation. The trust provides income to you and/or someone you name for life. Then, at the income beneficiary's death, the remainder of the trust creates your permanent legacy fund.

*The Community Foundation of Southern Indiana does not provide tax, legal or financial advice. With any of these giving plans, there may be gift, estate or income tax implications, depending upon your personal financial situation. You should first consult with your tax, legal or financial advisor before making any charitable gift.*

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## The Legacy Society

The Community Foundation of Southern Indiana is privileged to honor those generous people who give back to our community—in their own individual ways—by making a gift in their estate plans. Those listed here have let the Foundation know they have created a future gift in their plans. In many cases, they have then worked with Foundation staff to establish a fund agreement to govern the use of their gift when the fund receives assets from their estate. As a result, these Legacy Society members are assured their wishes will be carried out by the Foundation in perpetuity.

- Dr. Mark D. Allen
- Mr. and Mrs. Gary T. Banet
- Mr. and Mrs. John Barksdale
- Mr. James H. Becker
- Dr. Mathew and Mrs. Jessica Bergman
- - Joan M. Bland
- Dr. Glen L. and Mrs MJ\* Bonsett
- Ms. Ruth Braeutigam\*
- Ms. Barbara Bunuan
- Mr. and Mrs. David W. Case
- Ms. Arletta Clements
- Dr. Claudia Crump
- Dr. Timothy M. Ruff & Ms. Laura Hansen Dean
- Mr. and Mrs. Michael L. Douglas
- Ms. Loretta Ellenbrand\*
- Dyan and Alan Feller
- Mr. Jerry K. Finn
- Mr. Darin Fox
- Dr. Fay Greckel
- Dr. Elsa M. Haddad
- Dr. and Mrs. James E. Hollenbeck
- Dr. and Mrs. Joe Jacobi
- Mrs. Wilma Howard Klein
- - Mr. Henry J. (Hank)\* and Mrs. Wilma Howard Klein
- - Mr. Robert M. Knox\*
- Mr. and Mrs. Robert L. Krall
- Mr. Norman Kratz\*
- Mr. Casey and Mrs. Dora\* LaDuke
- Mr. Ray Lewis
- Mr. Kevin and Mrs. Natalie Nolan
- Ms. Maggie Oster
- Dr. Malcolm and Mrs. Ruth Ann Peel
- Mr. and Mrs. Merrill G. Peter
- Mrs. Margaret Read
- Ms. Donna K. Riley
- Mr. S. Butch Shaw
- Shashi Shivananjaiah
- Mr. Gary L. Shourds and Dr. Rita Hudson Shourds
- Ms. Linda S. Speed
- Mrs. Alice L. Steele
- Mr. Walt Stern, Jr.
- Ms. Mary and Mr. William\* Thompson
- Mr. Michael D. Waiz
- Mr. and Mrs. Robert Walker
- Mr. and Mrs. James B. Wathen
- Mr. Laurence P. Wittlig\*

### Anonymous Donors (6)

\* Legacy Fulfilled

### ● NEW fund listing

## Our Donors

We want to take a moment here to thank each of our supporters and donors. Throughout 2015, we received gifts from many people who support our vision and mission to build enduring charitable resources to positively impact our communities. Without your generosity the Community Foundation wouldn't be able to impact the lives of so many throughout this region. Thank you.

- Mr. and Mrs. Kenny Adams
- Advanced Payroll Systems, Inc.
- Mr. and Mrs. Wilton J. Aebersold
- Albro Enterprises, LLC
- American Legion, Bonnie Sloan Post #28
- Mr. and Mrs. Eugene Andert
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- Mr. and Mrs. Gregory Andres
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- Clark County 4-H Adult Leaders
- Clark County REMC
- Clarksville Community School Corporation
- Clarksville Community Schools as Agent for Faculty and Staff
- Ms. Arletta Clements
- Cody Family LLC
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- Mr. Patrick T. Cody
- Mr. Shane Cody
- Ms. Kerri Cokeley
- Community First Holdings, Inc.
- Ms. Aimee Conrad-Hill
- Ms. Lisa A. Cook
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- Ms. Sally Newkirk
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- Your Community Bank
- Your Community Bank Charitable Foundation
- Ms. Doris Zirkle
- Mrs. Joseph Zur Schmiede
- 5 Anonymous Donors



Members of the Board of Directors, left to right, standing: Susie Stewart, David Hussung, Kyle Ridout, Julie Larner, J. Terrence Cody, Kevin Cecil, Gary Banet, Linda Speed (ex-officio), Seated, left to right: Jessica Bergman, Bill Hanson, R. Gregory Neely, Jorge Lanz, Bill White, Sue Sanders (Not pictured: Phillip Beaman, Jay Conner, Larry Ricke)

### Board of Directors

The members of the Board of Directors of the Community Foundation of Southern Indiana assure that the Foundation's resources are used efficiently and effectively to accomplish our vision and mission.

Susie Stewart, *Chair*  
 Phillip Beaman, *Vice-Chair*  
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Jessica Bergman  
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Jorge Lanz  
 R. Gregory Neely  
 Larry Ricke  
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 Sue Sanders  
 Linda Speed, *President and CEO, ex-officio*

### Staff Members



Linda Speed  
*President and CEO*



Melany Wessels  
*Senior Director of Finance and Operations*



Crystal Gunther  
*Director of Community Philanthropy*



Kenton Wooden  
*Director of Community Outreach*



Margaret Brinkworth  
*Grants and Scholarship Associate*



Aimee Conrad-Hill  
*Administrative and Database Assistant*

## Vision

To be the partner and trusted resource for philanthropy in our community, providing stewardship of charitable intent so the impact of generosity will last for generations.

## Mission

To build enduring charitable resources used to positively impact our community by:

- Serving as a partner and resource for donors, their advisors, and not-for-profit organizations
- Making it simple for donors to fulfill their individual goals in giving back
  - Providing stewardship of donor gifts and charitable intent for generations to come
  - Fulfilling a leadership role on important community issues

## Values

**Integrity/Ethical Behavior**  
- Do the right thing every time

**Stewardship**  
- Preserve donor intent and charitable value across generations

**Excellence**  
- Exceed expectations in all we do

**Passion**  
- Love what we do; believe what we do makes a real difference

**Leadership**  
- Know our community and its needs; act on that knowledge

**Donor Service**  
- Create an environment of personal engagement and fulfillment of charitable wishes for each donor

The Community Foundation of Southern Indiana was founded in 1991 as the region's partner, resource and steward in philanthropy. The Foundation manages \$30 million in charitable assets and administers over 230 individual funds – each supporting the unique charitable intent of the donor who established the fund. To date, the Foundation has awarded over \$23 million in grants and scholarships and is a National Standards certified community foundation.



Community Foundation  
of Southern Indiana  
*Ensuring generosity. Forever.™*

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