



What's your **LEGACY?**
FOUNDATION

LAKE COUNTY'S
COMMUNITY FOUNDATION



There are certain things that are fundamental to human fulfillment. The essence of these needs is captured in the phrase 'to live, to love, to learn, to leave a



LEGACY'

—Stephen Covey

November 2010

DEAR FRIENDS OF LEGACY FOUNDATION:

Is this an annual report, or what?

Contained within this binder you will find numerous sections tabbed and referenced for your benefit. In fact, we produced this binder with you, the user, in mind. We have designed this binder to serve as an actual tool for you to use in your philanthropic pursuits. This binder is a tangible example of how Legacy Foundation serves the Lake County community as its philanthropic resource and partner.

We have attempted to accomplish many things with this work—reflective of the many things that Legacy represents to the community, including:

AUDITED FINANCIALS A real statement of our fiscal reliability and stability.

HONOR ROLL OF DONORS, PARTNERS, & FRIENDS We thank those who have supported, engaged in, and involved themselves with the Foundation. Gifts are our lifeblood.

FUND HIGHLIGHTS Scholarship and program funding is one of our core operating platforms. These funds are the energy for change in our community.

LEGACY INITIATIVES AND OPPORTUNITIES We offer numerous options for philanthropic participation, a tenet in the heart and soul of our mission.

FORMS, GUIDELINES, TIPS, GLOSSARY We want to be your philanthropic resource on many levels, and these little aids are a great way for our partnership to grow and be productive.

PEOPLE This is our business—The People Business—and we are blessed to work closely with talented staff, generous and committed board members, and selfless committee members.

Update

PROJECT 100% The Legacy Foundation Board of Directors chose to become a lead agent, along with other key collaborators in Lake County, to address the educational needs of our community. This is a brief snapshot of the key action steps to date.

I hope that you utilize this binder knowing that Legacy Foundation remains your philanthropic partner, resource, fiscal agent, board source, facilitator, grantor, sounding board, and leader. Legacy Foundation is committed to the people, communities, and organizations of Lake County.

Give to Live –



Harry J. Vande Velde III

P.S. Many thanks to Comunicato Strategic Consulting, V as in Victor Marketing + Design, and Lithographic Communications for their partnership and service during the creation of this publication.

DEAR FRIENDS:

Change is a constant in our lives. The board of directors and staff of Legacy Foundation truly feel honored to be part of an organization that provides stability in the midst of change, a tie that binds our community together through philanthropy. The constancies are the gifts of each and every donor; the many individual charitable funds established by our community that provide philanthropic vitality for Lake County; and the connections with our nonprofit partners.

The themes of our past reports reflect the consistent growth of Legacy Foundation and the partnerships forged for working together and celebrating community in the truest sense. Our nonprofit partners do the important work in our community, and through the power of the endowment funds established at Legacy Foundation, we provide a tie to future generations.

In the past year, as we listened to our donors and our community, Legacy Foundation developed a strategic direction and vision, Project 100%. Harnessing our charitable and people resources, we are working to build strong connections across our communities, bring best practices in after school programs, and improve the communication of opportunities for our youth to graduate from high school with greater opportunity for a bright future.

Legacy Foundation links us all together in one community. Legacy Foundation belongs to each and every one of us. In this year of change for Legacy Foundation, we are confident as we look forward to new and promising relationships to be forged in the coming years. This report is a celebration of working better together.



Margot L. Clark
Chair, 2009-2010



Robert J. Nickovich
Chair, 2010-2011



Nancy K. Johnson
President/Executive Director, October 1999-June 2010



Harry J. Vande Velde III
President and Chief Executive Officer, effective July 1, 2010

OUR MISSION STATEMENT

The mission of Legacy Foundation is to encourage philanthropy, support good works, and inspire leadership in Lake County.

DID YOU KNOW THAT LEGACY FOUNDATION

- is a permanent philanthropic endowment to benefit the people and communities of Lake County, Indiana?
- was founded in 1992 by a group of community leaders?
- manages assets of more than \$32 million as of June 30, 2010?
- is governed by a volunteer board of directors representing a diverse spectrum of business, education, and the nonprofit and public sectors from throughout Lake County?
- distributed nearly \$2 million in grants and scholarships to hundreds of organizations and individuals during the 2009-10 fiscal year?
- has a primary strategic initiative: Project 100%? It champions educational attainment for students in Lake County. The goal is for every student to achieve a high school diploma and become college- or career-bound.

Read on to learn more or visit our website at www.legacyfoundationlakecounty.org

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Accurate Hearing Aid Services
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Ms. Trish Alt
Amturf Enterprises, LLC
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Ancilla Systems
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Ms. Donna M. Wilson
Ms. Catherine Wiseman
Mr. and Mrs. Keith Wolak
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Mrs. Mary Ellen Yast
YMCA of Hammond Area
Ms. Pamela Meyer Yttri
YWCA of Gary
Ms. Gina C. Zambori
Zels, LLC

Every effort has been made to ensure accuracy of this report. Please let us know of any errors and accept our apology.

HOLIDAY GIFT MATCHING PROGRAM

Legacy Foundation's Board of Directors offered a matching gift program in December, 2009. Donors gave to a participating agency endowment fund and Legacy Foundation matched the gift dollar for dollar up to \$1,000. The following organizations benefited from this matching gift campaign for a combined total of \$10,225.

Boys & Girls Clubs of NWI Fund
Brink Fund for Nazareth Home
Campagna Academy Fund
Chorus Angelorum Endowment Fund
Catholic Charities Diocese of Gary Fund
Dunes Learning Center Fund
Dunes Learning Center Education Fund
NWI Habitat for Humanity Fund
Shirley Heinze Land Trust Fund
Hospice of the Calumet Area Endowment Fund
Lake Area United Way Fund
Lake County Public Library Fund
Lowell Public Library Endowment Fund
Meals on Wheels of NWI Fund
Planned Parenthood of Lake and Porter County Fund
South Shore Arts Fund
Indiana Pro Bono thru the Palmer C. Singleton, Jr. Fund
Salvation Army of Lake County Fund
Save the Dunes Conservation Fund
Taltree Arboretum & Gardens Fund
TradeWinds Endowment Fund
Visiting Nurse Endowment Fund benefiting
 Center for Possibilities, Haven House, Lupus,
 Meals on Wheels, Sojourner Truth House and
 St. Anthony Hospital
Endowment Fund of YMCA of the Hammond Area
YWCA of Gary Fund

2009-2010 FINANCIALS

Legacy Foundation, Inc.

Summarized Financial Information

As of June 30, 2010

	June 30, 2010
Total Assets	<u>\$32,921,125</u>
Custodial funds and other liabilities	\$9,095,481
Total Net Assets	<u>\$23,825,644</u>
	\$32,921,125
	Year ended
	June 30, 2010
Revenues	
Contributions	\$2,282,347
Investment return, net	\$3,184,188
Administrative income	<u>\$350,573</u>
	\$5,817,108
Expenses	
Grants	\$1,618,245
Other programs	\$438,491
Management and general	\$187,219
Fundraising	<u>\$243,042</u>
	<u>\$2,486,997</u>
	\$3,330,111

The above represents condensed financial information as of June 30, 2010, and for the year then ended. Audited financial statements are available upon request.

The contributions of \$2,282,347 do not reflect \$1,926,147 contributed during the fiscal year to endowment and other funds shown as liabilities for financial statement purposes.

The grants of \$1,618,245 do not reflect \$416,327 of grants disbursed during the fiscal year from endowment and other funds shown as liabilities for financial statement purposes.

REPORT OF INDEPENDENT AUDITORS

To the Board of Directors of the
Legacy Foundation, Inc.
Merrillville, Indiana

We have audited the accompanying statement of financial position of the Legacy Foundation, Inc. (the "Foundation") as of June 30, 2010, and the related statements of activities and cash flows for the year then ended. These financial statements are the responsibility of Foundation's management. Our responsibility is to express an opinion on these financial statements based on our audit.

We conducted our audit in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free of material misstatement. An audit includes examining, on a test basis, evidence supporting the amounts and disclosures in the financial statements. An audit also includes assessing the accounting principles used and significant estimates made by management, as well as evaluating the overall financial statement presentation. We believe that our audit provides a reasonable basis for our opinion.

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of the Foundation as of June 30, 2010, and the changes in its net assets and its cash flows for the year then ended in conformity with accounting principles generally accepted in the United States of America.

We also audited the adjustments described in Note 2 that were applied to restate the beginning balances in these financial statements as of July 1, 2009. In our opinion, such adjustments are appropriate and have been properly applied.

CPAs / ADVISORS



September 28, 2010



This land, this water, this air,
this planet—this is our **LEGACY** to
our young.

—Paul Tsongas

ARTS & CULTURE

|ahrts | –noun

1. a branch of learning or university study, esp. one of the fine arts or the humanities, as music, philosophy, or literature

2. the principles or methods governing any craft or branch of learning

|kuhl-cher | –noun

the quality in a person or society that arises from a concern for what is regarded as excellent in arts, letters, manners, scholarly pursuits, etc.

The arts add richness to a community, enhance the quality of life and contribute to social and cultural diversity. Legacy Foundation proudly supports the expansion of artistic knowledge and discovery. We help sustain the cultural life of Lake County through support of arts education including performing and visual arts programs for all ages.

View all of our current Arts and Culture grants in this same color section in the “Grants & Scholarships” tab.

ARTS & CULTURE FUNDS

Chorus Angelorum Endowment Fund

Gary and Sandy Neale Fund

Howarth/NIAA Annuity Fund

Jack and Sara Dietrich Fund

Mabel McCants/NWI Symphony Fund

Norma J. and John M. Cain, Jr. Fund

Orval O. and Margaret Haag Salon Show Fund

Richard W. and Wanda L. Gardner Endowment Fund

South Shore Arts Fund

South Shore Arts Regional Award for Young Artists Fund

South Shore Arts Symphony Advancement Fund

Southlake Children's Choir

The Donald R. & Violet Hayes Wray Memorial Endowment
for the NWI Symphony

Van Eekeren Family Scholarship Fund

COMMUNITY DEVELOP MENT

l kuh-*myoo*-ni-tee l –noun

a social group of any size whose members reside in a specific locality, share government, and often have a common cultural and historical heritage

l dih-*ve*l/-uhp-muhnt l –noun

the act or process of developing; growth; progress

We, at Legacy Foundation, believe in the power of all citizens to affect change in their own communities. We support the civic, business and nonprofit leaders, educators, activists, and involved individuals who work together to improve various aspects of communities throughout Lake County.

From improving housing to preventing youth violence, view all of our current Community Development grants in this same color section in the "Grants & Scholarships" tab.

COMMUNITY DEVELOPMENT FUNDS

2076 Tri-Centennial Memorial Fund

Great Lake Award Fund

Hammond Community Corporation, Inc. Endowment Fund

Hammond Community Corporation, Inc. Fund

Hobart Community Fund—sponsored by HIEDC

Kreitzburg Cemetery Fund

Maria M. Reiner Senior Citizens Trust

Merrillville Parks and Recreation Fund

Miller Community Fund

NWI Habitat or Humanity Fund

Palmer C. Singleton Jr. Fund

South Shore Future Leaders in Philanthropy Fund

Town of Dyer Community Foundation Fund

Whiting/Robertsdale Comm. Improvement Corp. Endowment Fund

Youth in Philanthropy Fund

COMMUNITY

! kuh-*myoo*-ni-tee ! –noun

a social group of any size whose members reside in a specific locality, share government, and often have a common cultural and historical heritage

Legacy Foundation's very existence is based on the notion of community: a shared heritage. A community foundation is composed primarily of funds established by many separate donors for the long-term, diverse charitable benefit of the residents of a defined geographic area. By establishing funds through the Legacy Foundation, the listed individuals, families and organizations have ensured they will benefit Lake County residents for generations to come.

COMMUNITY FUNDS

American Savings FSB Fund
Beth Radigan Memorial Fund
Betty J. and Dick J. Sterk Fund
Catherine and Calvin Bellamy Fund
Catherine Riley Boege Community Fund
Centennial Fund
Chase Fund
Cyril Sandala Fund
Dean and Barbara White Fund
Francis Meyer Family Fund
HFS Bank Fund
Honors and Tributes Fund
Ispat Inland Inc. Fund
Jack S. and Frances S. Killen Fund
James H. and Mary Ann Greiner Fund
James L. and Prudence Dandurand Fund
Lake County Community Fund
Leonard and Mildred Millies Fund
Louise and Bancroft Yarrington Fund
Memorial Fund
Morrow Family Fund
Nancy and Allen Johnson Fund
Nicholas J. Pangere Memorial Fund
Robert and Barbara Gasser Fund
Ruth Cornwell Fund
Webster Cornwell Fund
Wilbert and Olga Seehausen Fund
William and Diane Payne Fund

LIBRARY FUNDS

Hammond Public Library Fund
Jerome J. Gross and Dorothy J. Gross Fund
Lake County Public Library Fund
Lowell Public Library Endowment Fund
Ruth E. Cornwell Fund

DONOR ADVISED

l doh-ner l –noun

a person who gives property by gift, legacy, or devise, or who confers a power of appointment

l ad-vahyzd l –noun

informed; apprised

Legacy Foundation administers numerous donor advised funds for individuals, families and organizations that have established these vehicles to manage their charitable donations. The funds are easy to establish, flexible, and give the original contributors the opportunity to stay involved in where their dollars go to work in the community.

View all the current grants made by donor advised funds managed through Legacy Foundation in this same color section in the “Grants & Scholarships” tab.

DONOR ADVISED FUNDS

Bernard Levenberg Donor Advised Fund
Betty and Dick Sterk Donor Advised Fund
Chris and Dede Morrow Fund
Clare and Lucy Oesterle Fund
Dennis and Amy Han Donor Advised Fund
Fredricka Cooper Davidson Advised Fund
George Uzelac & Associates, Inc. Fund
Hobart Anonymous Donor Fund
John S. & James L. Knight Fund at Legacy Foundation
Mathias A. & Ruth A. Kerger Donor Advised Fund
Marjorie A. Mills Fund
Mary Anne Hannah Fund
Peoples Bank Fund
Thomas Malsch Donor Advised Fund
Tom Sourlis and Sue Eleuterio Donor Advised Fund
Pamela Meyer Yttri Donor Advised Fund

EDUCATION

l ej-oo-key-shuhn l –noun

1. the act or process of imparting or acquiring general knowledge, developing the powers of reasoning and judgment, and generally of preparing oneself or others intellectually for mature life

2. a degree, level, or kind of schooling

From the federal government to movie producers to Indiana’s governor, many voices are calling for higher standards for America’s schools to increase our country’s global competitiveness. Legacy Foundation has made educational attainment its major strategic focus through Project 100%, envisioning a future in which every young person in Lake County achieves a high school diploma and is college- or career-bound.

The people and organizations of Lake County support this vision with a wide range of funds, grants and scholarships administered through Legacy Foundation. Students throughout the county gain new learning resources, innovative experiences, improved after-school programs, and access to technology via this funding.

View all our current Education grants in this same color section in the “Grants & Scholarships” tab.

EDUCATION FUNDS

A Bunch of Responsible Guys Fund
ArcelorMittal Elementary School Math & Science Fund
Bank Calumet Fund (Calumet College)
Calumet College Fund
Calumet College of St. Joseph Endowment Fund
Challenger Learning Center of NWI Endowment Fund
Challenger Spark Your Imagination Fund
Challenger/ St. Mary's--Griffith Fund
Challenger/Griffith School Corporation--3rd grade fund
Challenger/Griffith School Corporation Challenger Fund
Challenger/Highland School Corporation Endowment Fund
Challenger/Hobart School Corporation Fund
Challenger/Lake Station School Corporation Challenger Fund
Challenger/Merrillville School Corporation
Lisa Austgen Challenger Fund
Webster Cornwell Challenger Learning Center Op. Fund
Chase Fund (Calumet College)
Chase Fund (Ivy Tech State College)
Chase Fund 2 (Ivy Tech State College)
College Readiness Fund (Lumina)
College Readiness Endowment Fund
Diane and Terry Eich Fund
Exploring Our Community Fund
Forging Futures Fund
Gloria Hubaceck Duckworth Fund
Hobart Educational Foundation
Jerome J. Gross and Dorothy J. Gross Fund
Junior Achievement (Northwest Indiana) Fund
Lake Central Education Foundation Fund
Lake County Literacy Fund
Lilly Endowment Community Scholarship Promotional Grant Fund
Merrillville Breakfast Kiwanis Club Educational Attainment Fund
Milton & Ruby McClendon Memorial Education Fund
Parents As Teachers Hammond, Lake County
Raymond Keilman Gift Annuity Fund for Bishop Noll
Rotary Club of Gary Fund
The Challenger/Columbia Teacher Fund
USX Foundation Fund (Ivy Tech)
Valparaiso University Fund



A mother works with her child during a Parents as Teachers of Lake County event. Legacy Foundation supports this nationally acclaimed early childhood education and parent support program through various grants.

ENVIRONMENT

| en-*vahy*-ruhn-muhnt | –noun

1. the air, water, minerals, organisms, and all other external factors surrounding and affecting a given organism at any time

2. the social and cultural forces that shape the life of a person or a population

Northwest Indiana boasts miles of natural assets, from the beautiful Lake Michigan shoreline to prairie savannahs. Legacy Foundation partners with donors to support organizations working to minimize environmental impacts, preserve natural areas, and educate the public about “green” initiatives.

View all our current Environmental grants in this same color section in the “Grants & Scholarships” tab.

ENVIRONMENT FUNDS

Association for the Wolf Lake Initiative Fund

AWLI Land Trust Fund

Calumet Watersheds Coalition

Dunes Environmental Learning Center Fund

Dunes Environmental Learning Center Tuition Asst. Fund

Dunes Learning Center Education Fund

Environmental Fund for Lake County

Great Lakes Aquatic Habitat Fund

Great Lakes Environmental Collaborative Fund

Save the Dunes Conservation Fund

Shirley Heinze Land Trust Fund

Taltree Arboretum and Gardens Fund

HEALTH & HUMAN SERVICES

Health | –noun

the general condition of the body or mind with reference to soundness and vigor

Health & Human Services | –noun

programs or facilities for meeting basic health, welfare, and other needs of a society or group, as of the poor, sick, or elderly

Everyone plays a role in improving the health and well-being of fellow citizens. Through Health & Human Services funds, Legacy Foundation supports food banks, senior citizen programs, health agencies, and a range of other organizations serving people's needs throughout Lake County.

View all our current Health and Human Services grants in this same color section in the "Grants & Scholarships" tab.

HEALTH & HUMAN SERVICES FUNDS

Bryce Scott Handley Memorial Fund
Catholic Charities Diocese of Gary, Inc.
Center for Possibilities Fund
Disaster Relief Fund
Dr. Leo & Arlene Cooper Fund for Catholic Charities
Dr. Leo & Arlene Cooper Fund for Nazareth Home
Elsie Kerr Meyer & Francis D. Meyer—Salvation Army of Lake County (Indiana)
Franciscan Communities, Inc.—St. Anthony Campus Fund
Frank Wright Memorial Fund
Friends of Planned Parenthood Lake and Porter County
Good Samaritan Endowment Fund of Lake County
Hospice of the Calumet Area Endowment Fund
Humane Society of the Calumet Area, Inc. Fund
James A. Gammon Foundation
Jerome J. Gross and Dorothy J. Gross Fund
Jerome Longawa Gift Annuity Fund for benefit of Catholic Charities of the Diocese of Gary
Lake Area United Way Fund
Lake County Foundation for the Retarded Fund
Mabel McCants/Planned Parenthood Fund
Meals on Wheels of NW Indiana, Inc. Fund
Olga C. and William H. Brinkman Fund—Nazareth Home
Robert & Nancy Anadell Fund
Salvation Army of Lake County Fund
St. Joseph Medical Center for Nazareth Home
St. Anthony Medical Center Fund
Thomas & Joanne Nastoff Fund
Thomas Ray Crowel Fund
Trade Winds Endowment Fund
Visiting Nurse Endowment Fund
Womenade Fund

RELIGIOUS

ri-/ij-uhs | –adjective

1. of, pertaining to, or concerned with religion

Individuals and churches that wish to designate donations to a particular religious institution or cause have set up funds through Legacy Foundation. For information on setting up a fund to benefit your institution with a religious affiliation, contact us.

RELIGIOUS FUNDS

Betty Dye Memorial Fund for the benefit of Ridge United Methodist Church

Catholic Foundation Bishop Grutka Scholarship Fund for North

American College

Catholic Foundation Catholic Charities, Diocese of Gary

Catholic Foundation Diocese of Gary Scholarship Fund for

Andreas High School

Catholic Foundation Diocese of Gary Scholarship Fund for

Bishop Noll Institute

Catholic Foundation Diocese of Gary Seminarian Fund

Catholic Foundation Diocese of Gary St. Thomas More School Endowment

Catholic Foundation Joseph Hagenow/Justin Tylka Memorial

Scholarship Endowment

Catholic Foundation Operating Fund

Catholic Foundation St. Matthias Parish Religious Education Fund

St. John the Baptist Church Fund

St. John the Baptist Church Organ Fund

Westminster Presbyterian Church Fund

SCHOLARSHIPS

l skol-er-ship l –noun

a sum of money or other aid granted to a student, because of merit, need, etc., to pursue his or her studies

By the time they prepare to graduate high school, Northwest Indiana's best and brightest students have demonstrated outstanding academic performance, leadership, community involvement and success in extracurricular activities. Scholarships offer ways to recognize the many achievements of young people, help students realize their dreams of attending college, and leverage the ability of the community foundation to enhance the quality of life and raise the level of educational attainment in our community.

View all our current Scholarships in this same color section in the "Grants & Scholarships" tab. Scholarships offered through Legacy Foundation have a wide range of deadlines. It is recommended that students contact our office for specifics at 219.736.1880 or our website at www.legacyfoundationlakeco.org/scholarships

SCHOLARSHIP FUNDS

ArcelorMittal Scholarship Fund
Arnulfo H. Medellin Memorial Scholarship Fund
Barbara Miller Meeker Art Scholarship Fund
Bi-Centennial Memorial Scholarship Fund
Broadway Scholarship Fund
Cynthia R. and Mamon Powers, Jr. Scholarship Fund
D. J. & Rose Nidetz Scholarship Fund
Donna K. Yundt Memorial Scholarship Fund
Dr. John Maniotes Scholarship Fund
Fred & Louise Latshaw Scholarship Fund
Hammond City Council Scholarship Endowment Fund
Hammond City Council Scholarship Fund
Herbert R. Kocher Memorial Scholarship Fund
IBEW Local Union #697 Memorial Scholarship Fund
Ispat Inland Scholarship Fund
John V. & George Primich Family Scholarship Fund
Joseph T. Morrow Urban League Scholarship Fund
Joshua Benjamin Cohen Memorial Scholarship Fund
June Pangburn Memorial Scholarship Fund
Klare E. and Marvin L. Anderson Scholarship Fund
Lake County Bar Association Scholarship Fund
Lake County Athletic Officials Association Memorial Scholarship Fund
Legacy Scholarship Fund
Legends Scholarship Fund
Nancy J. Pinnick Scholarship
NFL/Jeanette Winters Memorial Scholarship Fund
Patrick Lindsey Memorial Scholarship Fund
Robert L. Burdan Memorial Scholarship Fund
Roger Begnoche Scholarship Fund
Russ Deal Memorial Football Scholarship Fund
Schrage Family Scholarship Foundation Fund
Sengupta Family Scholarship Fund
St. Anthony Purdue University Calumet Scholarship Fund
The Dr. John T. Scully Medical Scholarship Fund
The Dr. R.T. White Scholarship Foundation Fund
Thomas & Joanne Nastoff Scholarship Fund
W. James Spicer Scholarship Fund
Webster Cornwell Scholarship Fund
Whiting Refinery R.E.P.E.A. Scholarship Fund
William J. Moran Indiana University Law School Scholarship Fund
William J. & Roseann Quilling Scholarship Fund

YOUTH

| youth | –noun

1. the time of being young; early life

2. the appearance, freshness, vigor, spirit, etc., characteristic of one who is young

Youth represent the powerful potential of our future. Legacy Foundation supports programs lifting up youth, providing resources to families with young children and giving kids opportunities to explore their world.

View all our current grants benefitting Lake County's youth in this same color section in the "Grants & Scholarships" tab.

YOUTH FUNDS

Austgen Family Foundation Fund "In Memory of Ronald E. Austgen"

Dean White Charities Fund

Calumet Council Boy Scouts of America Fund

Crisis Center Inc. Endowment Fund

Officer Jerry Volom D.A.R.E. Fund

Drifting Dunes Girl Scout Council Endowment Fund

EASE Fund

Glen E. Bacus Fund

Gwendolyn Sargent Fund for East Chicago Katherine House

Boys & Girls Club

Hobart Family YMCA Endowment Fund

Campagna Academy, Inc. Fund

Hammond Youth Golf Academy Endowment Fund

Boys & Girls Clubs of Northwest Indiana Fund

Lake County Youth Fund

Marian Berry Scholarship Fund–YWCA

Ruth Cornwell/Boys & Girls Club–Hammond Club

Seehausen/Boys & Girls Club of NWI Fund

Endowment Fund of YMCA of the Hammond Area

YWCA of Gary Fund



Participants in the College Mentors for Kids program at Purdue University Calumet are proud of the derby car they built together. A Legacy Foundation grant supported the local chapter of this innovative nonprofit that pairs first through sixth graders with a college student mentor on a college campus for weekly activities focused on higher education, culture and diversity, and community service.

LEGACY FOUNDATION OPERATING FUNDS

l leg-uh-see foun-dey-shuhn l –noun

Lake County's community foundation that encourages philanthropy, supports good works and inspires leadership

l op-uh-rey-ting fuhnds l –noun

a supply of money or pecuniary resources used or engaged in performing operations

Operating endowment funds support the work of the Legacy Foundation forever by providing grants to the foundation's operating budget. Donors express their commitment to our ongoing efforts in Lake County by making gifts to these funds.

LEGACY FOUNDATION OPERATING FUNDS

NIPSCO Endowment Fund

Operating Fund

Legacy Operating Reserve Fund

Unrestricted Operating Endowment Fund

Mary G. White Fund

THE LEGACY SOCIETY

l leg-uh-see suh-sahy-i-tee l –noun

an organized group of persons associated together to honor those who have created a fund at or left a gift for Legacy Foundation through their estate plan

Please email or contact us if your name should be added to this list or if our staff can provide charitable planning information or assistance as you consider your estate plan.

PHONE

219.736.1880

ONLINE

www.legacyfoundationlakeco.org

EMAIL

legacy@legacyfoundationlakeco.org

THE LEGACY SOCIETY

Robert and Nancy Anadell
Anonymous
Estate of Lisa Austgen
Mr. Glen E. Bacus
Mr. and Mrs. Calvin Bellamy
Ms. Catherine Boege
Mr. John M. Cain, III
Mr. and Mrs. Robert L. Champion
Mr. and Mrs. Glenn H. Clark
Mr. and Mrs. Arthur Collins
Mrs. Ruth Cornwell
Mr. and Mrs. Richard W. Gardner
Mr. and Mrs. Robert Gasser
Estate of Dorothy Gross
Mr. and Mrs. Thomas Howarth
Gloria Hubacek Duckworth Trust
Allen and Nancy Johnson
Ms. Roni Johnson
Richard and Sylvia Komyatte
Ms. Carol Kutak
Ms. Barbara M. Meeker
Thomas and Joanne Nastoff
Estate of Alice Rogers
Mr. Verne P. Seehausen, CPA
Ms. Lynette M. Stephens
Estate of Martha L. Woodward
Ms. Pamela Meyer Yttri

GREAT LAKE AWARD INITIATIVE

l greyt leyks uh-wawrd ih-nish-ee-uh-tiv l –noun
an introductory act or step focusing on flexibility and perfecting the roles that each of us play in creating and sustaining robust nonprofit organizations

Participating organizations had the opportunity to:

- Complete an organizational self-assessment
- Select from a menu of seven training events
- Work with nonprofit leaders as peer mentors
- Be awarded “Make It Happen” Grant dollars (up to \$1,000 per organization)
- Qualify to compete for a 2013 Great Lake Award for Excellence in Nonprofit Management



GREAT LAKE AWARD INITIATIVE

In 2010, the following Great Lake Award Initiative participants focused on “Thriving in Trying Times”:

Books Brushes & Bands for Education
Checkmate Academy
Drexel Foundation for Education
Gary Neighborhood Services
Habitat for Humanity of Northwest Indiana
Hammond Education Foundation
Indiana Writers Consortium
Meals on Wheels of Northwest Indiana
Parents as Teachers Lake County
Samaritan Counseling Center
Save the Dunes
Sojourner Truth House
St. Jude House
The First Tee of Hammond
Urban League of Northwest Indiana



Chuck Loring, CFRE, a national expert in fundraising and governance consulting to nonprofits, speaks to participants in a 2010 Great Lake Award Initiative working session for Lake County nonprofit organizations.

To learn how your organization could participate in the Great Lake Award Initiative, contact Cara Spicer, Legacy Foundation Program Officer, at (219) 736-1880 or cspicer@legacyfoundationlakeco.org.

**If we did all we were capable of doing,
we would literally astonish ourselves.**

–Thomas Edison



If your actions create a **LEGACY** that inspires others to dream more, learn more, do more and become more, then you are an excellent leader.

-Dolly Parton

ARTS & CULTURE

LAKE COUNTY COMMUNITY FUND

Northwest Indiana Symphony Orchestra..... \$2,500.00

Funding for free tickets for Lake County high school music students in an effort to engage younger audiences, serve the arts education needs of the Lake County school communities, and provide a positive social networking experience for the students

South Shore Dance Alliance.....\$8,500.00

A pilot program to provide a safe, productive, after school destination. Youth attend a variety of classes in creative disciplines and complete school work in the tutoring area. Family participation is encouraged in all activities

MARIA M. REINER SENIOR CITIZENS TRUST

School City of Hobart \$3,000.00

Provide refreshments for the Choral Concert and Jazz Band Concert performances for Hobart senior citizens

School City of Hobart \$7,200.00

Support attendance of Hobart Seniors to theatre presentation and Christmas Choral Concert at Hobart High School

DONOR ADVISED GRANTS

Chris and Dede Morrow Fund

South Shore Arts..... \$5,000.00

Matching pledge for expanded programming

Miller Community Fund

Wirt Emerson School for the Visual & Performing Arts \$1,200.00

Close-up program support

Tom Surlis and Sue Eleuterio Donor Advised Fund

South Shore Arts..... \$40,000.00

ARTS & CULTURE

ENDOWMENT DISTRIBUTIONS

Chorus Angelorum

Chorus Angelorum Endowment Fund.....\$706



A couple enjoy refreshments, a theatre presentation and a holiday choral concert at Hobart High School in December 2009. The attendance by Hobart seniors was underwritten by the Maria M. Reiner Senior Citizens Trust.

COMMUNITY DEVELOPMENT

LAKE COUNTY COMMUNITY FUND

Boys & Girls Clubs of Northwest Indiana \$600.00

Funds provided for a facilitator to assist COFFY in the creation of a logic model at annual retreat

Gary Neighborhood Services, Inc. \$7,600.00

To provide support for the administrative structure of COFFY, for the third annual Youth Violence Prevention Conference

GRANTS, Inc. \$250.00

Provide facilitator for collaborative event, "Recruiting New Board Members"

Metropolitan Planning Council \$7,500.00

To sustain and advance existing Employer-Assisted Housing programs for Northwest Indiana by linking them to key policy and development initiatives, to provide technical assistance to entities that will champion and facilitate employer outreach

Quality of Life Council \$1,000.00

Support annual membership campaign

GREAT LAKE AWARD FUND

Northwest Indiana Habitat For Humanity \$1,000.00

"Make It Happen" grant to increase awareness through a new branding and marketing initiative

COMMUNITY DEVELOPMENT

DONOR ADVISED GRANTS

Betty and Dick Sterk Donor Advised Fund
First United Lutheran Church.....\$100.00
General Operating Support

Mary Anne Hannah Fund
Emmanuel Lutheran Church.....\$1,144.00
General Operating Support

Bernard Levenberg Donor Advised Fund
Jewish Federation of Greater Phoenix\$450.00
Donor advised grant

Marian Berry Scholarship Fund - YWCA
YWCA of Gary\$5,000.00
Marian Berry's Water Babies, free summer swimming classes for infants 6 months to 5 years

Tom Sourlis and Sue Eleuterio Donor Advised Fund
YWCA of Gary\$20,000.00
Donor directed grant

ENDOWMENT DISTRIBUTIONS

St. John the Baptist Catholic Church
St. John the Baptist Church Fund.....\$653.00
St. John the Baptist Church Organ Fund\$653.00

Westminster Presbyterian Church
Westminster Presbyterian Church Fund\$564.00

Lake Area United Way
Lake Area United Way Fund.....\$5,700.00

Hammond Community Corporation, Inc.
Hammond Community Corporation Endowment Fund\$120,000.00

Whiting/Robertsdale Comm. Improvement Corp.
Whiting/Robertsdale Comm. Improvement Corp.
Endowment Fund.....\$2,924.00

EDUCATION

LAKE COUNTY COMMUNITY FUND

Ivy Tech College–Region 01 **\$4,744.00**

To promote interest in science and health career programs through a three-tier youth outreach program

Parents As Teachers of Lake County, Inc. **\$3,375.00**

To explore the possibility of merging with Dunebrook, the provider of Parents as Teachers services in LaPorte County

Our Family Center **\$10,000.00**

Support for after-school tutoring and mentoring for at-risk children 5-18 years old and the expansion of youth leadership program

South Shore Arts **\$15,000.00**

Expand highly successful "Polar Express" art-based first grade literacy program into the second grade curriculum in Hammond, East Chicago, Gary, Lake Station, and Merrillville communities

Teach for America **\$5,000.00**

To support efforts to recruit, select, train, place, and support corps members and alumni

GREAT LAKE AWARD FUND

Drexel Foundation for Educational Excellence, Inc. **\$1,000.00**

"Make It Happen" grant to diversify the organization's fundraising sources

DONOR ADVISED GRANTS

ArcelorMittal Elementary School Math & Science Fund

School City of East Chicago **\$40,000.00**

Proactive grant for education

EDUCATION

DONOR ADVISED GRANTS CON'T

Town of Dyer Community Foundation Fund

Bibich Elementary School	\$100.00
Protsman Elementary School	\$100.00
Kahler Middle School.....	\$100.00
St. Joseph Catholic School.....	\$100.00

For their Accelerated Reading program

Challenger Spark Your Imagination Fund

Challenger Learning Center of Northwest Indiana	\$450.00
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Space Camp Scholarship for a 5th-6th Grade camper and a One Day Theme Camp Scholarship

Beth Radigan Memorial Fund

Challenger Learning Center of Northwest Indiana	\$1,500.00
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Merrillville Breakfast Kiwanis Club Educational Attainment Fund

The Dictionary Project	\$1,020.00
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Dictionary distribution to Merrillville Schools' 3rd grade students

ENDOWMENT DISTRIBUTIONS

Challenger Learning Center of NWI

Challenger Learning Center of NWI Endowment Fund.....	\$816.94
Griffith School Corp. Challenger Fund	\$1,142.00
Highland School Corp. Challenger Fund	\$1,611.00
Hobart School Corp. Challenger Fund	\$889.00
Lake Station School Corp. Challenger Fund.....	\$223.32
Lisa Austgen Challenger Fund	\$20,000.00
Merrillville School Corp. Challenger Fund.....	\$4,500.00
St. Mary's-Griffith Challenger Fund	\$228.00
The Challenger/Columbia Teacher Fund.....	\$13,775.00

ENDOWMENT DISTRIBUTIONS CON'T

Calumet College of St. Joseph

Calumet College of St. Joseph Endowment Fund	\$6,022.00
Bank Calumet Fund (Calumet College).....	\$3,270.00
Chase Fund (Calumet College)	\$3,483.00

Ivy Tech College–Region 01

Chase Fund (Ivy Tech State College).....	\$1,988.00
USX Foundation Fund (Ivy Tech).....	\$1,439.00

Purdue Foundation Calumet

Gloria Hubaceck Duckworth Fund	\$3,371.00
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Valparaiso University

Valparaiso University Fund	\$1,169.00
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Young people receive tutoring and mentoring at Our Family Center in Hammond. A grant from Legacy Foundation's Lake County Community Fund supported the center's programs for at-risk children and the expansion of a youth leadership program.

ENVIRONMENT

LAKE COUNTY COMMUNITY FUND

Heinze Land Trust, Inc...... **\$2,500.00**
To assist with a small parking lot as part of Ivanhoe South Nature Preserve Education and Outreach Initiative

South Shore Clean Cities, Inc. **\$2,500.00**
Support for the presentation of alternative fuels for sustainable transportation at a conference

DONOR ADVISED GRANTS

Miller Community Fund

Dunes Environmental Learning Center **\$1,600.00**
Frog in the Bog Program support

Pamela Meyer Yttri Donor Advised Fund

Taltree Arboretum & Gardens **\$1,000.00**

ENDOWMENT DISTRIBUTION

Heinze Land Trust, Inc.

Shirley Heinze Land Trust Fund **\$859.00**

HEALTH & HUMAN SERVICES

LAKE COUNTY COMMUNITY FUND

Alzheimer's & Dementia Services of Northern Indiana..... \$1,000.00

Assistance with costs associated with services for mailing & printing newsletters and brochures

Catholic Charities of the Diocese of Gary \$4,500.00

Support for pilot program of vision screenings for all 3- to 6-year-old children in elementary and parochial schools in Lake County

South Lake County Community Services, Inc..... \$3,642.00

Update equipment and software purchased in 2005

Arc BRIDGES \$20,000.00

Support for purchase of a lift van

International Institute of LACASA \$6,000.00

Implementation of an Immigration Resource Office in the City of Hammond

Greater Hammond Community Services, Inc. \$5,600.00

Support for purchase and installation of walk-in freezer

GREAT LAKE AWARD FUND

St. Jude House..... \$1,000.00

"Make It Happen" grant for the development of an e-newsletter

Meals on Wheels..... \$1,000.00

"Make It Happen" grant for the creation of a promotional DVD entitled "On The Road"

HEALTH & HUMAN SERVICES

MARIA M. REINER SENIOR CITIZENS TRUST

Health Care Advocacy Group.....\$10,000.00

To support the HAGI Prescription Assistance Program

Hobart Family YMCA.....\$10,000.00

Hobart Senior Citizen Transportation "vouchers for taxi service"

Center for Possibilities Fund

Center for Possibilities.....\$13,000.00

For capital improvements to their facility

DONOR ADVISED GRANTS

Beth Radigan Memorial Fund

Sojourner Truth House\$1,500.00

Hobart Anonymous Donor Fund

Trinity Ev. Lutheran Church and School.....\$10,000.00

Hobart Food Pantry\$7,000.00

Thomas Malsch Donor Advised Fund

Immanuel Presbyterian Church.....\$14,644.95

Tom Surlis and Sue Eleuterio Donor Advised Fund

Planned Parenthood of Indiana, Inc.\$25,000.00

Doctors Without Borders, USA.....\$5,000.00

ENDOWMENT DISTRIBUTIONS

Catholic Charities of the Diocese of Gary

Catholic Charities Diocese of Gary, Inc. \$1,907.00

Catholic Foundation for the Diocese of Gary

Catholic Foundation Diocese of Gary Scholarship Fund for Bishop Noll
Institute \$2,251.00

Center For Possibilities

Center For Possibilities Fund \$13,000.00

Franciscan Communities/St. Anthony Campus

Franciscan Communities, Inc.–St Anthony Campus Fund \$4,844.38

Hospice of the Calumet Area, Inc.

Hospice of the Calumet Area Endowment Fund \$4,852.00

Humane Society Calumet Area, Inc.

Humane Society Calumet Area, Inc. Fund \$7,081.00

Nazareth Home

Olga C. & William H. Brinkman Fund \$99,891.00

Dr. Leo & Arlene Cooper Fund \$164.29

Planned Parenthood of Indiana, Inc.

Friends of Planned Parenthood Lake & Porter County \$219.00

Salvation Army of Lake County

Salvation Army of Lake County Fund \$6,835.00

Samaritan Counseling Center

Good Samaritan Endowment Fund of Lake County \$582.00

St. Anthony Medical Center, Inc.

St. Anthony Medical Center Fund \$206,268.48

Sojourner Truth House

Womenade Fund \$2,000.00

ENDOWMENT DISTRIBUTIONS CON'T

TradeWinds Rehabilitation Center, Inc.
John & Helen Sourlis Endowment Fund.....\$627.00

Center for Possibilities
Haven House
Lupus Foundation of America, Indiana Chapter, Inc.
Meals on Wheels of NW Indiana, Inc.
St. Anthony Hospice
Sojourner Truth House
Visiting Nurse Endowment Fund..... \$500.00 each

COLLEGE READINESS FUND

Communities In Schools of East Chicago	\$15,000.00
Ready2GO—Charting for Success	
Gary Life Education Initiative.....	\$12,500.00
College Readiness in the Classroom	
Geminus Corporation	\$15,000.00
Center for Mentors Mentoring Co-op, Program Management	
Hammond Boys & Girls Club	\$12,500.00
Support to expand participation in the Male Minority Goals for Graduation initiative	
Holistic Community Coalition NFP	\$10,000.00
Project College Bound	
John Will Anderson Boys and Girls Club	\$12,500.00
Enhanced Minority Goals for Graduation Collaborative	
Lake Station Boys & Girls Club.....	\$5,000.00
Preparing Minorities for Degrees in STEM	
Purdue University Calumet	\$10,600.00
Reaching New Students & Parents through PUC's College Readiness Programs	
Salvation Army Gary/Merrillville Corps & Community Center	\$10,000.00
Striving for Excellence in Academics S.E.A. Program	
YWCA of Gary	\$8,250.00
Yes We CAN! Teen Program for Girls	
College Readiness Endowment Fund	\$25,000.00
Set up a College Readiness endowment fund to assist students in perpetuity with college goals	

RECREATION

MARIA M. REINER SENIOR CITIZENS FUND

School City of Hobart \$9,200.00

Support for events for seniors at Hobart High School for five performances/concerts in the 2010/2011 school year

Hobart Family YMCA \$600.00

Support for picnic open to all Hobart seniors prior to a concert in Festival Park

Hobart Family YMCA \$10,000.00

Continued support for successful senior transportation program in Hobart

DONOR ADVISED GRANTS

Miller Community Fund

South Shore Promotions, Inc..... \$3,500.00

Support for Gary's South Shore Air Show

YOUTH

LAKE COUNTY COMMUNITY FUND

Purdue University Calumet \$1,000.00

Host two Discover Nursing Camps for Lake County high school students in 2010

Holistic Community Coalition NFP \$15,000.00

Address academic, socioeconomic and emotional needs of at-risk youth in East Chicago

College Mentors for Kids! Inc. \$2,500.00

Support for the program at the Purdue University Calumet Chapter

Highly Flavored Ministry, Inc..... \$5,000.00

To provide after-school and summer programs that will engage students in organized and well-supervised education

Indiana Bar Foundation \$3,500.00

Support for two pilot projects of the Project Citizen Program in the Gary Community Schools

GREAT LAKE AWARD FUND

Parents As Teachers of Lake County, Inc. \$1,000.00

"Make It Happen" grant proposal to create a "Story Bank" of anecdotes and testimonials from parents, children and others

DONOR ADVISED GRANTS

George Uzelac & Associates, Inc. Fund

Boys & Girls Clubs of Porter County \$193.35

Miller Community Fund

Crisis Center.....\$2,000.00

YOUTH

DONOR ADVISED GRANTS CON'T

Pamela Meyer Yttri Donor Advised Fund
Parents As Teachers of Lake County, Inc.\$10,000.00

Tom Sourlis and Sue Eleuterio Donor Advised Fund
Parents As Teachers of Lake County, Inc.\$54,890.69
Matching Campaign for Donations received

ENDOWMENT DISTRIBUTIONS

Boys & Girls Clubs of NWI
Boys & Girls Clubs of NWI Fund\$13,558.61
Ruth Cornwell/Boys & Girls Club–Hammond Club.....\$8,983.00
Seehausen/Boys & Girls Club of NWI Fund.....\$448.00

Campagna Academy, Inc.
Campagna Academy, Inc. Fund\$1,000.00

Southlake Children's Choir
Southlake Children's Choir Fund.....\$194.24

Lake County Police D.A.R.E. Program
Officer Jerry Volom D.A.R.E Fund\$500.00

LECS PROMOTIONAL GRANT FUND

The National Center for College Costs\$9,500.00
For 2009-10 Programming in Lake County

SCHOLARSHIPS

Roger Begnouche Scholarship was established to encourage a young man to pursue a career in education or nursing at Purdue University Calumet. Named for a mentor and coach of a donor who wished to remain anonymous, this year's recipient is **Timothy Clinton**.

Joshua Benjamin Cohen Memorial Scholarship was created in memory of Joshua Cohen. This renewable scholarship is awarded to graduating students from Valparaiso High School who demonstrate a high standard of leadership, academic performance, athletic performance and financial need. This year's recipients are **Carly Blane** and **Nathan Felton**.

Webster Cornwell Memorial Scholarship was established by Ruth Cornwell in memory of her husband. This four year renewable scholarship is awarded each year to a student graduating from Hammond High School. This year's recipient is **Citlali Meza**.

Hammond Common Council Scholarship is awarded to high school seniors graduating from high schools located in Hammond. The recipients this year are: **Martin Anguiano, Jr., Seth Brown, Jessica Castillo, Eddie Edward III, Anel Garcia, Alan Gogins, Alayna Hale, Raven Hampton, Ranger Hogan, Jessica Lozano, Patricia Moya, Ayanna Riley, Frank Rodriguez, Rose Soto, and Jacob Tapper**.

IBEW Local Union #697 Memorial Scholarship, established in 2002, is awarded in memory of deceased members of IBEW Local #697 and benefits the children of Local #697. The recipients this year are: **Leah Alberson, Hope Asya-Broughton, Christopher Brahos, Lindsey Clemens, Garrison Dixon, Alexander Doctor, Brooke Fargo, Joshua Gaines, Jessica Gallinatti, Hayley Grzych, Megan Hennessee, Trevor Hitt, Maresa James, Elyse Janke, Chelsy Kimes, Matthew Kollada, Robin Martinez, Tiffany Michaels, Joseph Patrick, Benjamin Rose, Marissa Smith, Katherine Soderquist, Ryan Trgovcich, Matthew Wajvoda, Kathleen Wandasiewicz and Julie Wandasiewicz**.

Herbert R. Kocher Memorial Scholarship was established by Mary Kocher in honor and memory of her husband. Herb was a volunteer for the Legacy Foundation, serving on the Investment Committee and as a scholarship interviewer. This scholarship honors Herb's belief in each and every student. This year's recipient is **Ashley Ables**.

Lake County Athletic Officials Association Scholarship is awarded to children of members of the Lake County Athletic Officials Association. The recipients this year are: **Joshua Long** and **Matthew Spurr**.

Lake County Bar Association has been awarding scholarships to law students who are permanent residents of Lake County since 2003. This scholarship is applied to the tuition costs at an accredited law school in Indiana. This year's recipients are **Caitlin Kerr** (Indiana University School of Law), **Ryann Perlinski** (IU Maurer School of Law) and **LaDawn Burnett** (University of Notre Dame Law School).

Fred and Louise Latshaw Scholarship was established by the Board of Directors of the Legacy Foundation in the fall of 2007. It provides scholarships to employees of Lake Area United Way Agencies or employees of a not-for-profit Agency that have an endowment fund with Legacy Foundation to continue their education. This year's recipients are **Angela Dvorak** with Humane Society of the Calumet Area and **April King** with St. Anthony Home.

SCHOLARSHIPS

Legacy Scholarship recipients are nominated by their high schools based upon academic achievement, leadership, service to others, financial need, a written narrative and an interview. This year's recipients and their high schools are: **Ashley Ables** (River Forest High School), **Brittany Brown** (Roosevelt Career and Technology Academy), **Abby Eddlemon** (Calumet High School), **Davonte Frazier** (Lew Wallace S.T.E.M. Academy), **Sage Hill** (Hobart High School), **Samantha Irk** (Gavit High School), **Iman Jenkins** (West Side Leadership Academy), **Ilse Jimenez** (Whiting High School), **Al'Lena Lovelace** (Wirt-Emerson Visual and Performing Arts Academy), **Michael Peschke** (George Rogers Clark High School), **Frank Rodriguez** (Morton High School), **Mladenka Sitnikoski** (Lowell High School), **Frances Sowula** (Edison High School), **Ricardo Vasquez** (Hammond High School), and **Adam Wroughton** (Lake Central High School).

Legends Scholarship is awarded to a student who is attending one of the six educational institutions in Northwest Indiana. It is based upon the four values of the Welcome Center's "Celebrate Northwest Indiana Wall": exploration, courage, creativity and innovation. The recipient this year is **Theresa Elizalde** (Purdue University Calumet).



Lilly Endowment Community Scholarship

This prestigious, full-tuition, renewable scholarship is awarded to graduating seniors of Lake County high schools and is based upon academic achievement, leadership, service to others, financial need, a written narrative and an interview. The recipients this year are: **Antonia Collins** (Bishop Noll Institute), **Evan Jameyfield** (Highland High School), **Ashley Kutemeier** (Crown Point

High School), **Jacob Long** (Griffith Central High School), **Manuel Mendoza** (East Chicago Central High School), **Amber Medwetz** (Merrillville High School), **Kaitlin Rogers** (Hanover Central High School), **Stacey Wierman** (Munster High School), and **Kevin Wojkovich** (Andrean High School).

Patrick Lindsey Memorial Scholarship was created not only to honor Patrick, but to aid graduating minority high school seniors in Lake County, Indiana interested in the fine arts. Patrick was a 'natural' on the piano and organ and his love of music and the arts was apparent as he performed throughout northwest Indiana. This year's scholarship recipient, from Wirt-Emerson School for the Visual and Performing Arts Academy, is **Nya Jones**.





Dr. John Maniotes Scholarship

was awarded for the first time in 2005. This scholarship was established to benefit the children or grandchildren of current employees of Lake County, Indiana at the Government Center in Crown Point or another site. The recipients this year are **Sarah Flores** (pictured on the left) and **Lisa Belzeski**.



Barbara Miller Meeker Art Scholarship

was established by Barbara Meeker, a respected local artist, to encourage Munster High School seniors pursuing the visual arts. This year's recipient is **Joshua Lukoshus**.

William J. Moran Indiana University School Of Law Scholarship

is based on academic standing and financial need and is awarded to a second or third year IU Bloomington law student from Lake, Porter or LaPorte counties. This scholarship was established in memory of William J. Moran. This year's recipient is **Caitlin Kerr**.

Joseph Trent Morrow / Urban League Of Northwest Indiana Scholarship

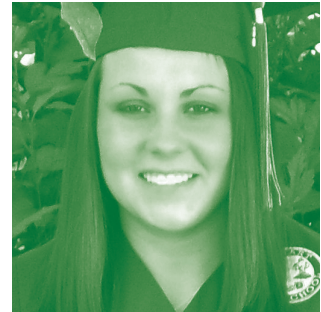
was established in recognition of the many valuable contributions of Joseph T. Morrow to the communities of Gary, East Chicago, and Hammond. This non-renewable scholarship is available to graduating seniors from the Gary Community School Corporation, the School City of Hammond, and the East Chicago School District. The recipient this year is **Joshua Bradley**.



D. J. And Rose Nidetz Scholarship

was established in the fall of 2007 for students who work in or on a production with a "Northwest Indiana Excellence in Theatre Foundation" Member Theatre. This year's recipient is **Carly Blane**.

June Pangburn Scholarship was established in memory of June who served as the Director of Nursing at St. Mary's Hospital (Hobart) and as a mentor to many nursing students. This scholarship benefits a Hobart High School Senior studying nursing or allied health. The recipient this year is **Taran Delaney**.



Nancy J. Pinnick Memorial Scholarship was established by the Pinnick family to continually recognize her dedication and work as an educator in a meaningful and dignified way. Nancy knew first hand the challenges of many children in the River Forest District. This renewable scholarship benefits a graduating senior from River Forest High School. The recipient this year is **Juan Martinez, Jr.**



Primich Scholarship recipients with John Primich.

John V. And George Primich Family Scholarship, established in 2005, benefits the children or grandchildren of current hourly and salaried employees of G.W. Berkheimer Co. and South Central. The recipients this year are **Enrique Ayala, Kristine Booth, Jalyn Brown, Cassandra Copenhaver, Ryan Merriman, and Eleanor Schuman**.

Schrage Family Scholarship is a renewable scholarship established by Centier Bank in 1995 and is awarded to students who have achieved academic excellence and leadership in the community and in their schools. It is awarded to a

graduating senior in each of the communities served by Centier Bank. This year's 19 recipients are: **Kyle Adkins, Mohammed Arifee, Melanie Beres, Erik Bisson, Julia Chappell, Divya Chauhan, Brianna Ciara, Olivia Gordon, Kory Hinz, Samantha Irk, Zach Kisfalusi, Ashley Kutemeier, Tiffany McElroy, Ryan Mitchell, Susan Sobczak, Katherine Staley, Darnesha Talley, Jessica Villarruel, and Abigail Walters**.

Sengupta Family Scholarship was established in memory of Ganapati Sengupta, and this renewable scholarship is awarded to the valedictorian of Lake Central High School. The recipient this year is **Erin Myers**.

Dr. R. T. White Scholarship was established in memory of a beloved principal at Elliot Elementary School and is awarded each year to a graduating student from Munster High School who attended Elliot Elementary. The recipient this year is **Katherine Palmer**.

Donna K. Yundt Memorial Scholarship was established in memory of a beloved teacher in the Lake Central Schools. This scholarship is awarded to a student who attended Peifer Elementary, and this year's recipient is **Suzanne Foreman**.

HOW TO APPLY FOR A GRANT

A community foundation serves a defined geographic area. However, community is more than a geographic region. It is a vision that exists in the minds of people who share common goals and concerns. The Legacy Foundation's vision of community extends to projects that enhance:

- **ARTS AND CULTURE**
- **CIVIC AFFAIRS**
- **COMMUNITY DEVELOPMENT**
- **EDUCATION**
- **ENVIRONMENT**
- **HEALTH AND HUMAN SERVICES**
- **YOUTH**

Charitable organizations serving Lake County, Indiana may access grant application guidelines by visiting our website: www.legacyfoundationlakeco.org or by contacting our office at 219.736.1880. Application deadlines: the deadlines for submitting grant applications are March 1, May 1, September 1, and November 1.

FUNDING PRIORITIES

Funding priorities for the Legacy Foundation include grants for projects which have the potential for significant impact on the community, encourage collaboration, effectively utilize community resources, and build organizational capacity.

GRANT WRITING ADVICE

A Top Ten list of recommendations from private and community foundations in Indiana

From the "Meet the Funder" events hosted by the Indiana Youth Institute across the Hoosier state.

- ONE** Do your homework on the foundation using the foundation's Web site and annual report.
- TWO** But don't chase dollars based on what you learn. Foundations will see right through this. Instead, apply only for grants that support your mission. Stick to your mission.
- THREE** In your grant proposal, articulate the problem and how you will try to solve (or at least reduce) the problem. Do not over-promise. Be realistic.
- FOUR** Explain how you will know when you are successful. That means include an evaluation plan.
- FIVE** Keep the proposal clear, simple and concise.
- SIX** Do not write a generic proposal that then is mass produced for multiple foundations. Tailor each proposal to the specific interests of each foundation.
- SEVEN** Do not go to a foundation too late, with an urgent need or as a last resort.
- EIGHT** Foundations do not want to be the Lone Ranger. The more broad-based financial support you can demonstrate, the more you are demonstrating sustainability to the foundation.
- NINE** The accompanying budget needs to be detailed and include a written justification. Do not submit general estimates. Don't ask for more than you need, thinking you will receive less.
- TEN** After receiving the grant, be sure to send a "thank you" letter which acknowledges receipt of grant funds. Submit an accurate grant report and an accurate financial report by the foundation's deadline. Good grant management strengthens your reputation among funders.



Legacy Foundation, Inc.
1000 E. 80th Place, South Tower 302
Merrillville, IN 46410
219-736-1880

Fax: 219-736-1940

E-mail legacy@legacyfoundationlakeco.org
www.legacyfoundationlakeco.org

LAKE COUNTY COMMUNITY FUND GRANT APPLICATION PACKET

The mission of Legacy Foundation is to encourage philanthropy, support good works, and inspire leadership in Lake County. The mission is achieved by building a community endowment, addressing needs through grantmaking, and by providing leadership on key community issues. Legacy Foundation strategically makes high impact grants in the areas of **arts and culture, civic affairs, community development, education, the environment, health, human services, and youth services.**

FUNDING RESOURCES: Legacy Foundation will make grants to non-profit organizations that implement projects with the potential to make a difference in the quality of life of a substantial number of residents of Lake County, Indiana. Geographic distribution may be considered in awarding grants. The *Lake County Community Fund* has been established to be responsive to needs throughout Lake County and is dedicated to worthwhile community projects in the areas of arts and culture, civic affairs, community development, education, the environment, health, human services, and youth services. Grants typically have ranged from \$1,000 to \$25,000.

FUNDING PRIORITIES: Legacy Foundation is dedicated to improving the quality of life in Lake County, Indiana. Funding priorities include projects that:

- Develop or test new solutions to community problems
- Address prevention as well as remediation
- Provide assistance to underserved community resources
- Provide leverage for generating other funds and community resources, both financial and volunteer
- Provide a sustained and transforming effect for a substantial number of residents
- Build organizational capacity and improve the effectiveness or efficiency of non-profit groups
- Provide a favorable ratio between the amount of money requested and the number of people served
- Facilitate cooperation and collaboration among organizations without duplicating services
- Encourage volunteerism and civic engagement and development

FUNDING LIMITATIONS: In general, Legacy Foundation does not support:

- General operating expenses (salaries, supplies, administrative overhead)
- Endowment campaigns; annual campaigns; fundraising events (including, but not limited to, the purchase of tables at dinners, ads in program booklets and raffle tickets)
- Travel grants (fees for field trips or other travel-related expenditures)
- Grants for individual schools or sponsorship of sports teams
- Previously incurred debt or retroactive funding for current projects
- Other grant making organizations
- Individuals (except designated scholarship funds) & independent scholarly research projects
- Religious or sectarian programs, political parties or campaigns

GRANT NARRATIVE GUIDELINES: *The narrative must be typed using a 12 point font and double-spaced. Respond to the questions in the order listed. Number the first section of each response to correspond to the section numbers below. Refer to the Glossary of Terms for clarification of guidelines. The narrative **must not exceed three pages. Narratives exceeding the three page limit will be returned without review.***

[1] Need: What need have you identified that diminishes the quality of life in the community? Use statistics to validate the need. Describe the target population to be served.

[2] Proposed Project: Include goals (solutions to the need) and objectives (how to achieve the solution).

[3] Project Activities: Describe how this project will operate. Include a timeline. Describe the role of collaboration partners, if applicable.

[4] Evaluation: What are the anticipated outputs and outcomes for this project? How will you evaluate this project? What will be the impact of this project on the community?

[5] Sustainability: Describe how the grant may be leveraged for additional funding. How will the project be financially sustained after the grant money has been expended?

[6] Organization Overview: Concise description of the applicant organization, including history, mission, and current programs. Summarize the qualifications of the key staff. Describe the role of volunteers.

GLOSSARY OF TERMS

Capacity Building: Increasing organizational effectiveness through staff training and development, board training and development, technology upgrades or technical assistance/consultants.

Challenge Grant: The amount of the grant must be matched with new money to receive funding.

General Operating Support: Funds to support the ongoing services of an organization including, but not limited to, salary, supplies, mileage and administrative overhead costs.

Memorandum of Understanding: A signed agreement (MOU) detailing the roles and responsibilities of partners participating in a collaboration project.

Operating Budget: Indicates revenues and expenses for the operations of the organization.

Outcome: The intended benefits for the program participants that include: new knowledge, increased skills, changed attitudes or behavior, or improved quality of life.

Outputs: The intended number of participants, number of sessions, and amount of materials distributed.

Program: An organized set of services designed to achieve specific outcomes for a specified population that will continue beyond the grant period.

Project: A planned set of services designed to achieve specific outcomes that begin and end within the grant period.

Project Budget: Indicates the revenues and expenses for a particular program/project for which funding is being requested.

Project Budget Narrative: A detailed explanation of the line items included in the budget in narrative format.

www.guidestar.org : GuideStar's mission is to revolutionize philanthropy and nonprofit practice by providing information that advances transparency, enables users to make better decisions, and encourages charitable giving. Any nonprofit in GuideStar's database¹ can update its report with information about its mission, programs, leaders, goals, accomplishments, and needs—for free.

ADDITIONAL PRE-GRANT/POST-GRANT INFORMATION

- You may submit a draft of your proposal for review by Legacy Foundation staff. This does not guarantee funding of your proposal.
- Lobbying of Board of Directors or Grant Committee members for support of grant proposals undermines the Foundation's commitment to ethical standards of operation and is prohibited.
- The Foundation may require changes in a proposed project before it can be approved for funding.

¹ If a nonprofit has 501(c)(3) status in good standing, it will be in GuideStar's database.

- If approved, the grantee will be sent an acceptance letter along with two copies of a Terms of Grant Agreement, specifying the purpose and terms of the grant. Upon receipt of the signed Grant Agreement, funds will be disbursed by the Foundation.
- Grant Reports must be submitted by the grantee to the Foundation by the dates specified in the Grant Agreement. Legacy Foundation will provide a Grant Report Form. Non-compliance with report deadline requirements may jeopardize future grant consideration.
- The applicant or representatives of a grantee organization must mention the Legacy Foundation as a funding agency in any interview, press release, or formal communication regarding the funded project.

REVIEW PROCESS: Grant applications are reviewed by Legacy Foundation's professional staff and Grant Committee. Site Visits may be scheduled as a component of the Foundation's due diligence process. Recommendations for funding are presented by the Grant Committee to the Board of Directors for approval. Typically a decision will be made within 60 days from the deadline dates for submission of proposals.

All grant applicants will be notified in writing with respect to the final funding decisions of Legacy Foundation. This correspondence will provide a Terms of Grant Agreement for those grants that have been approved. Legacy Foundation will periodically review each grant and will require a final evaluation report from each grantee.

It is the policy of Legacy Foundation to operate without discrimination as to age, race, religion, sex or national origin in the overall administration of the Foundation and in the consideration of grant proposals.

The deadline for submitting Lake County Community Fund grant applications is 5:00 PM on March 1, May 1, September 1, and November 1. If the deadline falls on a non-business day, proposals must be received by 5PM on the last business day prior to the deadline. Legacy Foundation will confirm receipt of all proposals. To facilitate the application process, the Foundation requests that applicant organizations schedule a consultation with the Program Officer prior to submitting a proposal.

PROPOSAL CHECKLIST: Review the following checklist prior to submitting your application. **If any of this information is not available, please indicate the reason. Incomplete proposals will not be considered for review.**

- Grant Request Cover Pages, with printed names and signatures (refer to pages 4 & 5 of this document)
- Grant Narrative, typed using a 12 point font and double-spaced, not exceeding three pages
- Project Budget and Budget Narrative. Refer to Sample Project Budget.
- A list of the Board of Directors and Officers including professional affiliations and individual addresses
- Copies of Memorandum of Understanding (MOU) if the application is for a collaboration project
- One or two page summary of the organization's current fiscal year operating budget
- Copy of the most current fiscal year financial statements of the organization (Balance Sheet and Profit and Loss Statement) as well as financial audit or review, if available
- Evidence of Board approval of this application
- Copy of IRS Determination Letter designating federal tax exempt status
- Organization's profile on GuideStar (www.guidestar.org) is up to date.

All proposals should be secured with a binder clip. Please *do not* place in folders, 3-ring binders, staple, or spiral bind. Submit ONE copy of the proposal. Do not submit additional materials. Mail to:

**Legacy Foundation, Inc.
1000 E. 80th Place, South Tower 302
Merrillville, IN 46410**



**Legacy Foundation, Inc.
Grant Request Cover Page One**

Name of Organization: _____

Contact Person: _____ Title: _____

Address: _____
(street) (city) (zip)

Phone: _____ Fax: _____

E-Mail: _____ Website: _____

Project Title: _____

Amount Requested: _____ Projected Number of Clients to Receive Services: _____

What is the cost per client served to the amount requested? _____

What percentage of your board members made a financial contribution in the last fiscal year? _____

What is the total amount contributed by your board in the last fiscal year? _____

How many board members participated in governance training this past year? _____

Organization's profile on GuidesStar (www.guidestar.org) was updated on ____/____/____
Month Day Year

Project Start Date: _____ Expected Project Completion Date: _____

Please give a brief [two sentence] summary of your request:

Signature of Executive Director
Entity

Signature of Chairperson, Governing

Printed Name

Printed Name

To the best of your ability, please provide the following program and demographic information:

Indicate the program area for your request:	
<input type="checkbox"/> Arts and Culture <input type="checkbox"/> Civic Affairs <input type="checkbox"/> Community Development <input type="checkbox"/> Education	<input type="checkbox"/> Environment <input type="checkbox"/> Health <input type="checkbox"/> Human Services <input type="checkbox"/> Youth Services
This request is for (select one):	
<input type="checkbox"/> Program development <input type="checkbox"/> Program start-up costs <input type="checkbox"/> Equipment <input type="checkbox"/> Other _____	<input type="checkbox"/> Capacity-building <ul style="list-style-type: none"> <input type="checkbox"/> Staff development <input type="checkbox"/> Technical assistance <input type="checkbox"/> Board Training <input type="checkbox"/> Technology Upgrade
Age of the categories your program will primarily serve:	
<input type="checkbox"/> Infants/babies <input type="checkbox"/> Kindergarten to 12 th Grade <input type="checkbox"/> Children 5 – 14 <input type="checkbox"/> Youth 14 – 19 <input type="checkbox"/> Adults <input type="checkbox"/> Elderly / Senior Citizens	Gender of the clients you will primarily serve:
	<input type="checkbox"/> Female <input type="checkbox"/> Male <input type="checkbox"/> Non-specific, both genders
What target population will your program serve?	
<input type="checkbox"/> African American <input type="checkbox"/> Asian <input type="checkbox"/> Hispanic	<input type="checkbox"/> Native American <input type="checkbox"/> Caucasian <input type="checkbox"/> Non-specific, all target populations
What economic groups comprise your target population?	
<input type="checkbox"/> Economically disadvantaged <input type="checkbox"/> Homeless <input type="checkbox"/> Migrant Workers	
Indicate any disability groups your program will serve:	
<input type="checkbox"/> Physically challenged <input type="checkbox"/> Blind/Vision Impaired <input type="checkbox"/> Deaf/Hearing Impaired	<input type="checkbox"/> Drug or Alcohol Addictions <input type="checkbox"/> Mentally/Emotionally Impaired



**Legacy Foundation, Inc.
Project Budget**

Please describe, in as much detail as possible, the budget for your project or program. Please provide a narrative explanation for each line item included.

REVENUE

Source	Indicate date revenue has been received, date revenue is pending or source of in-kind donation	Amount
<hr/>		

TOTAL

EXPENSES

Description of Expenses	Amount
<hr/>	

TOTAL



Legacy Foundation, Inc.
Sample Project Budget

This is a sample budget for a project for start-up costs to develop and implement a nationally-recognized after-school program for at-risk girls at the Kids Are Great Club. You may use this sample as a guide in preparing your own Project Budget. You do **not** need to submit this page with your completed proposal. Please note that total revenues **must** equal total expenses.

REVENUE

Source	Indicate date revenue has been received, date revenue is pending or source of in-kind donation	Amount
Contributions from individuals	Pending June, 2007	\$8,000.00
Sunshine Lollipop Corporation	Received March, 2007	\$1,000.00
XYZ Foundation	Received April, 2007	\$2,000.00
Kids Are Great	In-kind/Pine School	\$1,500.00
Legacy Foundation	Pending May, 2007	\$2,500.00
TOTAL		\$15,000.00

EXPENSES

Description of Expenses	Amount
Meeting room In-kind donation; includes security & cleaning fees. \$50/week for 30 weeks	\$1,500.00
Staff development and training for 40 volunteers & 10 staff members Workshop facilitators for 5 sessions @ \$800 per session [\$4,000] Program Workbooks @ \$15 for 50 people [\$750] Food at \$5.00 per person for 50 people for 5 sessions [\$1,250]	\$6,000.00
Purchase of tables and chairs for meeting room Three bids were obtained from local vendors. Ten tables @ \$100 & 100 chairs @ \$15	\$2,500.00
Program materials/curriculum 100 program notebooks @ \$10.00 [\$1,000] Snacks @ \$.50 for 100 participants x 30 weeks [\$1,500] Art supplies & field trips [\$500]	\$3,000.00
Marketing expenses to advertise program Four bids were obtained to print 10,000 brochures and 500 flyers	\$1,000.00
Fee for national accreditation Annual fee to the Kids Are Great Foundation. Includes membership dues & program updates.	\$1,000.00
TOTAL	\$15,000.00

Sample Memorandum of Understanding

[Insert Name of Applicant Organization]
and the
[Insert Name of Collaboration Partner]

This memorandum of understanding is between **[Insert Name of Organization]** and the **[Insert Name of Organization]**, for the purpose of **[Insert purpose of collaboration]**.

AREAS OF COLLABORATION

The **[Insert Name of Organization]** and the **[Insert Name of Organization]** will partner to: **[Insert list of agreed strategies and define roles and responsibilities. If collaboration is for the purpose of securing a grant, the entity responsible for receipt and disbursement of grant funds must be designated as such.]**

In support of the efforts of **[Insert Name of Organization]** and **[Insert Name of Organization]**, both programs will:

- Facilitate the ongoing and productive relationship between the above entities.
- Assist with basic information exchange that serve to clarify goals, requirements, and procedures of the programs, thereby reducing and eliminating misunderstandings, in order to facilitate maximum collaboration.
- Communicate regularly with key representatives of the two entities to maximize coordination and minimize duplication of activities and functions.

REVIEW AND/OR TERMINATION OF AGREEMENT

- This agreement may not be terminated during the period covered by the Legacy Foundation Terms of Grant Agreement.
- Representatives selected by each of the programs will annually review this agreement.
- This Memorandum of Understanding shall be effective once authorized signatures are obtained from official representatives of both parties and shall remain in effect until **[Insert Date]**

Printed Name, Title, Name of Organization

Signature

Date

Date adopted by the Board of Directors

Printed Name, Title, Name of Organization

Signature

Date

Date adopted by the Board of Directors



Legacy Foundation GRANT REPORT FORM

Grant #: _____ Grant Amount: \$ _____

Name of Project: _____ Report Due Date: _____

Organization Name: _____

Street Address: _____

City, State, Zip: _____

Phone: _____ E-Mail: _____

Report Completed by: _____ Signature: _____

Attach a one page typed narrative that addresses the following questions:

1. Briefly restate the project for which this grant was awarded.
2. What outcomes did you anticipate from this project? Were those outcomes achieved?
3. What challenges did you encounter with the implementation of this grant?
4. What impact has this grant had on the community?
5. Have you expended the entire amount of the grant? Please attach a summary of your line item expenses and copies of receipts.

Please submit any of the following materials that may be available:

- Photographs [digital preferred] of grant-related activities. Identify people and/or activities that are pictured, the date and photographer credit.
- Up to 3 samples of publicity, programs, press coverage or other documentation.
- Audio or video compact discs documenting the project.

Return completed Grant Report by the required deadline specified in the Terms of Grant Agreement to:

PROGRAM OFFICER
Legacy Foundation, Inc. • 1000 E. 80th Place, South Tower 302 • Merrillville, IN 46410

WHAT'S YOUR LEGACY?

HOW TO DONATE TO LEGACY FOUNDATION

It's easy to give through Legacy Foundation. You can make a gift at any time. Large or small, a charitable gift is a powerful way to make a difference.

Whatever your charitable giving goals, we offer flexible and convenient support for giving today or in the future. Donors can create new funds or add to established funds that support their interest, address community needs, and ensure resources for established programs and organizations. Because these funds are professionally managed and monitored, they yield steady earnings that will continue to enhance the community for years to come. As a public charity, the Foundation offers the donor the highest level of benefits for charitable giving.

GIFTS OF CASH

Simplest and most convenient, a gift can be named for a donor, or in memory or honor of someone. Gifts can be given at any time and in any amount. Maximum tax advantages are enjoyed by the donor.

SECURITIES

By contributing appreciated securities, you may completely avoid the capital gains tax while securing an income tax deduction for the fair market value of the gift.

GIFT ANNUITIES

During your lifetime, you receive income from your gift. Cash or appreciated securities are given to the Foundation and you receive income for life. In addition to an immediate tax deduction, a portion of the income received is tax-free. At the conclusion of the annuity contract, the remaining funds will support your charitable purposes.

BEQUESTS

A bequest of cash or property through a will is usually fully tax deductible. There are a number of ways to name the Foundation in your will.

CHARITABLE REMAINDER TRUSTS

These trusts are arrangements between a donor, a trustee and the Foundation. You may transfer cash, property or highly appreciated securities to the trust and take an immediate income tax deduction. You retain the right to the income or specify who is to receive the income and at what rate. After the death of the last income beneficiary, the remaining funds will support your charitable purposes or the charities of your choice.

LIFE INSURANCE

You may name Legacy Foundation, Inc. as the beneficiary of your policy or donate a policy, no longer needed, to the Foundation and receive an immediate tax deduction usually equal to the cash surrender value. You may name the Foundation as the recipient of dividends, or as the beneficiary of a new or existing policy.

RETIREMENT PLAN ASSETS

Retirement plan assets may be a particularly effective way to fund a charitable bequest. Depending on the size of your estate, income and estate taxes may consume a large portion of this asset. Naming the Foundation or a Charitable Remainder Trust as the beneficiary for all or some of the assets remaining in your plan at your death can substantially reduce or eliminate your tax liability.

PRIVATE FOUNDATION TRANSFERS

Private foundations can transfer all or some of the assets to the Foundation, yet retain the private foundation's name and purpose. Such transfers offer tax advantages, flexibility and administrative savings.

For more information, without any obligation, contact Harry J. Vande Velde III at 219-736-1880 or email hvandevelde@legacyfoundationlakeco.org

FOR GOOD. FOR EVER.



The **LEGACY** we leave
is not just in our possessions
but in the quality of our lives.

—Billy Graham



HONORARY GIFTS

Catholic Charities Diocese of Gary, Inc.

In honor of Palmer Singleton, Jr.

Richard and Sylvia Morrisroe

College Readiness Endowment Fund

In honor of Nancy Johnson

Northern Indiana Public Service Company

In honor of Nancy Johnson's retirement

Mr. and Mrs. Lawrence Battistini

Lake County Community Fund

In honor of Mr. and Mrs. Paul Longawa

Mr. Jerome Longawa

In honor of Una M. Hoisser

Chancellor Howard S. Cohen

In honor of Thomas and Elizabeth Cappas' 50th Wedding Anniversary

Mr. Verne P. Seehausen, CPA

In honor of Richard J. Walsh

Mr. and Mrs. Richard Walsh

Merrillville Breakfast Kiwanis Club Educational Attainment Fund

In honor of Kiwanis Clubs of Merrillville

Kiwanis Club of Merrillville–Noon

In honor of Barb Koby, President

Kiwanis Club of Merrillville–Breakfast

Miller Community Fund

In honor of John Vinzant

Northern Indiana Public Service Company

NWI Habitat for Humanity Fund

In honor of Nancy Johnson's grandchildren: Jack, Meghan, Erin and Katie

Mrs. Cheryl L. Hicks

In honor of Steve and Nancy Janett and Will and Marcia Glaros

Allen and Nancy Johnson

HONORARY GIFTS

Salvation Army of Lake County Fund

In honor of Majors Robert and Vicki Buttrey

Ms. Julie E. Stogsdill

Seehausen/Boys & Girls Clubs of NWI Fund

In honor of the birth of:

Merrick John Drone

Abigail Joy Hendricks

Carson Bennett Drone

Abigail Kathleen Collins

Eli Scott Jones

Ryan Cooper Rokita

Sylvia Shaynie Shosheski

Mr. Verne P. Seehausen, CPA

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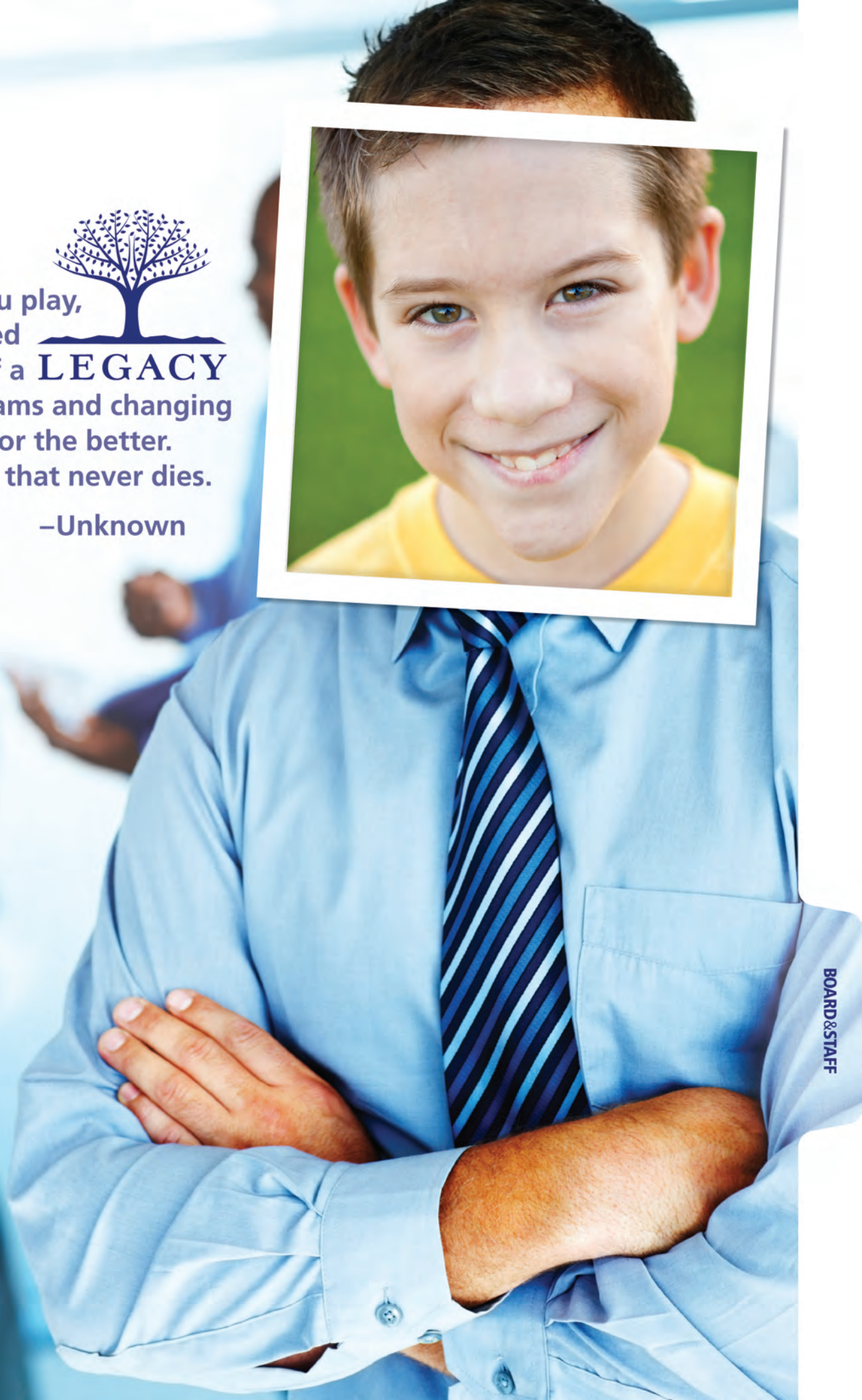
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Whatever part you play,
be remembered
as part of a **LEGACY**
of sharing dreams and changing
humanity for the better.
It's that legacy that never dies.

—Unknown



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In grateful memory of Ed's legacy to the people of Lake County, Indiana

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A man cannot
leave a
better **LEGACY** to
the world than a
well-educated family.

—Thomas Scott

GLOSSARY

501(c)(3)

| fahyv-oh-wuhn see three | –noun

Section of the Internal Revenue Code that designates an organization as charitable and tax-exempt. Organizations qualifying under this section include religious, educational, charitable, amateur athletic, scientific or literary groups, organizations testing for public safety, or organizations involved in prevention of cruelty to children or animals. Most organizations seeking foundation or corporate contributions secure a Section 501(c)(3) classification from the Internal Revenue Service (IRS). Note: The tax code sets forth a list of sections-501(c)(4)-(26)-to identify other nonprofit organizations whose function is not solely charitable (e.g., professional or veterans organizations, chambers of commerce, fraternal societies, etc.).

509(a)

| fahyv-oh-nahyn ey | –noun

Section of the tax code that defines public charities (as opposed to private foundations). A 501(c)(3) organization also must have a 509(a) designation to further define the agency as a public charity.

Annual Report

| an-yoo-uhl ri-pawrt | –noun

A voluntary report published by a foundation or corporation describing its grant activities. It may be a simple, typed document listing the year's grants or an elaborately detailed publication. A growing number of foundations and corporations use an annual report as an effective means of informing the community about their contribution activities, policies and guidelines.

Articles of Incorporation

| ahr-ti-kuhls uhv in-kawr-puh-rey-shuhn | –noun

A document filed with the Secretary of State or other appropriate state office by persons establishing a corporation. This is the first legal step in forming a nonprofit corporation.

Assets

| as-ets | –noun

Cash, stocks, bonds, real estate or other holdings of a foundation. Generally, assets are invested and the income is used to make grants.

Bequest

| bih-kwest | –noun

A sum of money made available upon the donor's death.

Bylaws

| bahy-laws | –noun

Rules governing the operation of a nonprofit corporation.

Capital Campaign

| kap-i-tl kam-peyn | –noun

Also referred to as a Capital Development Campaign, a capital campaign is an organized drive to collect and accumulate substantial funds to finance major needs of an organization such as a building or major repair project.

Challenge Grant

| chal-inj grant | –noun

A grant that is made on the condition that other monies must be secured, either on a matching basis or via some other formula, usually within a specified period of time, with the objective of stimulating giving from additional sources.

Community Foundation

| kuh-myoo-ni-tee foun-dey-shuhn | –noun

A community foundation is a tax-exempt, nonprofit, autonomous, publicly supported, philanthropic institution composed primarily of permanent funds established by many separate donors for the long-term diverse, charitable benefit of the residents of a defined geographic area.

Corporate Foundation

| kawr-per-it foun-dey-shuhn | –noun

A corporate (company-sponsored) foundation is a private foundation that derives its grantmaking funds primarily from the contributions of a profit-making business and is subject to the same rules and regulations as other private foundations.

Decline

| dih-klahyn | –noun

Also referred to as a denial, a decline is the refusal or rejection of a grant request. Some declination letters explain why the grant was not made, but many do not.

Discretionary Funds

| dih-skresh-uh-ner-ee fuhnds | –noun

Grant funds distributed at the discretion of one or more trustees, which usually do not require prior approval by the full board of directors. The governing board can delegate discretionary authority to staff.

Donor Advised Fund (community foundation)

| doh-ner ad-vahyzd fuhnd | –noun

A fund held by a community foundation where the donor, or a committee appointed by the donor, may recommend eligible charitable recipients for grants from the fund. The community foundation's governing body must be free to accept or reject the recommendations.

Endowment

| en-dou-muhnt | –noun

The principal amount of gifts and bequests that are accepted, subject to a requirement that the principal be maintained intact and invested to create a source of income for a foundation.

Form 990/Form 990-PF

| fawrm nahyn nahyn-tee (pee ef) | –noun

The IRS forms filed annually by public charities and private foundations, respectively. The letters PF stand for private foundation. The IRS uses this form to assess compliance with the Internal Revenue Code. Both forms list organization assets, receipts, expenditures and compensation of officers.

Funding Cycle

| fuhn-ding sahy-kuhl | –noun

A chronological pattern of proposal review, decision making and applicant notification. Some donor organizations make grants at set intervals (quarterly, semiannually, etc.), while others operate under an annual cycle.

Grant

| grant | –noun

An award of funds to an organization or individual to undertake charitable activities.

Grantee

| gran-tee | –noun

The individual or organization that receives a grant.

Grantor

| gran-ter | –noun

The individual or organization that makes a grant.

In-Kind Contribution

| in-kahynd kon-truh-byoo-shuhn | –noun

A donation of goods or services rather than cash or appreciated property.

Letter of Intent

| let-er uhv in-tent | –noun

A grantor's letter or brief statement indicating intention to make a specific gift.

Letter of Inquiry

| let-er uhv in-kwuh-ree | –noun

Also referred to as a query letter, this is a brief letter outlining an organization's activities and a request for funding sent to a prospective donor to determine if there is sufficient interest to warrant submitting a full proposal.

Matching Gifts Program

| mach-ing gifts proh-gram | –noun

A grant or contributions program that will match employees' or directors' gifts made to qualifying educational, arts, cultural, health or other organizations. Each employer or foundation establishes specific guidelines. (Some foundations also use this program for their trustees.)

Matching Grant

| mach-ing grant | –noun

A grant or gift made with the specification that the amount donated must be matched on a one-for-one (or according to some other prescribed formula) basis.

Operating Support

| op-uh-rey-ting suh-pawrt | –noun

A contribution given to cover an organization's day-to-day, ongoing expenses, such as salaries, utilities, office supplies, etc.

Philanthropy

| fi-lan-thruh-pee | –noun

Philanthropy is defined in different ways. The origin of the word philanthropy is Greek and means “love for mankind.” Today, philanthropy includes the concept of voluntary giving by an individual or group to promote the common good.

Pledge

| plej | –noun

A promise to make future contributions to an organization. For example, some donors make multiyear pledges promising to grant a specific amount of money each year.

Postgrant Evaluation

| pohst-grant ih-val-yoo-ey-shuhn | –noun

A review of the results of a grant, with the emphasis upon whether or not the grant achieved its desired objective.

Private Foundation

| prahy-vit foun-dey-shuhn | –noun

A nongovernmental, nonprofit organization with funds (usually from a single source, such as an individual, family or corporation) and program managed by its own trustees or directors, established to maintain or aid social, educational, religious, or other charitable activities serving the common welfare, primarily through grantmaking. Private foundation also means an organization that is tax exempt under Section 501(c)(3) of the tax code and is classified by the IRS as a private foundation defined by the code.

Restricted Funds

| ri-strik-tid fuhnds | –noun

Assets or income that are restricted in their use, in the types of organizations that may receive grants from them, or in the procedures used to make grants from such funds.

Seed Money

| seed muhn-ee | –noun

A grant or contribution used to start a new project or organization.

Site Visit

| sahyt viz-it | –noun

Visiting a donee organization at its office location or area of operation, or meeting with its staff, directors, or recipients of its services.

Socially Responsible Investing

| soh-shuhl ri-spon-suh-buhl in-ves-ting | –noun

Also referred to as ethical investing and social investing, this is the practice of aligning a foundation’s investment policies with its mission.

Spending Policy

| spend-ing pol-uh-see | –noun

An agreed-upon policy that determines what percentage of a group of assets, such as an endowment, should be spent to cover both operating costs and grants of an institution.

Supporting Organization

| suh-pawr-ting awr-guh-nuh-zey-shuhn | –noun

A supporting organization is a charity that is not required to meet the public support test because it supports a public charity.

Tax-Exempt Organizations

| taks-ig-zempt awr-guh-nuh-zey-shuhn | –noun

Organizations that do not have to pay state and/or federal income taxes. Organizations other than churches seeking recognition of their status as exempt under Section 501(c)(3) of the Internal Revenue Code must apply to the Internal Revenue Service.

Trust

| truhst | –noun

A legal device used to set aside money or property of one person for the benefit of one or more persons or organizations. A private foundation can be organized as a charitable trust and is governed by a trust instrument that appoints initial trustees, sets forth their powers and provides for orderly selection of future trustees.

Trustee

| truh-steen | –noun

The person(s) or institutions responsible for the administration of a trust.

Unrestricted Funds

| uhn-ri-strik-tid fuhnds | –noun

Normally found at community foundations, an unrestricted fund is one that is not specifically designated to particular uses by the donor, or for which restrictions have expired or been removed.



The Legacy Foundation is Lake County, Indiana's Community Foundation. We improve lives in Lake County by making grants to nonprofit organizations, offering technical assistance and capacity building to charitable groups, and providing philanthropic leadership in the community.

Contact us to learn about ways you can leave a legacy in your community.

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