

# WHAT'S YOUR LEGACY? ANNUAL REPORT 2010-2011



Give. Lead. Make a Difference.

# OUR MISSION STATEMENT

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

### LEGACY FOUNDATION IN OUR COMMUNITY

Through the generosity of our many donors, more than \$30 million in grants and scholarships have been awarded to Lake County nonprofit organizations and individuals since 1992.

- » We are your philanthropic partner helping meet our community's needs.
- » We collaborate with other leaders to solve problems and enhance lives.
- » We are mentors who build the capacity of our region's nonprofit community.
- » We offer financial expertise and strong stewardship of community resources.
- » We support inspired leadership.

### LEGACY FOUNDATION FACTS

- » Nearly \$40 million in assets as of June 30, 2011
- » Manages more than 260 funds
- » Manages more than 25 scholarship programs that are distributing over \$350,000 in student aid for the 2011-2012 academic year
- » Helped more than 200 nonprofits over nearly 20 years

### **FIND US**

1000 East 80th Place, Suite 402N Merrillville, IN 46410 219.736.1880 www.legacyfoundationlakeco.org



# DEAR FRIENDS:

Legacy Foundation strives to be your philanthropic partner helping to meet Lake County's community needs. We are proud and pleased to share with you this annual report for 2010-2011, which demonstrates the many ways we partner to bring good works to life in the community.

- » Legacy Foundation is a strong fiscal steward of community resources. At the center of our mission is the importance of managing our donors' gifts, the foundation's portfolio and our expenses very carefully. See pages 2-3 for our year-end financial review and our auditors' report.
- » We build the capacity of our region's nonprofit community by making grants to organizations in Northwest Indiana that have exhibited and articulated not only a need, but a plan with measurable action items that address and create positive change as it relates to that need. We are proud of our collaborative relationship with leaders throughout the region, and we look forward to creating real transformational grants in the near future.
- » We manage more than 260 funds set up by philanthropically minded donors to enhance the lives of others in our community. On page 7 you'll find a list of new funds created during the past fiscal year. See our Web site, or the binder distributed as last year's annual report, for a full list of funds.
- » We manage more than 25 scholarship programs that are helping dozens of students attend postsecondary education, with more than \$350,000 being distributed for the 2011-2012 academic year.

Most importantly, this report is a giant "thank you." Our report contains numerous rosters of names: donors, board members, committee members, grantees, volunteers. Far more than lists, these names represent our core value of being in the people business. The names on these pages exemplify the principle of people giving to people — people giving the gifts of wealth, work and wisdom. We are most grateful to everyone attached to the foundation. In fact, Legacy Foundation is a microcosm of all that is good in the region—its people!

We thank all of you for your trust and belief in Legacy Foundation, and we look forward to continuing to partner with you to advance Lake County.

Give to Live,

Robert J. Nickovich Chair, 2010-2011 Harry J. Vande Velde III
President and Chief Executive Officer

# 2010-2011 FINANCIALS

Legacy Foundation, Inc. Summarized Financial Information As of June 31, 2010

	June 30, 2011
Total Assets	<u>\$39,793,836</u>
Custodial funds and other liabilities	\$11,123,719
Total Net Assets	<u>\$28,670,117</u>
	\$39,793,836
	Year ended
	June 30, 2011
Revenues	
Contributions	\$1,811,262
Investment return, net	\$5,213,194
Administrative income	<u>\$424,589</u>
	\$7,449,045
Expenses	
Grants	\$1,545,412
Other programs	\$501,639
Management and general	\$265,492
Fundraising	<u>\$292,029</u>
	<u>\$2,604,572</u>
Change in Net Assets	\$4,844,473

The above represents condensed financial information as of June 30, 2011, and for the year then ended. Audited financial statements are available upon request.

The contributions of \$1,811,262 do not reflect \$866,113 contributed during the fiscal year to endowment and other funds shown as liabilities for financial statement purposes.

The grants of \$1,545,412 do not reflect \$352,902 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, 2011 and 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, 2011 and 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.

CPAS/ADVISORS



September 15, 2011

# DONORS

Mr. and Mrs. Marvin T. Allison Ms. Trish Alt Mr. and Mrs. Bob Anadell John W. Anderson Foundation ArcelorMittal USA Foundation Hon. Lorenzo Arredondo **Anonymous** Mr. and Mrs. Randall Astor Ayres Realtors, Inc. Mr. and Mrs. Frank J. Badalli Ms. Julie Baranowski Ms. Marysue Barrett Ms. Heidi Blastick Mr. and Mrs. David A. Bochnowski Dr. Martha C. Bohn Mr. and Mrs. Wallace R. Boilek Jr. Ms. Cathryn Bomberger Ms. Jane Bomberger Ms. Eleanore Bornstein Ms. Lee Botts Boys & Girls Clubs of Northwest Indiana Ms. Joann Braman Ms. Cornelia A. Brown Mr. Keith Bruxvoort Ms. Garnet M. Burns Ms. Susan Carew Mr. and Mrs. Wendell Carey Carras-Szany-Kuhn & Associates, P.C. Architects Catholic Foundation for the Diocese of Gary Ms. Shirley Caylor Ms. Megan Cecil Cenifax Management Services. Inc. **Centier Bank** Challenger Learning Center of Northwest Indiana Glenn and Margot Clark Ms. Nancy L. Clifford CFP Dale and Carol Cobble Ms. Carla Cohen

Mr. and Mrs. Max Cohen Ms. Patricia M. Cohen Ms. Susan Cohen Mr. and Mrs. E. Thomas Collins Jr. **Committee to Elect Thomas** Stefaniak, Jr. Committee to Elect John W. Rooda Ms. Danna Conley Mr. and Mrs. Larrid Cooper Ms. Barbara J. Cope Mr. Jose D. Espino Cornejo Mrs. Ruth Cornwell Ms. Aurelia M. Costanza Council on Foundations Ms. Patricia A. Cronin Dr. and Mrs. Charles O. Davidson Ms. Fredricka Davidson Ms. Betty Davin Ms. Jean A. Davis Ms. Ann K. Deckard **Dyer Chamber of Commerce** Elliott School PTO Ernest R. Elliott Elementary School Ms. Susan Fagen Family Care Center of IN LLC First National Bank of Illinois First Midwest Bank Ms. Tracey L. Foreman Foundations of East Chicago, Inc. Ms. Sandra Frankovich Fraternal Order of Police-Dyer Gallo Equipment Company Ms. Danette Garza Ms. Elaine Gehring Ms. Jennifer Gerber Mr. Matt Glaros Ms. Cheryl Gojko

Ms. Patricia B. Gonzales

Ms. Claudia J. Govert

Ms. Lea T. Govert

Mr. and Mrs. James Greiner Ms. Judy T. Gresko Ms. Ada Gross **Hammond Community** Corporation Hammond Education Foundation Drs. Dennis and Amy Han Ms. Leslie Hanna Mr. Glenn C. Hannah Mr. and Mrs. Dennis Hawrot Ms. Sarah H. Hensel Mr. and Mrs. Steve Highsmith **Hobart Industrial Economic** Development Corp. Horizon Financial Management Mr. Carl Hunter Independent Colleges of Indiana Indiana Grantmakers Alliance Ms. Rosalie Isaacson Mr. and Mrs. Steve A. Janett John S. & James L. Knight **Foundation** Ms. Nancy Johnson Ms. Lara Kalwinski Ms. Linda Kalwinski Mr. and Mrs. Roger F. Kapla Ms. Susan Kelley Ms. Pat Kelly Mr. and Mrs. James Kick Kiwanis Club of Merrillville-Noon Ms. Patricia Klancer Mrs. Mary M. Kocher Mr. and Mrs. Richard P. Komyatte Mr. and Mrs. George Korellis Mr. Richard Krooswyk CMFC Mr. and Mrs. Steve Kuehner Ms. Dorothy E. Kurtz Lake Area United Way Lake Central Education Foundation

**Lake County Retired Teachers Tours** 

Lee Companies Mr. and Mrs. Patrick M. Lee Lumina Foundation for Education Mr. and Mrs. Thomas Malsch Ms. Mary Ann McGuan Ms. Barbara M. Meeker Ms. Mellonie Mendoza and Children Miller Community Fund, Inc. Ms. Sherri Modrak Ms. Toni D. Mola Ms. Shirley S. Moorehead Ms. Janet Moran Mr. William Nangle Ms. Lois Nawrocki Ms. Mary E. Nemeth Ms. Chrissy Mancini Nichols Mr. and Mrs. Robert J. Nickovich Northern Indiana Public Service Company Northwest Indiana Excellence in Theatre Foundation Mr. and Mrs. Robert Nutt Mr. and Mrs. Jeffrey J. Oesterle Steve and Georgiann Pangere Mr. Glenn E. Parks Peoples Bank Ms. Cecile L. Petro Dale and Carol Polomchak Mr. and Mrs. Mamon Powers Jr. Mr. Mamon M. Powers III Ms. Shirley G. Roman Ms. Merilyn H. Rooney Mr. and Mrs. Dave Ryan Ms. Tina Ryczek Mr. Lance Ryskamp Ms. Linda Sadewasser Sister Loretta Schleper Ms. Wendy Schmidtke Sister Wila Schoch School City of Hobart **Educational Foundation** Mr. and Mrs. Michael D. Schutz Dr. and Mrs. John Scully Mr. and Mrs. John Shroat Sister Kathleen Ouinn Ms. Carol H. Smith Tom Sourlis and Sue Eleuterio South Shore Arts Mr. and Mrs. Jim Spicer Sister Peg Spindler Ms. Ethel Spisak

Ms. M. Penny Starin Mr. and Mrs. Charles W. Steele Mr. Mark J. Stern Ms. Judith Stiles Ms. Geraldine Stimson Swartz, Retson & Co., P.C. Ms. Eliza Peace Sweetner Ms. Melissa Szatkowski Mrs. Louise Tallent Ms. Helen Thoesen Town of Dyer TradeWinds Rehabilitation Center, Inc. Tri-C Corporation Ms. Vivian Vallone Valpak of Chicago South/NWI Judge and Mrs. Joseph S. Van Bokkelen Mr. and Mrs. Glenn S. Vician Mr. and Mrs. Alvin R. Washington Ms. Deborah G. Weiss Ms. Donna D. Welter Wexford Partners, Inc. White Family Foundation, Inc. YMCA of Hammond Area Ms. Pamela Meyer Yttri Ziolkowski Construction, Inc.

# THE LEGACY SOCIETY

Legacy Society members have generously made a gift or bequest to Legacy Foundation in 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.

219.736.1880 www.legacyfoundationlakeco.org legacy@legacyfoundationlakeco.org

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. Campion
Mr. and Mrs. Glenn H. Clark

Mr. and Mrs. Arthur Collins
Estate of 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 Seehausen, CPA
Ms. Lynette M. Stephens
Estate of Martha L. Woodward
Ms. Pamela Meyer Yttri

# FUNDS &FOCUS

I fuhnds I – noun a supply of money or pecuniary resources, as for some purpose; supply; stock

I foh-kuhs I –noun a central point, as of attraction, attention, or activity

Whatever your charitable giving goals, Legacy Foundation offers 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, Legacy Foundation offers the donor the highest level of benefits for charitable giving.

The following page lists funds that were established during the 2010-2011 fiscal year. For information about setting up a fund with Legacy Foundation, contact Harry J. Vande Velde at 219.736.1880 or hvandevelde@legacyfoundationlakeco.org.

"If you think of life as a big pie, you can try to hold the whole pie and kill yourself trying to keep it, or you can slice it up and give some to the people around you, and you still have plenty left for yourself."

-Jay Leno

# **ARTS&CULTURE**

JoAnn and Chuck Long Endowment Fund

# COMMUNITY DEVELOPMENT

Highland Community Foundation
Highland Community Foundation
Endowment Fund
Lake Court House Fund

# **DONOR ADVISED**

Nancy K. Johnson Advised Fund

# **EDUCATION**

Hammond Education Foundation Fund

# HEALTH& HUMAN SERVICES

Laini Fluellen Charities Inc. Fund Medical Specialists Foundation Fund



# **RELIGIOUS**

Catholic Foundation for the Diocese of Gary-Anne Verbeke Scholarship Fund Catholic Foundation for the Diocese of Gary Scholarship Fund-Bishop Carl Mengeling School **Endowment Fund** Catholic Foundation for the Diocese of Gary–Cathedral of Holy **Angels Endowment Fund** Catholic Foundation for the Diocese of Gary-Helen Pukoszek Scout **Educational Scholarship Fund** Catholic Foundation for the Diocese of Gary-St. Stanislaus Kostka **Endowment Fund** Catholic Foundation St. Thomas More—Andrean Scholarship Fund

# **SCHOLARSHIPS**

The Good Teachers Count Fund

# YOUTH

Daniel Chavez Memorial Fund Foster Friends Foundation Fund

Photo: Meloniece Phillips helps sort items at the Sojourner Truth House through the TradeWinds Services—Youth Employment Readiness Program

# GRANTS

I grahnts I –noun something granted, as a privilege or right, a sum of money, the act of granting

Legacy Foundation is Lake County's philanthropic partner. We achieve our mission by building a community endowment, addressing needs through grantmaking, and providing leadership on key community issues. During 2010-2011, Legacy Foundation made high-impact grants in the areas of arts & culture, community development, education, the environment, health and human services, recreation, and youth services. Legacy Foundation will continue to partner with local nonprofit organizations to create transformational grants.

For information about Legacy Foundation's grantmaking process, visit our web site at www.legacyfoundationlakeco.org/grants.html.

"The value of a man resides in what he gives and not in what he is capable of receiving."

Albert Einstein

# ARTS&CULTURE

# LAKE COUNTY COMMUNITY FUND

Northwest Indiana Symphony Orchestra
South Shore Arts
DONOR ADVISED GRANTS
Chris and Dede Morrow Fund South Shore Arts\$5,000.00
Gary and Sandy Neale Fund South Shore Arts\$2,504.00
Jack and Sara Dietrich Fund South Shore Arts\$1,941.00
Miller Community Fund South Shore Dance Alliance\$2,700.00
Nancy K. Johnson Advised Fund  Northwest Indiana Symphony Orchestra
Norma J. and John M. Cain, Jr. Fund South Shore Arts\$306.00
Orval O. and Margaret Haag Salon Show Fund South Shore Arts
South Shore Arts South Shore Arts Fund
Tom Sourlis and Sue Eleuterio Donor Advised Fund Chicago Public Art Group
Van Eekeren Family Scholarship Fund

South Shore Arts .......\$3,881.00

### **ENDOWMENT DISTRIBUTIONS**

Chorus Angelorum	
Chorus Angelorum Endowment Fund	\$643.00
Richard W. and Wanda L. Gardner Endowment Fund	
South Shore Arts	\$4,082.00

# COMMUNITY DEVELOPMENT

# LAKE COUNTY COMMUNITY FUND

Neighborhoods, Inc. \$15,000.00 Install 40-50 "micro-parks" in East Chicago, Hammond and Highland to encourage community building and the re-establishment of neighborhood networks

# JOHN S. & JAMES L. KNIGHT FOUNDATION DONOR ADVISED FUND

### MARIA M. REINER SENIOR CITIZENS TRUST

Funds for the completion of a creative renovation and the purchase of furnishings for a dedicated Senior Center located in the library of the former Hobart Middle School

Photo: A School City of East Chicago teacher, a recipient of an East Chicago Education Foundation mini-grant, and her students get excited about learning. The nonprofit organization finances innovative projects developed and proposed by teachers to embrace the learning process of their students, and provides financial support for teachers' professional and personal enrichment. The East Chicago Education Foundation was a 2011 participant in Legacy Foundation's Great Lake Award Initiative.



# **DONOR ADVISED GRANTS**

Anonymous Fund First United Lutheran Church
<b>Dyer Community Foundation Fund</b> Dyer Community Foundation \$2,500.00
Lake Court House Fund\$20,000.00Lake Court House Foundation, Inc.\$20,000.00Legacy Operating Reserve Fund\$5,000.00
Marian Berry Scholarship Fund – YWCA YWCA of Gary\$5,000.00
Merrillville Parks & Recreation Fund Merrillville Parks and Recreation Department
Northwest Indiana Habitat for Humanity Fund Northwest Indiana Habitat for Humanity\$2,831.56
Rotary Club of Gary Fund Lake Stevens Rotary Charitable Foundation\$1,520.00
<b>Tom Sourlis and Sue Eleuterio Donor Advised Fund</b> Neighborhood Writing Alliance\$10,745.00
ENDOWMENT DISTRIBUTIONS
Hammond Community Corporation, Inc. Hammond Community Corporation Endowment Fund\$83,547.00
Lake Area United Way Lake Area United Way Fund
St. John the Baptist Catholic ChurchSt. John the Baptist Church Fund\$637.00St. John the Baptist Church Organ Fund\$637.00
Westminster Presbyterian Church Westminster Presbyterian Church Fund
Whiting/Robertsdale Comm. Improvement Corp. Whiting/Robertsdale Comm. Improvement Corp. Endowment Fund

# **EDUCATION**

LILLY ENDOWMENT COMMUNITY SCHOLARSHIP PROMOTIONAL GRANT FUND The National Center for College Costs
For 2010-2011 programming in Lake County
DONOR ADVISED GRANTS
Challenger Learning Center of Northwest Indiana
Challenger Spark Your Imagination Fund
Leonard and Mildred Millies Fund
Valparaiso University\$1,400.00
Mary Anne Hannah Fund
Gary Educational Development Foundation, Inc
Merrillville Breakfast Kiwanis Club Educational Attainment Fund
The Dictionary Project\$979.20
Miller Community Fund
Wirt-Emerson School Close-Up Program\$1,500.00
Milton & Ruby McClendon Memorial Education Fund
Hammond Education Foundation\$624.88
The Morrow Family Fund
Calumet College—Dennis and Leslie Rittenmeyer Scholarship Fund\$5,000.00
Nancy K. Johnson Advised Fund
Calumet College—Dennis and Leslie Rittenmeyer Scholarship Fund\$100.00
Challenger Learning Center of Northwest Indiana\$250.00
Rotary Club of Gary Fund
The Dictionary Project\$150.00

# **ENDOWMENT DISTRIBUTIONS**

Challenger Learning Center of Northwest Indiana Challenger Learning Center of NWI Endowment Fund	\$1,183.00 \$2,266.00 \$1,594.00 \$880.00 \$228.00 \$8,935.00 \$445.91
Calumet College of St. Joseph Bank Calumet Fund (Calumet College) Calumet College of St. Joseph Endowment Fund Chase Fund (Calumet College)	\$11,938.00
Ivy Tech Foundation Chase Fund (Ivy Tech State College) Chase Fund 2 (Ivy Tech State College) USX Foundation Fund (Ivytech)	\$1,922.00
Purdue Foundation Calumet Gloria Hubaceck Duckworth Fund	\$6,612.00
Valparaiso University Valparaiso University Fund	\$756.00

# **ENVIRONMENT**

# LAKE COUNTY COMMUNITY FUND

Dunes Learning Center	
Indiana University Northwest\$4,500.0	00
Support for the printing costs of the publication <i>Dreams of Duneland</i> , a coffee table book featuring	
several hundred color and historic photographs of the Indiana Dunes	

# **DONOR ADVISED GRANTS**

Anonymous  Dunes Learning Center	\$2,500.00
Dunes Learning Center Education Fund  Dunes Learning Center	\$471.00
Indiana Dunes Environmental Learning Center Tuition Assistance Fund Dunes Learning Center	\$1,500.00
Pamela Meyer Yttri Donor Advised Fund Taltree Arboretum & Gardens	\$1,000.00
ENDOWMENT DISTRIBUTIONS	
Heinze Land Trust, Inc. Shirley Heinze Land Trust Fund	\$1,080.00

# HEALTH&HUMAN SERVICES

# LAKE COUNTY COMMUNITY FUND

Center for Possibilities	
Meals on Wheels of NW Indiana, Inc.  To address emergent meal needs due to the increased number of individuals in economic the long waiting lists for federally funded programs in Northwest Indiana	
Power Paws For Kids, Inc	\$1,000.00
Sojourner Truth House  Support for the "Nonviolent Communication Training Project" that creates opportunities and reconciliation, teaches strategies for diffusing conflicts and building authentic connecthers, and tends to the needs of individuals through compassionate listening	for healing
St. Jude House	
The Compassionate Friends  To purchase a copy machine to produce the support group's monthly newsletter.	\$2,622.00

# JOHN S. & JAMES L. KNIGHT FOUNDATION DONOR ADVISED FUND

# MARIA M. REINER SENIOR CITIZENS TRUST

Health Care Advocacy Group (HCAG)	
Hobart Family YMCA  Continued support for the successful transportation program, "Hobart Senior Taxi Program	
Hobart Food Pantry  To assist with increased costs of weekly food expenses due to increased demand in the sercitizen community	



Photo: Hobart citizens enjoy spending time together at the new Maria Reiner Center. The city's first dedicated senior center was established and furnished primarily through significant grants from the Maria M. Reiner Senior Citizens Trust, managed by Legacy Foundation.

# **DONOR ADVISED GRANTS**

Anonymous Fund American Heart Association\$100.00
Anonymous Fund—Hobart Hobart Food Pantry\$5,000.00
Trinity Evangelical Lutheran Church and School
Bryce Scott Handley Memorial Fund Funeral Assistance \$2,000.00
Chris and Dede Morrow Fund Lake Area United Way\$3,000.00
Nancy K. Johnson Advised Fund Sojourner Truth House\$250.00
Palmer C. Singleton Jr. Fund  NWI Volunteer Lawyers, Inc
ENDOWMENT DISTRIBUTIONS
Catholic Charities of the Diocese of Gary Catholic Charities Diocese of Gary, Inc
Dr. Leo & Arlene Cooper Fund for Catholic Charities
Catholic Foundation for the Diocese of Gary
Catholic Foundation Diocese of Gary Scholarship Fund for Bishop Noll Institute\$2,378.00
Joseph Hagenow/Justin Tylka Memorial Scholarship\$253.00
Center for Possibilities  Center for Possibilities Fund
Community Cancer Research Foundation Frank Wright Memorial Fund
Cystic Fibrosis Foundation—Indiana Chapter
Frank Wright Memorial Fund\$5,000.00
Haven House Visiting Nurse Endowment Fund\$500.00
Hospice of the Calumet Area, Inc.
Frank Wright Memorial Fund

Humane Society Calumet Area, Inc. Humane Society of the Calumet Area, Inc. Fund	00
Lupus Foundation of America, Indiana Chapter, Inc. Visiting Nurse Endowment Fund\$500.0	00
Meals on Wheels of NW Indiana, Inc. Visiting Nurse Endowment Fund\$500.0	00
Nazareth Home  Dr. Leo & Arlene Cooper Fund for Nazareth Home	00
TradeWinds Rehabilitation Center, Inc.  John & Helen Sourlis Endowment Fund\$21,640.0	00
The Food Bank of Northwest Indiana Mary Anne Hannah Fund	00
Salvation Army Salvation Army of Lake County Fund	00
Samaritan Counseling Center Good Samaritan Endowment Fund of Lake County	00
Sojourner Truth House Visiting Nurse Endowment Fund	
St. Anthony Hospice Visiting Nurse Endowment Fund\$500.0	00
St. Anthony Medical Center, Inc. St. Anthony Medical Center Fund\$23,429.0	00



Photos (Top): Members of Emerge South Shore, an organization for young professionals, volunteer at a Habitat for Humanity build. Emerge South Shore is an initiative of Legacy Foundation begun in 2011. (Right) Hanover Central High School students Hayley Hartsough (left) and Taylor Hillegonds (right) participate in Legacy Foundation's Youth Philanthropy Council, intended to inspire the next generation of philanthropists.



# **RECREATION**

# MARIA M. REINER SENIOR CITIZENS TRUST

Hobart Education Foundation	\$1,000.00
Support for a social outing at County Line Orchard for grandparents and their grandchildren a	and
great-grandchildren	

School City of Hobart.....\$9,600.00

Funding for five events for senior citizens at Hobart High School during the 2011-2012 academic year

# **DONOR ADVISED GRANTS**

**Dyer Parks & Recreation** 

Dyer Community Foundation Fund.....\$382.00

# YOUTH

# LAKE COUNTY COMMUNITY FUND

Hammond Boys & Girls Club  To support the programs of The First Tee of Hammond offering life skills, healthy habits, and curriculum to Hammond Boys & Girls Club members	
NAACP-ACT-SO Program Support for the Afro-Academic Cultural Technological and Scientific Olympics Program	\$3,950.00
Our Family Center\$ Support for the After School Tutoring & Mentoring Program and Summer Day Camp Leaders Program for at-risk youth, ages 5-18	
TradeWinds Rehabilitation Center, Inc\$	40 000 00
To provide employment and job training services to Lake County youth ages 14-24 with limi work experience	
To provide employment and job training services to Lake County youth ages 14-24 with limi	ited

# JOHN S. & JAMES L. KNIGHT FOUNDATION DONOR ADVISED FUND

Central District Organization
Highly Flavored Ministry, Inc
DONOR ADVISED GRANTS
Parents as Teachers of Lake County, Inc\$10,000.00
ENDOWMENT DISTRIBUTIONS
Boys & Girls Clubs of Northwest IndianaBoys & Girls Clubs of NWI Fund\$9,773.00Gwendolyn Sargent Fund for East Chicago Katherine House\$2,074.00Ruth Cornwell/Boys & Girls Club-Hammond Fund\$6,409.00Seehausen/Boys & Girls Clubs of NWI Fund\$203.00
Boy Scouts of America-Calumet Council Calumet Council Boy Scouts of America Fund
Crisis Center Inc. Crisis Center Inc. Endowment Fund
Lake County Police D.A.R.E. Program Officer Jerry Volom D.A.R.E Fund
Southlake Children's Choir Southlake Children's Choir Fund
YMCA of Hammond Area Endowment Fund of YMCA of the Hammond Area\$480.00

# **COLLEGE READINESS FUND**

#### **ACT/SAT Prep and Golf Career Awareness**

#### **College Readiness in the Classroom**

#### **Indiana Academy for Parent and School Leadership**



Photo: Students in the Solid Life Youth Program of Educating to Excel enjoy a summer field trip to Chicago's Navy Pier. Legacy Foundation supports mentoring and college readiness activities through the Solid Life Youth Program for low-income, potential first-generation college students.



Photo: Program Director Brandon White instructs participants in The First Tee of Hammond's golf and life skills program. Legacy Foundation supports college readiness and ACT/SAT preparation programs at The First Tee of Hammond.

Making A Difference through Educational Empowerment (M.A.D.E.) GEMS–Giving Educational Meaningful Substance
Ready2Go–Charting for Success Communities In Schools of East Chicago
Solid Life Youth Program  Educating to Excel, Inc

# GREAT LAKE AWARD INITIATIVE

The Great Lake Award Initiative (GLAI) is an annual series of workshops designed to build and sustain robust organizations serving the community. Legacy Foundation has sponsored and organized this initiative since 2005. More than 50 area nonprofit groups have participated in the program.

Each year, the GLAI gives leaders of up to 20 Lake County nonprofit organizations of all sizes and with varying missions a unique opportunity to gain hands-on knowledge that they can put to use immediately. During 2011 the GLAI focused on maximizing organizational strengths and identifying extra capacity in these areas that can support improvement in other areas of the organization.

Legacy Foundation is pleased to recognize the following organizations that completed Great Lake Award training this year:

- » Adonia Community Service
- » Cedar Lake Ministries
- » Challenger Learning Center of Northwest Indiana
- » Drexel Foundation for Educational Excellence, Inc.
- » East Chicago Education Foundation
- » Gary Life Education Initiative Incorporated
- » Girls on the Run of Northwest Indiana
- » Habitat for Humanity of Northwest Indiana
- » Hammond Education Foundation
- » Indiana Writers Consortium
- » Highland Community Foundation
- » March of Dimes-Northwest Indiana
- » Meals on Wheels of Northwest Indiana
- » Samaritan Counseling Center
- » Sojourner Truth House
- » St. Jude House
- » The First Tee of Hammond
- » Urban League of Northwest Indiana
- » Women Empowered for Divine Destiny

### MAKE IT HAPPEN GRANTS

These grants provide the funds that enable Great Lake Award Initiative participants to achieve one of the benchmark goals identified in their work plan. The following awards were made to 2010 program participants.

Books, Brushes & Bands for Education	00.00
First Tee of Hammond\$1,0 Funding for a technology upgrade project	00.00
Hammond Education Foundation\$1,00 Funding to support a consultant to craft and deliver a succession plan to the organization	00.00
Meals on Wheels of NW Indiana, Inc. \$1,000 Support for the assessment of donor database software and developing a selection process	00.00
Northwest Indiana Habitat for Humanity	
Parents As Teachers of Lake County, Inc. \$1,000 Support for public communications IT	00.00
Save the Dunes Conservation Fund	
Sojourner Truth House\$1,0 Funding for "Coffee & Conversation" events	00.00
St. Jude House	00.00
Urban League of NW Indiana, Inc. \$1,000 Funding to support donor outreach in Lake, Porter and LaPorte counties	00.00



Photo: Vanessa Allen (right), president and CEO of the Urban League of Northwest Indiana, talks with a guest at Legacy Foundation's 2010 Community Reception. The Urban League is one of more than 50 Northwest Indiana nonprofit organizations that have participated in the Great Lake Award Initiative, and received a Make It Happen grant in 2010.

# SCHOLAR SHIPS

I skol-er-ship I –noun a sum of money or other aid granted to a student, because of merit, need, etc., to pursue his or her studies

Legacy Foundation is an excellent resource for students looking for financial help for college. The foundation manages more than 25 scholarship programs collectively offering hundreds of thousands of dollars each year in student aid. The following pages describe available scholarship programs and the accomplished young people who earned awards this year.

For information about scholarships managed by Legacy Foundation, visit our Web site at www.legacyfoundationlakeco.org/scholarships, or contact Sandy Nicholls at 219.736.1880 or snicholls@legacyfoundationlakeco.org.

"The function of education is to teach one to think intensively and to think critically. Intelligence plus character—that is the goal of true education."

-Martin Luther King, Jr.

**Roger Begnoche Scholarship** was established to encourage a young man to pursue a career in education or nursing at one of the area colleges or universities. Named for a mentor and coach of a donor who wished to remain anonymous, the award is \$4,000 a year and is renewable. This year's recipient is **Alexander Serrano**.

**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. The award is for \$2,000 the first year and can be renewed for three years at \$1,000.

**Webster Cornwell Memorial Scholarship** was established by Ruth Cornwell in memory of her husband. This four-year, renewable \$1,000 scholarship is awarded each year to a student graduating from Hammond High School. This year's recipient is **Almadelia Aragon**.

Hammond Common Council Scholarship is awarded to high school seniors graduating from schools located in Hammond. The recipients this year are: Nathan Akerman, Ta'Shanya Bone, Nicole Brandy, Juan Carrasco, Nathan Cichock, Sharissa Guerrero, Francisco Hernandez, Jr., Candice Manuel, Daniel Mata, Ashley Overton, Frank Robles, Kaelyn Shabaz, Darren Simpson, Abigayle Stern and Paul Szymkowski. Each of them is eligible to receive \$1,000.

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: Brooke Bonich, Christopher Brahos, Karl DeLange, Brooke Fargo, Sean Flannery, Kyle Gatlin, Elaine Hall, Douglas Hanenburg, Rebecca Johnson, Ryan Kabella, Samuel Kasmark, Tiffany Michaels, Matthew Miller, Thomas Moore, Jr., Cindy Rawley, Kathy Rawley, Benjamin Rose, Hannah Schutter, Erin Shikany, Kaitlyn Sintkowski, Marissa Smith, Kristina Soderquist, Sarah Spies, Ashley Spurr and Lisa Waldrop. Each of these students can receive \$1,000.

**Herbert R. Kocher Memorial Scholarship** was established by Mary Kocher in honor and memory of her husband. Herb was a volunteer for 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 **Shantell Smith**. She will receive \$500.

**Lake County Athletic Officials Association Scholarship** is awarded to children of members of the Lake County Athletic Officials Association. The recipients this year are **Jessica Elish** and **Joshua Long**. They will each receive \$500.

**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 award is nonrenewable and worth \$2,500.

**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 recipient is **Margaret Poling** with Hospice of the Calumet Area. It is a renewable scholarship for \$1,000.

**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 (left to right below): **Corrine Blackburn**, Hobart High School; **Elaine Pitsas**, Munster High School; **Shantell Smith**, Roosevelt Career & Technical Academy; **Michelle Sopetti**, Griffith High School; **Tyler VanLul**, Calumet High School. They are each eligible for \$2,000 for one year.



**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 **Shure-Nachelle Parrish**, Valparaiso University. She will receive \$1,000.

**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: **Sara Dora**, Merrillville High School; **Je'len Gilis**, Wirt/Emerson Visual and Performing Arts Academy; **Rose Mullaney**, Bishop Noll Institute; **Kimberly Reppa**, Hanover Central High School; **Kelly Rostin**, Crown Point High School; **Jeremy Washington**, Hammond High School. The scholarship pays for full tuition at any accredited Indiana college or university plus an annual stipend for books and required equipment.



Lake County's 2011 Lilly Scholars (L-R): Kelly Rostin, Sarah Dora, Jeremy Washington, Rose Mullaney, Kimberly Reppa, and Je'len Gillis



Patrick Lindsey Memorial Scholarship was created to honor Patrick, and to aid graduating minority high school seniors in Lake County 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 recipients are Shayla Austin (left) from Hammond High School and LaVontecia Gist (right) from Merrillville High School. They will each receive \$500. (Pictured with selection committee member Emanda 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 **Jessica Sinclair**, **Elaine Pitsas**, and **Daniella Tripodis**. It is a nonrenewable award of \$2,500.

**Barbara Miller Meeker Art Scholarship** was established by Barbara Meeker, a respected local artist, to encourage Munster High School seniors pursuing the visual arts. It is nonrenewable and worth \$500.

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 John McKinlay. He will receive \$1,000 for one year.

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 Litney Gray. She will receive \$1,000.

**D. J. And Rose Nidetz Scholarship** was established in the fall of 2007 for students who work on a production with a "Northwest Indiana Excellence in Theatre Foundation" Member Theatre. This year's recipient is **Braden Cleary**. He will receive \$500.

**June Pangburn Scholarship** was established in memory of June, who served as the Director of Nursing at St. Mary's Hospital in 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 **Lauren Richter**. She will receive \$1,000 for one year.

**Nancy J. Pinnick Memorial Scholarship** was established by the Pinnick family to continually recognize Nancy's 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 **Abby Anderson**. The award is for \$1,000 and is renewable for three additional years.

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, Ryan Merriman, Kelly Peloza, Kimberly Sherwin, Amanda Szura, and Christopher Zakian. The recipients receive up to \$3,000 this year and can reapply in future years.

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: Thomas Bebekoski, Meredith Dobes, Kristen Flens, Litney Gray, Shelbi Hardin, Mitchell Holloway, Lauren Jacobsen, Megan Kazmierski, Joshua Kisfalusi, Samantha Loza, Leslie Lundewall, Hannah McCormick, Kathryn Orr, Flor Padilla, Calvin Pullins, Bradley Qualizza, Nathan Schuster, Brandon Winberg and Adriena Wright. It is a \$500 award.

**Sengupta Family Scholarship** was established in memory of Ganapati Sengupta. This renewable scholarship is awarded to the valedictorian of Lake Central High School. The recipients this year are Anna Kacius, Erin Myers, Shloka Kini, and Bradley Trembacki. They are each eligible to receive \$1,000 for one year.

W. James Spicer Scholarship was established in 2007 through the generosity of Mr. Tom Sourlis to recognize the teaching career of Mr. James Spicer, who taught U.S. history in the Gary Community School Corporation from 1966 through 2007. This year's recipient is Benjamin Niksch. He will receive a one-time award of \$1,000

Dr. R. T. White Scholarship was established in memory of a beloved principal at Elliot Elementary School and is awarded each year to graduating students from Munster High School who attended Elliot Elementary. The recipients this year are Marelle Cerven and Bridget McCullough. The \$750 scholarship is for one year.

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 Alexa Candreva. She will receive \$2,500 for one year.



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"It is one of the most beautiful compensations of life that no person can sincerely try to help another without helping themselves."

-Ralph Waldo Emerson

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To reach us by phone, call 219.736.1880. To view complete biographies of our staff, please go to www.legacyfoundationlakeco.org/aboutstaff.html



# IN MEMORIAM

Cara M. Spicer (1953-2011)
Vice President, Program Officer,
Grants and Communications Officer, 2007-2011

Cara's life was too short. But it was full of love, spirit and joy. In grateful memory of her legacy to the people and the nonprofit organizations of Lake County, Indiana.

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