

Lake County's Community Foundation

ANNUAL REPORT 2013-2014

# Forest (n)

A community of living organisms characterized by the presence of different species of trees that have symbiotic relationships with each other and the environment.

Sounds a lot like Legacy Foundation's relationship with every person and organization listed in this annual report. We know it takes different types of trees to make our forest work. Thank you.





Every vacation I take along a book I want to read, that somehow is too difficult or intense to absorb during my brimming, everyday life. My most recent vacation read was "Birds Without Wings" by Louis de

Bernieres. In the book a soldier is describing his admiration for a great general, and says,

"Sometimes there is someone who is selected to be a lion or an eagle and...makes destiny...as if they have a greater knowledge of what must be done, and an understanding of the direction in which the world must go."

While the soldier was referencing a leader on the battlefield, it struck me that the people I meet in my philanthropic journey likewise have a greater knowledge of what must be done. Legacy's non-profit partners, Legacy's staff and board and most certainly the donors to the myriad causes that strengthen Lake County—all have a greater knowledge. There is no question our government is motivated to help the citizens of the United States and of Indiana.

But there is likewise no question the local nonprofit organizations supported by Legacy and by you have a clearer vision of need and opportunity in Lake County. Sojourner Truth House, for example, helps countless homeless mothers and children navigate their way to better lives, and they do it with more compassion, and more economically than the programs than are solely

government sponsored. Whether our philanthropic efforts provide drug treatment to a confused teen, a warm bed for the night, a nutritious meal, help with homework, the soaring joy of discovering something extraordinarily beautiful, preservation of our fragile ecology, or an opportunity to go to college, the work of every person, every fund and every organization mentioned in this annual report is valuable beyond measure to all the citizens of Lake County. Everyone involved is making a difference. Everyone reading this is a leader in the battles for progress. They are lions and eagles.

I am constantly delighted by the people I meet as the result of being on the board of Legacy Foundation. They are busy, smart, engaged, and self-effacing. They have energy and optimism. They are willing to take a stand and at the same time are willing to listen and collaborate. And now we all have more reasons than ever to commit our time, talent and treasure to philanthropy in Lake County.

Twenty-two years ago, Lilly Foundation recognized the power of our good intentions and provided the genesis funding for Community Foundations throughout Indiana, including Legacy. They are once again providing us all with an incentive to open our hearts and share our resources for the causes we believe in, with the GIFT VI Initiative, granting Legacy Foundation \$1,400,000 to match gifts made to Legacy. Please invest a few minutes to find out about this opportunity to leverage the impact of your philanthropic resources and goals.

Sincerely, Nancy L. Cilfford Chair, Board of Directors A Statement from Our Fund Manager

SEI is a Global company with U.S. headquarters in Oaks, Pennsylvania. SEI provides discretionary asset management and investment outsourcing solutions for institutional clients for more than 20 years. Pensions & Investments ranked SEI in the top 10% of money managers based on worldwide institutional client assets. As of June 30, 2014 SEI had \$249 billion in assets under management, \$79 billion of which were Institutional Assets. Nonprofit and asset allocation strategists join to create a portfolio focused on financial and organization goals. All portfolios actively managed to take advantage of market opportunities based on SFI's active view

Mark Norcini serves as the client portfolio manager for this account. He is responsible for providing advisory services to institutional clients regarding investment and risk management strategies and portfolio construction as well as overseeing administration of service-related functions for clients on a day to day basis. He has extensive experience leading clients through strategic and active asset allocation development over time. Mark has been at SEI for over eight years and has a broad knowledge of all the resources at SEI with a focus on investments.

Legacy Foundation became a client of SEI in May of 2013. Since joining SEI, Legacy Foundation's return since inception is 9.31% annualized as of September 30, 2014.

SEI Institutional Group-Client Portfolio Management



## Report of Our Independent Auditors

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

### **Report on the Financial Statements**

We have audited the accompanying financial statements of Legacy Foundation, Inc. (the "Foundation") which comprise the statements of financial position as of June 30, 2014 and 2013, and the related statements of activities and cash flows for the years then ended, and the related notes to the financial statements.

# Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

## Auditor's Responsibility

Our responsibility is to express an opinion on these financial statements based on our audits. We conducted our audits in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audits to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

### **Opinion**

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of Legacy Foundation, Inc. as of June 30, 2014 and 2013, and the changes in its net assets and its cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.



## **Financials**

#### **ASSETS**

|                             | 2014         | 2013 As Restated |
|-----------------------------|--------------|------------------|
| Cash and cash equivalents   | \$1,061,388  | \$780,692        |
| Certificates of deposit     | \$437,077    | \$435,153        |
| Investments                 | \$48,517,882 | \$45,541,564     |
| Other assets                | \$32,479     | \$1,895          |
| Property and equipment, net | \$54,594     | \$60,367         |
|                             | \$50,103,420 | \$46,819,671     |

#### LIABILITIES AND NET ASSETS

Temporarily restricted Permanently restricted

Total net assets

| Liabilities                        |                      |              |
|------------------------------------|----------------------|--------------|
| Accounts payable                   | \$23,808             | \$2,022      |
| Accrued expenses                   | \$7,257              | \$13,883     |
| Grants payable                     | \$82,609             | \$26,198     |
| Annuities payable                  | \$580,884            | \$604,472    |
| Custodial funds                    | \$ <u>10,578,087</u> | \$12,082,300 |
| Total liabilities                  | \$11,272,645         | \$12,728,875 |
|                                    |                      |              |
| Net assets                         |                      |              |
| Unrestricted:                      |                      |              |
| Operating                          | \$273,428            | \$376,574    |
| Board designated operating reserve | \$97,963             | \$93,397     |
| Deficiency in endowment funds      | (\$85,467)           | (\$413,084)  |

\$285,924

\$27,401,033

\$11,143,818

\$38,830,775

\$50,103,420

\$56,887

\$23,702,718

\$10,331,191

\$34,090,796

\$46,819,671

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# In the 2013-2014 year, donations totaled more than \$960,000 from 775 donors\*

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"Giving is an integral part of my spiritual growth. I am passionate

about ensuring Gary is a thriving community. Through my fund at Legacy Foundation, I can support many types of community services at a variety of organizations"

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In memory of Ronald E. Austgen Ms. Dorothy A. Austgen

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In memory of Glenn Gintert Mr. Ralph L. Fernandez In memory of Juanita Kutka and Jim Hornak Mrs. Robin Gintert

## **Highland Community** Foundation Fund

In memory of the Ashley Ritz Memorial

Mr. and Mrs. Ronald Ritz

## Kathy Lynn Hooks Memorial Scholarship Fund

In memory of Kathy Hooks River Forest Teachers Association

## **Humane Society Calumet Area**

In memory of Emma, Astro and Jack Anonymous

## IBEW Local Union #697 Memorial Scholarship Fund

In memory of: Thomas Johns Douglas Van Wienen Wayne Underwood Dominic Vicari, Jr. Omer Stone Joseph Spicca

## Kreitzburg Cemetery Fund

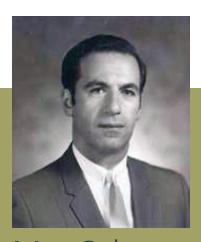
In memory of Marlene Nissen and **Dorothy Spies** Mr. Verne P. Seehausen, CPA

## Lake County Athletic Officials Association

In memory of: Glenn Brennan's Mother Walter Kokidko Andy Simpson's Brother George Marciniak's Father Randy Parker's Mother Jeff Cox's Mother Bryan Vowell's Brother Bob Schellinger's Brother Tom Herbert's Father Michael Bato's Mother

## **Legacy Foundation Operating Fund**

In memory of Ed and Clara Bapple Ms. Sandra F. Bapple



Max Cohen November 15, 1926-May 30, 2014

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In memory of Patrick Lindsey
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In memory of Mr. Lenwood Lindsey
Ms. Carlotta King

# Meals on Wheels of NW Indiana, Inc. Fund

In memory of Richard Garretson,
Brian Mathias and Barbara Wilson
Mr. and Mrs. Lewis H. Noe
In memory of Richard Garretson,
W. Brian Mathias, Dan Lavrick, Jim
Jakich and Diane Misch
Mr. Verne P. Seehausen, CPA
In memory of Marjorie L. Ryan, a
big fan of Meals on Wheels
Mr. George D. Ryan
In memory of Norah McFarland
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In memory of Karen Giordano

## John and Myrna Newgent Stewardship Program

In memory of John Newgent Ms. Myrna Newgent

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

In memory of Mary A. Volom
Ms. Karen S. Biggs
Rev. and Mrs. Jeffrey Coester
Mr. and Mrs. George Karras
Mr. and Mrs. Dean Sangalis
Mr. and Mrs. Christopher Skoczylas
Mr. Brad Stewart
Mr. and Mrs. Andrew Tanzillo
Mr. Victor S. Volom
Ms. Sherri Zimmer

## Nancy J. Pinnick Scholarship

In memory of Nancy Pinnick
River Forest Teachers Association

## Alexandra Gardner Riddle Fund

In memory of Alex G. Riddle Mr. John Cain

## Wilbert and Olga Seehausen Fund

In memory of Barry & Laura Basham, Lenore Barman, Alice Malsch, Thespena Megremis, and Emil Strong, Jr.

Mr. Verne P. Seehausen

## **Shifting Sands Documentary Fund**

In memory of Cara Spicer Mr. Stephen Spicer In memory of Susan Smith Ms. Cynthia Malone

## Palmer C. Singleton Jr. Fund

In memory of my father, Palmer C. Singleton, Jr.

Ms. Sarah M. Singleton

#### Womenade Fund

In memory of Richard Houk and to Mary's hard work Lawrence M. Gingrich



## DR. JOHN T. SCULLY MEDICAL SCHOLARSHIP FUND



March 10, 1924– November 19, 2013

Dr. Scully practiced medicine in Lake County, Indiana, for almost five decades, making a positive difference in the lives of thousands of area residents. He was truly a leader in every aspect of his life. The Dr. John T. Scully Medical Scholarship Fund was established by longtime friends to honor Dr. Scully on his retirement. The award is based on both financial need and academic record. The recipient must be a resident of Lake or Porter County and attending the Indiana University School of Medicine at IU Northwest.

## HOW TO APPLY

Contact the IU Northwest Financial Aid Office, recommendations are made from the selection committee of the Indiana University School of Medicine at IU Northwest.

In memory of Dr. John T. Scully

Mr. John L. Ames

Mr. and Mrs. Thomas V. Anderson

Ms. Dawn M. Bailey

Ms. Sandra K. Bardeson

Mr. John R. Barney

Mr. and Mrs. Lawrence Battistini

Ms. Joy Becker

Mr. and Mrs. John R. Birdzell

Ms. Melanie Brown Davis

Mr. and Mr. Joseph Brunini

Mr. and Mrs. Ted S. Byers

Mr. and Mrs. John E. Chevigny

Dr. and Mrs. Oren Conway

Mr. and Mrs. Mark Cooper

Mr. and Mrs. William Dorulla

E.C. Babilla, Inc.

Mr. and Mrs. F. Ritchey Eibel

Mr. and Mr. William Eichhorn

Mr. and Mrs. John Fadel

Franciscan Alliance

Ms. Dodee Frost Crockett

Mr. and Mrs. Douglas Ganson

Mr. and Mrs. Tim Garigai

Mr. and Mrs. Arnie Gough

Hall Prangle & Schoonveld, LLC

Mr. Eric Hines

Mr. Brian Kennedy PH.D.

Mrs. Mary M. Kocher

Mr. Mark Lazart

Life Spine

Ms. Yvonne Lowe

Mrs. Shirley A. Lucas

Ms. Bunty MacDonald

Mr. Shawn Dickt

Mr. and Mrs. Robert Malinich

Mr. James A. Markus

Ms. Leslie Martino

Dr. and Mrs. Robert S. Martino

Ms. Donna J. Marulic

Ms. Teri McCormick

Ms. Deborra A. Mlynarcik

Ms. Carol L. Myers

Ms. Amanda Nelms

Mr. and Mrs. Robert Nutt

Ms. Margaret M. O'Drobinak

Stacey and David Olesky

Ms. Marjorie S. Pawlik

Mr. Jack Peiffer

Mr. and Mrs. Jeff Pierce

Mr. and Mrs. Donald S. Powers

Pulmonary Specialists of

Northwest Indiana

Ms. Jean J. Reed

Ms. Carolyn M. Ribordy

Ms. Michelle Robberson

Mr. and Mrs. Tyrie Robbins

Mr. David Rzepczynski and

Mrs. Mary Bonn

Dr. and Mrs. Hakam Safadi

Mr. Jeremy Salmon

Mr. Eric F. Schulte

Ms. Dolores R. Soich

Dr. Lowell H. Steen

Mr. and Mrs. Cory M. Sutker

Mr. William Theodoros

Mr. and Mrs. James Thomas

Ms. Kathie Tubaugh

Mr. and Mrs. Ramakrishnan Unni

Mr. Scott Vidimos

Dr. and Mrs. George J. Volar

Ms. Jane Walker

Mr. and Mrs. Bruce White

Mr. and Mrs. Richard P. Zondor



"Community foundations are an excellent means to support a charitable cause forever."

# Verne P. Seehausen CPA Legacy Foundation Board Emeritus

## **HONORARY GIFTS**

# A Bunch of Responsible Guys Fund

In honor of Tory Prasco Ms. Nancy Clifford

## Cara M Spicer Fund

In honor of Steve Spicer's Retirement

Ms. Cynthia Fredrick Allen and Nancy Johnson In honor of Cara's mum Eva Mr. Stephen Spicer

# Seehausen/Boys & Girls Clubs of NWI Fund

In honor of the birth of Lucas Shane Kreke, Colin Fisher and Jacob Brozovic

Mr. Verne P. Seehausen CPA

## Olga C. and William H. Brinkman Fund

In honor of Ed and Mary Ann Karwatka

Ms. Monica M. Drzewiecki

## **Hobart Community Fund**

In honor of Bill Hancock Ms. Jennifer Hollabaugh

### **Humane Society Calumet Area**

In honor of Timmy
Ms. Stephanie Peters

## Miller Community Fund

In honor of Ken Wyatt Ms. Rebecca L. Wyatt

### Palmer C. Singleton Jr. Fund

In honor of the fine efforts of Judy Stanton in providing pro bono legal representation to the deserving folks in NWI

Ms. Teresa Massa

## **Shifting Sands Documentary Fund**

In honor of Bessie and Willard Silverthor

Mr. James Northey In honor of The Spirit of Lake Michigan

Anonymous
In honor of the all the children who
have enjoyed the fun of exploring
the dunes

Mr. Ronald Knickrehm

#### Womenade Fund

In honor of Susan Cohen, AFP Philanthropist of the Year Teresa Sanders Douglas Van Wienen

Wayne Underwood Dominic Vicari, Jr. Omer Stone

Omer Stone Joseph Spicca



## FRIENDS,



This past year has been very exciting. The Legacy Foundation has launched a new initiative called, "Neighborhood Spotlight." The Neighborhood Spotlight initiative is a new multi-year endeavor to shift from a solely transactional type of a grant making to a more transformative method of grant making.

What is unique about Neighborhood Spotlight? It focuses on encouraging communication and collaboration within neighborhoods. The goal is to help communities identify

the projects and activities, which will help improve quality of life, in ways that are specific and unique to their neighborhoods. Each neighborhood has distinctive challenges and opportunities. Hence, instead of proposing specific changes to a neighborhood, Legacy is providing a framework for change centered on collaboration and collective impact, with measurable goals and outcomes.

Throughout 2014, neighborhoods participated in three required training programs designed to help neighborhoods learn how to collaborate, and understand some of the great assets in their communities.

I would like to thank the Knight Foundation, Legacy Board of Directors, Legacy Staff, Neighborhood Spotlight Taskforce, Indiana Association of Community and Economic Development, and the Neighborhood Spotlight Selection committee for all of their support, guidance, and many contributions toward this common vision of a greater Northwest Indiana.

You can participate as well. The Neighborhood Spotlight initiative provides a wonderful opportunity to create a new fund at Legacy Foundation that is focused on that neighborhood for which you may have a special and personal affinity. It is expected that 2015 will be equally exciting, as entire neighborhoods are engaged in a proactive and inclusive community planning process.

Give. Lead. Make a Difference

Robert E. Johnson, III Vice-Chairman, Legacy Foundation

Pictured Neighborhoods (Top to bottom): East Chicago, Gary-Horace Mann, Gary-Miller, Griffith, Highland and Hobart

# NEIGHBORHOOD SPOTLIGHT



Neighborhood Spotlight is Legacy Foundation's Collective Impact approach to grant-making. It is a comprehensive community development initiative comprised of three key ideas:

ONE

**ORGANIZE** (Community Building)

TWO

**DECIDE** (Planning)

THREE

**ACT** (Implementation/Social Contract)

## What is Collective impact?

The commitment of groups from different sectors to a common agenda for solving a complex social problem. In order to create lasting solutions to social problems on a large-scale, organizations—including those in government, civil society, and the business sector—need to coordinate their efforts and work together around a clearly defined goal.

## Why Collective Impact?

Collective impact is a significant shift from many funders' current paradigm of "isolated impact," because the underlying premise of collective impact is that no single organization can create large-scale, lasting social change alone. There is no "silver bullet" solution to systemic social problems, and these problems cannot be solved by simply scaling or replicating one organization or program. Strong organizations are necessary but not sufficient for large-scale social change.

# What was the process for selecting communities?

Legacy Foundation hosted a series of trainings and technical assistance sessions (picture on the right) from January-August 2014 to educate neighborhood groups about the collective impact. Interested communities selected a convening non-profit organization to act as the backbone for a neighborhood and community driven strategy. Applications for neighborhoods interested were due September 1, 2014.

## What communities were selected?

Hobart and Gary's Miller Neighborhood were selected for the first round of funding.

## What are the next steps?

Beginning in January 2015 the selected convening organizations will hire a community builder, assemble a local steering committee, and move through a comprehensive community development process for their neighborhoods. In addition, Legacy will repeat the cycle and provide Collective Impact trainings in 2014 to communities interested in being selected as 2016 Neighborhood Spotlight grantees.

"The Legacy Foundation, through Neighborhood Spotlight, has created the conditions for a success: an influential champion, adequate financial resources to begin, and a sense of urgency for change. Together, these preconditions created the opportunity and motivation necessary to bring people who have never before worked together into relationships and hold them in place."

## **Andy Frazier**

Executive Director
Indiana Association of Community Economic Development





# PROGRAMS: CAPACITY BUILDING

The Legacy Foundation's Capacity Building Grant provides funding for nonprofit activities that strengthen operations. Legacy created capacity building grants because we believe great programs need great organizations behind them.

Common areas in which nonprofits seek to improve capacity include: technology, back office management (i.e. accounting, human resources), fundraising, advocacy, communications, governance, leadership development, and volunteer recruitment and development.

| Books, Brushes & Bands for Education   | 500 |
|--|-----|
| Boys & Girls Clubs of Northwest Indiana  | 000 |
| Campagna Academy\$2,0  Development Planning  | 000 |
| Emerge South Shore\$2,0<br>Strategic Planning Process  |     |
| Food Bank of NWI \$2,0<br>Staff Development  |     |
| Gary Life Education Initiative Incorporated\$2,0<br>Staff Recruitment Plan/Donor Path Services |     |
| Hammond Education Foundation\$2,0<br>Succession Planning                                       | 000 |
| Humane Society Calumet Area\$2,0<br>Legal Counsel and Board Governance                         |     |
| Indiana Ballet Theatre   | 500 |
| Indiana Dunes Environmental Learning Center  |     |
| Indiana Writers Consortium\$2,0 Fundraising Plan   | 000 |

| Meals on Wheels of North<br>Develop a Planned Giving                                      | west Indiana<br>Program  | \$1,235 |
|---|--|---------|
| Northwest Indiana Cancer<br>Building Outreach and Aw                                      | Kidsareness  | \$1,960 |
| Old Sheriff's House Founda<br>Increase Meeting Space Ca                                   | ationapacity   | \$2,000 |
| Urban League of Northwes<br>Board Retreat   | st Indiana   | \$2,000 |
| Woodland Child Developm<br>Professional Development                                       | nent   | \$1,731 |
| Another Chance Outreach Center  |  |         |
| East Chicago Carnegie Arts  |  |         |
| Friends of Emerson Visual and Performing Arts   |  |         |
| Girls on the Run of Northwest Indiana\$1,200  DonorPath fundraising services for one year |  |         |
| Habitat for Humanity of Northwest Indiana   |  |         |
| Hammond Education Foundation  |  |         |
| Indiana Parenting Institute<br>DonorPath fundraising ser                                  | vices for one year   | \$1,200 |
| nother and  | International Institute/ LACASA  DonorPath fundraising services for one year | \$1,200 |
|   | South Shore Dance Alliance   | \$1,200 |



DonorPath fundraising services for one year

"With a microgrant from the Legacy Foundation, I was able to get the tools, expertise and coaching to raise more money without increasing expenses." **Gail Rodovich** on DonorPath's Fundraising Readiness Project , Hammond Education Foundation









Emerge South Shore is a group sponsored by Legacy Foundation for young professionals in their early 20s to late 30s. Emerge South Shore promotes leadership and personal development through networking, community involvement, and educational opportunities.

Founded in 2011, Emerge South Shore's mission is to identify the emerging leaders and young professionals of Northwest Indiana, connect them with each other and current leaders in the community, develop their ability to serve as community trustees, and engage them within the community.

In 2014, the Emerge South Shore members went through a Strategic Planning process to determine how to move the group into its next phase of growth, sustainability, and philanthropy. From that process, it was determined that a partnership between Legacy Foundation and United Way of Northwest Indiana would create new and innovative opportunities to promote community philanthropy, leadership, and the ability for the next generation of Northwest Indiana leaders to make an impact.

Legacy Foundation is excited to embark on this next phase of Emerge South Shore in 2015!



# Gary Counts. All the data that matters to your neighborhood, in one place. See how we turn your issues into actions.

With a \$40,000 Knight Community Information Challenge grant from the John S. and James L. Knight Foundation, Legacy Foundation and the City of Gary worked together to bring city data online and engage residents in the process of combatting blight and revitalizing their neighborhoods.

Funding from the Knight Foundation and Legacy Foundation helped the City integrate its data with Civic Insight's Blight Status to provide residents with data on vacant properties and enable better code enforcement by the city of Gary.

### **Key Activities throughout 2013-14**

Consultants integrate Blight Status tool and City of Gary data

- » Chandler Decision Services
- » Civic Insight

» DataMade

» LocalData

» V as in Victor

## Develop and test integrated technology

- » Parcel Survey—University of Chicago/LocalData
- » Hardest Hit Properties LocalData/Civic Insight

## Launch Garycounts.org

» Legacy hosts Gary Hack Nights (pictured middle and bottom) for cross-section stakeholder and citizen participation











# ONLINE GIVING INITIATIVES

Legacy Foundation spans a twenty year history of donor relations and fund management in Lake County. We hold \$50 million in assets and have awarded \$30 million grants and scholarships. Each year, we meet with approximately 150 nonprofits to provide technical assistance and problem-solving services.

Our goal for the Giving Day Initiatives was to raise awareness about the great work of our not-for-profit partners and incentivize donors to give online, now. We wanted to show our fund holders, donors and community that giving through your community foundation is valued and has an impact whether that gift is \$25 right now or \$250,000 later.

Legacy hosted two of the three online giving events with a generous \$100,000 grant from the John S and James L. Knight Foundation.



In 2013, Legacy Foundation raised over \$120,000 through a 6-week campaign from November 14—December 31, for 139 funds held at the foundation. With the funds from Knight Foundation, Legacy was able to provide an additional \$35,000 in matching dollars and prize incentives, generating over \$157,000 for Legacy Foundation funds.



On February 12, 2014, Legacy Foundation hosted NWIgives in collaboration with Lake Area United Way and several other great partners, which generated over \$248,000 in donations in just 24 hours for 88 nonprofits in Lake, Porter and La Porte counties! With Knight Foundation support, nonprofits participating in NWIgives shared in \$45,000 of incentive prizes.



Then, on May 6, 2014, Legacy Foundation celebrated the 100th anniversary of community foundations alongside Crown Point Community Foundation, Porter County Community Foundation, Unity Foundation and community foundations throughout the country with Give Local America



# Lake County Community Fund

The Lake County Community Fund is supported through the generosity of a wide-base of donors. Through this fund, Legacy Foundation supports organizations providing services to Lake County, Indiana residents in the areas of arts and culture, education, environment and animal welfare, health and human services.



East Chicago Carnegie Performing Arts Center

Cedar Lake Park Foundation ......\$1,497

Equipment to play "Taps" as well as other musical tributes to honor veterans at the Park of the Red Cedars and Red Cedars Museum. Area of Impact: Human Services

Center of Workforce Innovations Inc.....\$25,000

The Skill Building Institute aims to build confidence and positive employer-ready attitudes/skills in 25 discouraged, long-term unemployed professionals in Lake County. Participants will learn and apply employable skills and attitudes through innovative curriculum, hands-on workshops, and a paid internship. The goal is to move participants from long-term unemployment into sustained employment. Area of Impact: Human Services

Chorus Angelorum Inc......\$6,000

An evening of music featuring mostly Baroque masterpieces. The centerpiece of the concert is the "Magnificat" by Johann Sebastian Bach for orchestra, chorus, and soloists. Area of Impact: Arts & Culture

City of Crown Point......\$1,477

Equipment to play "Taps" as well as other musical tributes to honor veterans at the Historic Maplewood Cemetery. Area of Impact: Human Services

City of Hobart ......\$2,953

Equipment to play "Taps" as well as other musical tributes to honor veterans at the Doughboy Monument site and the Veteran's Park site. Area of Impact: Human Services

| City of Whiting\$3,000 Equipment to play "Taps" as well as other musical tributes to honor veterans at the Whiting Lakefront Park and Memorial at 119th Street  | Gary Life Education Initiative Incorporated   |
|---|---|
| and Oliver. Area of Impact: Human Services  Community Foundation  | preparing for high school, graduating high school, preparing for college, graduating college and transitioning to a successful career. Students learn the importance of education and giving back to their community. Area of Impact: Education |
| Human Services  Dunes Dog Training Club, Inc  | Giving Backpack Foundation  |
| and caring for their dogs, instead of their own issues. This program helps Veterans gain confidence to once again be productive members of our community. Area of Impact: Human Services  | Habitat for Humanity of Northwest Indiana, Inc  |
| Early Learning Partnership of Northwest Indiana   | or permanent wood structures for residents of Lake County who<br>meet the financial and medical need requirements. Area of Impact:<br>Human Services  |
| families with children prenatal to kindergarten entry. Model components include personal home visits, group connections, development and health screenings, and resource networking utilizing research-based and neuroscience infused curriculum as the foundation. Area of Impact: Education   | Habitat for Humanity of Northwest Indiana, Inc  |
| East Chicago Carnegie Performing Arts Center Inc  | Hammond Development   |
| First Christian Reformed Church - Teen MOPS\$3,000 This program helps young mothers reach goals pertaining to education, employment, and parental confidence by providing support emotionally and financially. Life skill workshops occur three times a month and are open to mothers under 23 years of age. Area of Impact: Human Services | Hammond Education Foundation Inc  |

comprehension. Area of Impact: Education

| Highland Parks & Recreation Department  | International Institute of Northwest Indiana Inc |
|---|--|
| Indiana Dunes Environmental Learning Center Inc\$25,000  Dunes Learning Center operates in partnership with Indiana Dunes  National Lakeshore to provide children with standards-based outdoor education that inspires curiosity, scientific literacy, and environmental stewardship. Funds support Naturalist Interns, who are critical to delivering meaningful outdoor experiences to campers from Lake County, Indiana. Area of Impact: Education | Kids Against Hunger-Greenwood                    |
| Indiana Lincoln Highway Association Inc   | Life Skills Thru Golf Inc                        |
| Indiana Parenting Institute Inc   | Human Services  MAAP Services Inc                |
| Indiana Women In Need Foundation Inc  | Meals On Wheels Of Northwest Indiana Inc         |
| of Impact: Health   | North Township Trust\$3,000                      |

North Township Trust......\$3,000 Equipment to play "Taps" as well as other musical tributes to honor

veterans at the Oak Hill Cemetery and Wicker Memorial Park sites.

Area of Impact: Human Services

| Northshore Health Centers Inc                                | Shirley Heinze Land Trust Inc   |
|--|---|
|  | Sojourner Truth House   |
| placement. Area of Impact: Education  Planting Possibilities | fiscal year (31,000 in Lake County). Area of Impact: Arts & Culture  South Shore Convention Visitors Authority                        |
| School City Of Hobart Parents as Teachers                    | a way of coping and guidance during their families stay. Area of Impact: Human Services  Taltree Arboretum And Gardens Foundation Inc |
|  | United Pentecostal Church International Inc   |





## Knight Foundation Fund

The Knight Foundation Fund at Legacy Foundation supports the success of our informed and engaged urban communities with a focus on Gary neighborhoods through investments that attract, retain and harness talent; that expand opportunity by increasing entrepreneurship and economic mobility; and that support civic infrastructure to accelerate the growth of ideas and bring people from diverse social and economic backgrounds together.

Promoting civic innovation and robust engagement will enable our communities to succeed in a rapidly changing world. We want our investments to inspire the actions of residents in the Gary community and help us build a better democracy and a successful future.

Hoosier Environmental Council Inc .......\$20,000 Pilot Project and Needs Assessment for Environmental Justice and Revitalization (EJR) Initiative: Central to Rebuilding Lake County. Area of Impact: Environment/Animal Welfare

Welfare

Indiana Association for Community Economic Development....\$70,000 Designing a Neighborhood Spotlight grant program with Legacy Foundation that works as a community development capacity building program with additional dollars for implementing strong community based ideas. Area of Impact: Human Services

"Legacy staff members have been attentive to the arts district's challenges and they have been personally involved in helping the arts district establish and meet its goals.

Importantly, Legacy has been helpful in coordinating a working relationship among citizen groups with interests in Miller and establishing priorities for the arts district."

Miller Beach Arts & Creative District

## Maria Reiner Senior Citizens Trust

The Maria Reiner Senior Citizens Trust at Legacy Foundation grants to organizations providing senior citizens in Hobart, Indiana with opportunities for housing, health care, economic security, education, employment, transportation, companionship and recreation.

Maria Reiner's generous gift to Legacy Foundation ensures that Hobart seniors live in a vibrant community with access to the support and services they need.

## Hobart Arts League Inc.....\$3,500

To bring building up to code, update handicapped bathrooms, repair or replace main doors, replace windows and air condition units. Area of Impact: Arts & Culture

### Linden House of Hobart, Inc.....\$12,618

Offer exercise equipment to our seniors to promote and maintain physical fitness. The equipment purchased will be safe and age appropriate for the senior resident population. Area of Impact: Health

Meals On Wheels Of Northwest Indiana Inc......\$5,000 The Food Subsidy Account will underwrite senior meals for Hobart residents who can't afford them. Area of Impact: Health

the future of our Center. Area of Impact: Human Services





Maria Reiner Center







## Endowment and Donor Advised Fund Distributions

| Arts & Culture Grants Chicago Symphony Orchestra The Morrow Family Fund\$3500.00 |
|--|
| Chorus Angelorum Inc Chorus Angelorum Endowment Fund\$750.00                     |
| Northwest Indiana Symphony Society Inc  Nancy K. Johnson Advised Fund            |
| South Shore Arts Inc The Morrow Family Fund                                      |
| for the NWI Symphony   |

| Southlake Children's Choir |           |
|----------------------------|-----------|
| Southlake Children's Choir | \$895.00  |
|                            |           |
| Towle Community Theatre    |           |
| The Morrow Family Fund     | \$5000.00 |



### **Education Grants**

| Andrean High School |
|---------------------|
|---------------------|

| A Bunch of Responsible Guys Fund | \$500 |
|----------------------------------|-------|
|                                  |       |

## Calumet College of St. Joseph

| M.E.T.A.S\$5   | 56173.79 |
|----------------|----------|
| 1VI.E. 1./1.J. | 30173.73 |

## Challenger Learning Center of Northwest Indiana

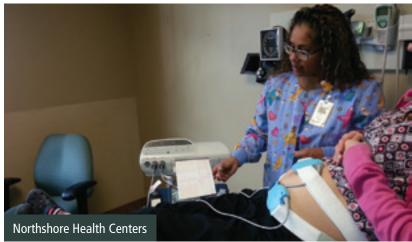
| for the NWI Symphony\$355.00                          | The Morrow Family Fund\$5,000.00                                  |
|---|---|
| South Shore Arts Symphony Advancement Fund\$75,000.00 | Nancy K. Johnson Advised Fund\$250.00                             |
| Nancy K. Johnson Advised Fund\$250.00                 | The Challenger Columbia Teacher fund\$19,500.00                   |
| Clare and Lucy Oesterle Fund\$750.00                  | Challenger/Griffith School Corporation Challenger Fund \$2,235.00 |

| Challenger/ Griffith School Corporation 3rd Grade Fund \$2,508.00   | Lake County Public Library   |
|---|--|
| Challenger/Highland School Corporation Endowment Fund\$3,208.00     | Jerome J. Gross and Dorothy J. Gross Fund\$4,551.00  |
| Challenger/Hobart School Corporation Fund\$1,767.00                 | Lake County Public Library Fund\$4,283.00  |
| Challenger/Lake Station School Corporation Challenger Fund \$460.00 |  |
| Challenger Learning Center of NWI Endowment Fund\$13,167.00         | Merrillville Education Foundation  |
| Challenger/Merrillville School Corporation\$8,819.00                | Frank Wright Memorial Fund\$2,500.00   |
|   | Merrillville Education Foundation Fund   |
| Challenger/St. Mary's-Griffith Fund\$445.00                         | Wellinville Education Foundation Fund  |
| Challenger Spark Your Imagination Fund\$493.00                      |  |
|   | Mount Mary College   |
| Communities In Schools of East Chicago Incorporated                 | Jerome J. Gross and Dorothy J. Gross Fund\$1,138.00  |
| M.E.T.A.S. \$7,805.00   |  |
|   | Purdue Foundation Calumet  |
| Dunes Learning Center   | Gloria Hubaceck Duckworth Fund\$6,072.00   |
| Indiana Dunes Environmental Learning\$3,075.00                      |  |
|   | The Dictionary Project   |
| Hammond Education Foundation Inc.                                   | Merrillville Breakfast Kiwanis Club Educational  |
| Milton & Ruby McClendon Memorial Education Fund\$610.77             | Attainment Fund\$1,056.00  |
| Bi-Centennial Memorial Scholarship Fund                             | Attuillient Fund   |
| bi-Certteriniar Memoriar Scholarship Fund                           | Trinity Lutharan Cahaal  |
| Hamman d Bak Ba Elkaran   | Trinity Lutheran School  |
| Hammond Public Library  | Hobart Anonymous Donor Fund\$10,000.00   |
| Hammond Public Library Fund\$2,491.00                               |  |
| Ruth E. Cornwell Fund\$24,257.00                                    | Wirt/Emerson High School   |
|   | Miller Community Fund\$1,200.00  |
| International Institute of Northwest Indiana Inc                    |  |
| M.E.T.A.S\$4,087.50   |  |
|   |  |
| Indiana University Bloomington                                      |  |
| The Morrow Family Fund\$5,000.00                                    |  |
|   |  |
| Ivy Tech Foundation   |  |
| Chase Fund (Ivy Tech State College)\$1,835.00                       | The state of the s |
|   |  |
| Chase Fund 2(Ivy Tech State College)\$1,808.00                      |  |

**Dunes Learning Center** 

USX Foundation Fund (Ivy Tech).....\$2,712.00





## **Environment and Animal Welfare Grants**

|    |    | _   | _     |       |     |       |       | _    |    | _ |      |      | _ |  |
|----|----|-----|-------|-------|-----|-------|-------|------|----|---|------|------|---|--|
| Sa | ve | The | Dunes | Conse | erv | atior | ı Fur | ıd . |    |   | <br> | <br> |   |  |
| Sa | ve | the | Dunes | Conse | erv | ation | Fun   | d I  | nc |   |      |      |   |  |

.....\$709.00 Indiana Dunes Environmental Learning Center Tuition Asst. Fund... \$3,000.00

## Dyer Garden Club

Dyer Community Foundation Fund.....\$384.76

## Humane Society – Calumet Area Inc

Humane Society of the Calumet Area, Inc. Fund ......\$6,466.00

#### Indiana Dunes Environmental Learning Center

Indiana Dunes Environmental Learning Center Fund ......\$1,000.00 Dunes Learning Center Education Fund ......\$2,000.00

#### Lake County Parks Department

The Morrow Family Fund.....\$3,000.00

#### Shirley Heinze Land Trust

| Shirley Heinze Land Trust Fund | .\$1,528.00 |
|--------------------------------|-------------|
| Nancy K. Johnson Advised Fund  | \$350.00    |

### **Health Grants**

Asian American Medical Association

Dennis and Amy Han Donor Advised Fund ......\$1,000.00

#### Catholic Medical Mission Board

Jerome J. Gross and Dorothy J. Gross Fund ......\$2,276.00

#### Franciscan Communities-St. Anthony Campus

Franciscan Communities, Inc. – St. Anthony Campus Fund .... \$31,899.00

### **Mayo Clinic Foundation**

Jerome J. Gross and Dorothy J. Gross Fund ......\$4,551.00

#### Meals on Wheels of Northwest Indiana

Frank Wright Memorial Fund.....\$5,000.00 Verne P. Seehausen Donor Advised Fund......\$2,500.00

## National Multiple Sclerosis Society: Chicago Chapter

Frank Wright Memorial Fund.....\$2,500.00

#### Planned Parenthood of Indiana, Inc

Friends of Planned Parenthood Lake and Porter County...\$1,095.00

| St. Anthony Medical Center, Inc St. Anthony Medical Center Fund\$16,899.00   | Gwendolyn Sargent Fund for East Chicago Katherine House Boys & Girls Club\$5,312.00 Boys & Girls Clubs of N.W. Indiana Fund\$21,836.00 |
|--|--|
| Samaritan Counseling Center  | Seehausen/Boys & Girls Clubs of NWI Fund   |
| Good Samaritan Endowment Fund of Lake County\$1,094.00   | Campagna Academy Inc   |
| Temple Israel  | Campagna Academy Inc\$3,033.00   |
| Cohen Family Fund\$20,000.00   | cumpagna Academy me  |
| , .,   | Catholic Charities of the Diocese of Gary Inc  |
|  | The Morrow Family Fund\$10,000.00  |
| NA CONTRACTOR OF THE PROPERTY OF THE PARTY O | Dr. Arlene & Leo Cooper Fund for Catholic Charities \$256.00   |
| NA s on eels   | Catholic Charities Diocese of Gary, Inc\$1,937.00  |
|  | Mathias A. & Ruth A. Kerger Donor Advised Fund\$1,490.77   |
|  |  |
|  | Catholic Diocese of Gary   |
|  | Jerome J. Gross and Dorothy J. Gross Fund\$5,689.00  |
|  | Catholic Foundation for Northwest Indiana  |
|  | Catholic Foundation Diocese of Gary Scholarship Fund   |
| Taste of Care Fund   | for Andrean High School\$290.05  |
|  | Catholic Foundation for the Diocese of Gary  |
| Human Services Grants  | Anne Verbeke Scholarship Fund\$22.76   |
| Ancilla Systems  | Catholic Foundation Diocese of Gary Scholarship Fund   |
| Dr. Leo & Arlene Cooper Fund for Nazareth Home\$589.00   | Bishop Carl Mengeling School Endowment Fund\$1,309.24  |
| Olga C. and William H. Brinkman Fund - Nazareth Home\$117,841.00   | Catholic Foundation Diocese of Gary Scholarship Fund   |
|  | for Bishop Noll Institute\$277.13  |
| Angels of Hope, Inc.   | Catholic Foundation Catholic Charities, Diocese of Gary\$438.02  |
| Frank Wright Memorial Fund\$100.00   | Catholic Foundation Diocese of Gary  |
|  | Camp Lawrence Endowment\$30.77   |
| Boy Scouts of America – Calumet Council  | Catholic Foundation Diocese of Gary Seminarian Fund\$300.73  |

Catholic Foundation Diocese of Gary

**Catholic Foundation** 

Cathedral of Holy Angels Endowment.....\$41.90

Holy Name Society Scholarship Fund ......\$8.33

Calumet Council Boy Scouts of America Fund......\$1,090.00

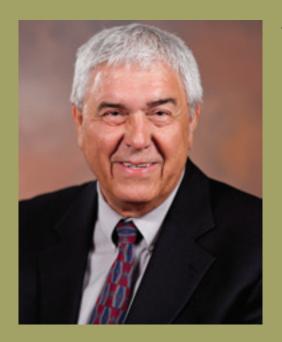
Ruth Cornwell/Boys & Girls Club - Hammond Club ...... \$10,127.00

Boys & Girls Clubs of Northwest Indiana

"The foundation grant helped the league improve its environment for our members/ artists who are part of a generational span of young kids through energetic seniors within the Hobart community and surrounding towns. Thanks to your foundation, we have provided many artists just this year with a place to create, learn, and feel safe."

## **Patricia Melanie Beauchamp**

Hobart Arts League



"Our foundation collaborated with Highland Parks & Recreation to receive a "Transform Lake County" grant for a project to enhance Highland's Blue Heron Rookery. This project will enhance and expand recreation opportunities available by providing amenities for the comfort and use of bicyclists, joggers and walkers, birdwatchers and photographers who visit the rookery."

Richard Underkofler Highland Community Foundation

"Many organizations talk about wanting to help and support grantees but few go the extra mile as you did—came to see our program, asked me specific and targeted questions and truly took an interest in what we are trying to do."

## **Lisa Woodruff Hedin** Executive Director

Carnegie Art Center

| Catholic Foundation for Northwest Indiana (continued) Catholic Foundation for the Diocese of Gary Holon Bukeszek Scout Educational Scholarchin Fund | Frankie W. McCullough Academy for Girls Cynthia R. & Mamon M. Powers, Jr. Advised Fund\$700.00          |
|---|---|
| Helen Pukoszek Scout Educational Scholarship Fund\$30.21<br>Catholic Foundation Joseph Hagenow/   | Girls on the Run of Northwest Indiana   |
| Justin Tylka Memorial Scholarship Endowment\$60.07 Catholic Foundation Bishop Grutka Scholarship Fund   | Merrillville Breakfast Kiwanis Club Educational Attainment Fund \$722.08                                |
| for North American College\$434.49  | Guy & Allen Funeral Home Bryce Scott Handley Memorial Fund\$363.25                                      |
| Catholic Foundation Operating Fund\$41.38 Catholic Foundation Diocese of Gary   |   |
| Priests Retirement Fund\$5.17   | Habitat for Humanity of Northwest Indiana, Inc.  NWI Habitat for Humanity Fund\$4,874.00                |
| Catholic Foundation Diocese of Gary St. Stanislaus Kostka Endowment   | Hammond Community Corporation   |
| Catholic Foundation St. Matthias Parish Religious   | Hammond Community Corporation, Inc. Endowment Fund \$63,427.00  |
| Education Fund\$41.09 Catholic Foundation Diocese of Gary   | Hammond Family YMCA   |
| St. Vincent de Paul Endowment Fund\$103.79  | Clare and Lucy Oesterle Fund\$750.00  |
| Catholic Foundation Diocese Of Gary St. Thomas More School Endowment  | Highland Community Foundation, Inc. Highland Community Foundation\$42,619.20                            |
| Andrean Scholarship Fund\$48.57   | Hobart Community Foundation   |
| Catholic Foundation Diocese of Gary St. Stanislaus Kostka Endowment   | Hobart Community Fund – sponsored by HIEDC\$10,000.00   |
|   | Honor Flight Chicago  |
| Catholic Relief Services  Jerome J. Gross and Dorothy J. Gross Fund\$2,276  | Taste of Care Fund\$8,000.00  |
|   | Hospice of the Calumet Area   |
| Center for Possibilities Center for Possibilities Fund  | Catherine Riley Boege Donor Advised Fund\$8,338.50 Hospice of the Calumet Area Endowment Fund\$3,701.00 |
| Center for 1 033ibilities 1 und   | Kidfunds Corporation  |
| Emmanuel Lutheran Church Mary Anne Hannah Fund\$873.00  | Frank Wright Memorial Fund\$1,000.00  |
| First United Lutheran Church Betty and Dick Sterk Donor Advised Fund  | Kraft Funeral Services and Crematory Bryce Scott Handley Memorial Fund                                  |
| Detty and Dick Sterk Donor Advised Fand   |   |

| Lake Area United Way  | Sojourner Truth House                                    |
|---|--|
| Lake Area United Way Fund\$15,057.00                                      | Nancy K. Johnson Advised Fund\$250.00                    |
|   | Womenade Fund  |
| Lake County Family and Domestic Service Bureau                            | Cohen Family Fund\$20,000.00                             |
| Officer Jerry Volom D.A.R.E. Fund\$1,200.00                               |  |
| Lalas Carreta Ballas Barraturant  | St. John the Baptist Catholic Church                     |
| Lake County Police Department Officer Jerry Volom D.A.R.E. Fund\$1,000.00 | St. John the Baptist Church fund                         |
| Officer Jerry Volom D.A.K.E. Fund\$1,000.00                               | St. John the Baptist Church Organ Fund\$600.00           |
| Maryknoll Sisters of St. Dominic, Inc.                                    | St. Joseph's Carmelite Home                              |
| Jerome J. Gross and Dorothy J. Gross Fund\$2,275.00                       | Catherine Riley Boege Donor Advised Fund\$18,338.50      |
|   |  |
| McHenry County United Way   | Take 9   |
| The Morrow Family Fund\$14,000.00   | The Morrow Family Fund\$7,500.00                         |
|   |  |
| NWI Volunteer Lawyers, Inc  | Tradewinds Services Inc                                  |
| Palmer C. Singleton Jr. Fund\$9,830.00                                    | John & Helen Sourlis Endowment Fund\$45,340.00           |
|   |  |
| Portage Township YMCA   | Treasured Friends, Inc.                                  |
| Nancy K. Johnson Advised Fund\$250.00                                     | Frank Wright Memorial Fund\$2,500.00                     |
| Ridge United Methodist Church   | Westminster Presbyterian Church                          |
| Betty Dye Memorial Fund\$8,000.00   | Westminster Presbyterian Church Fund\$1,160.00           |
| betty bye Memorial runu   | Westillister Flesbyterian Church Fullu                   |
| Rotary Foundation   | Whiting/Robertsdale Community Improvement Corp.          |
| Verne P. Seehausen Donor Advised Fund\$1,000.00                           | Whiting/Robertsdale Comm. Improvement Corp.              |
|   | Endowment Fund\$5,482.00                                 |
| Salvation Army  |  |
| Salvation Army of Lake County Fund\$12,748.00                             | YMCA of Hammond Area                                     |
|   | Endowment Fund of YMCA of the Hammond Area\$33,738.00    |
| Share Foundation  |  |
| Frank Wright Memorial Fund\$1,000.00                                      | YWCA of NWI  |
|   | Cynthia R. & Mamon M. Powers, Jr. Advised Fund\$1,000.00 |

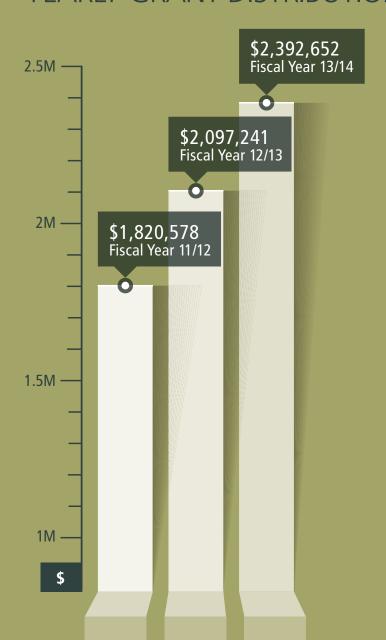


## Legacy's Grantmaking Impact Recognized State-Wide

The 2014 edition of Giving in Indiana, a publication of the Indiana Philanthropy Alliance, named Legacy Foundation in the "Top 10 Indiana Community Foundations by Total Giving." Legacy and the other nine listed accounted for over 72% of giving by Indiana community foundations. Legacy is proud to be included in this important group of funders. This achievement would not have been possible without the philanthropic partnership with our donors.

Since 1992, Legacy has distributed more than \$33,000,000 in scholarships and grants. This support is, indeed, improving social service, educational, environmental and health opportunities in Lake County as well as building a stronger Indiana.

## YEARLY GRANT DISTRIBUTIONS



## GRANT DOLLARS DISTRIBUTED

## **NET OPERATING EXPENSES**

Total expenses less grants expense, admin fees and other program costs





"I have attended South Shore Arts Toot & Doodle for several years but this was our first experience with Rhythm & Hues. The way this was organized, the children got to play more instruments AND play actual music. The 'rondo' at the end was impressive."

### **Terri Tratar**

Harding School, Hammond



# Legacy Foundation awarded more than \$218,000 in new scholarships in 2014

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. Recipient: Todd Peters

BI-CENTENNAIL MEMORIAL SCHOLARSHIP was established in 1998. It is a scholarship that is given on a rotating basis to a student from each of the four high schools in Hammond. Recipient: Krysta Syler

BP PRODUCTS NORTH AMERICA SCHOLARSHIP is awarded to a student who has been nominated for but not selected as a Lilly Endowment Community Scholar, and is planning to pursue a degree in math, science, or environmental studies at an accredited Indiana college or university. Recipients: Nickoulas Cooper-Garcia and Dylan Brock

BROADWAY SCHOLARSHIP was established to provide an award for students graduating from the Gary Community School Corporation and Andrean High School. Recipients: Latrice Young and Ezeguiel Godinez

"I am majoring in biology at IUPUI and the scholarship has helped me save money for other necessities."

Anais Picazzo
Recipient
Hammond Common Council Scholarshi

**DANIEL CHAVEZ MEMORIAL FUND** was established by Kathy Chavez and a group of dedicated and loyal friends to provide support to youth projects and scholarships in Lake County, IN. Recipient: Steven Armes, III

WEBSTER CORNWELL MEMORIAL SCHOLARSHIP was established by Ruth Cornwell in memory of her husband. This 4 year renewable scholarship is awarded each year to a student graduating from Hammond High School Recipient: Eric Schreiber

GOOD TEACHERS COUNT SCHOLARSHIP was established by nine women of Legacy Foundation's Board of Directors to help local women complete their education through monetary awards. This award is intended to financially aid a person who is currently enrolled at a college or university in northwest Indiana and is planning to be a teacher. The applicant must have completed at least 50% of the credit hours needed to earn a bachelor's or master's degree in a teaching program.

HAMMOND COMMON COUNCIL SCHOLARSHIP is awarded to high school seniors graduating from schools located in Hammond. Recipients: Marquis Tarver, Anais Picazzo, Jacob Villalpando, Lawrenzo Howell, Luis Ruiz, Kaela Cousins, Osiris Morales, Shenetha Shepherd, Eric Schreiber, Paige Rybicki, Shelby Rodriguez, Christian Torres, Celina Torres, Jamila Musa, and Laura Moreno

HANOVER CENTRAL HIGH SCHOOL SCHOLARSHIP This scholarship is available to graduating seniors from Hanover Central High School who will be attending a vocational, technical, two or four year college or university. The one year awards are designated for tuition, required fees, and/or book expenses. Recipients: Kaylin Fanta, Sara Shimala, Diane Besich, Renee Cavanaugh, Aaron Furman, Kellie Gladys, Rylie Singleton and Lindsey Trepton

KATHY LYYN HOOKS MEMORIAL SCHOLARSHIP honors the memory of a retired science teacher from the River Forest School Corporation. Recipient: Dylan Brock

#### 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. Recipients: Benton Wood, Michael Walstra, Ahdezjia Smith, Roger Jachna III, Charles L. Shields III, Hannah Schutter, Nicole Dumbsky, Peter Larson, Sara Quiroz, Brooke Fargo, Mark A. Toth, Megan Ray, Victoria Delaney, Eric Roldan, Kay Starzynski, Ashley Spurr, Jaclyn Walstra, Kammie Miller, Erin Shikany, and Phillip Shikany



"I am currently studying on exchange in the Netherlands and attending Erasmus University in Rotterdam. The Legends Scholarship has helped make my study abroad dreams come true by assisting me financially!"

Susan Strong
Recipient
Logando Scholarchie

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. Recipient: Paige Gilk

LAKE COUNTY ATHLETIC OFFICIALS ASSOCIATION SCHOLARSHIP is awarded to children of members of the Lake County Athletic Officials Association. Recipients: Sara Filipek, David Kepshire, Jordan Long, Bridget Brendza, Sierra LaFreniere, and Sarah Wieser

**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. Recipients: Mary Allison VanCleef

**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 to continue their education.

**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. Recipients: Alexandra Vasos, Latrice Young, Osiris Morales, Kaven Kolb, and Paige Gilk

**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. Recipient: Susan Strong

LILLY ENDOWMENT COMMUNITY SCHOLARSHIP This renewable and prestigious scholarship is awarded to graduating seniors of Lake County high schools. It is based upon academic achievement, leadership, service to others, financial need, a written narrative and an interview. The scholarship pays for full tuition at any accredited Indiana college or university plus up to \$900 per year for books and required equipment. Recipients: Jada Davis, West Side Leadership Academy; Joseph Brown, Lake Central High School; Rachel Bell, Morton High School; Kevin Lema, Whiting High School; Asha Walker, Calumet New Tech High School; Paige Mills, Merrillville 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. Recipients: Nathan Mason and Emmanuel Roldan



**2014 Lilly Scholars** (Left to right): Jada Davis, West Side Leadership Academy; Kevin Lema, Whiting High School; Asha Walker, Calumet New Tech High School; Paige Mills, Merrillville High School; Joseph Brown, Lake Central High School; Rachel Bell, Morton High School. Opposite page: Lilly Endowment Community Scholarship dinner, May 8, 2014





"Without this scholarship I would have had to have found a job on campus. Instead, I am able to concentrate on my studies. My grades are excellent."

## **Benjamin Allen Daniels**

Recipient
Joseph Trent Morrow/ Urban League
Scholarship

JOHN MANIOTES SCHOLARSHIP was awarded for the first time in 2005. This scholarship was established to benefit children or grandchildren of current employees of Lake County, Indiana at the Government Center in Crown Point or another site. Recipients: Jada Davis and Myranda Harris

**BARBARA MILLER MEEKER ART SCHOLARSHIP** was established by Barbara Meeker, a respected local artist, to encourage Munster or Highland High School seniors pursuing a degree in the visual arts.

BILL AND SUE MODRAK SCHOLARSHIP was established to benefit Modrak McDonald's current employees, or dependents and grandchildren of current employees. Recipients: Adam Tapper, Dionna Casillas, Joshua Engels and Kellie McCullough

WILLIAM J. MORAN INDIANA UNIVERSITY MAUER SCHOOL OF LAW MEMORIAL 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. Recipients: Timothy Brown and Morgyn Graber

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, Hammond, and East Chicago School Corporations. Recipients: Caylyn Weatherspoon and Benjamin Daniels

**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. Recipient: Elliot Bibat

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. Recipients: Morgan Courteau and Alek Seeley

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. Recipient: Candace Pick

**ROTARY CLUB OF GARY SCHOLARSHIP** awards students from Thea Bowman Leadership Academy with a one-time award to assist with the costs of tuition, fees and/or books.

**NORAH SALT SCHOLARSHIP** was established by Rayson and Norah Salt to benefit a student from Hebron High School seeking a degree in engineering.

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. Recipients: Jada Davis, Lawrenzo Howell, Jenna Giacomin, Nicholas Hanlon, Noah Sarkey, Nicklaus



John V. Primich
June 3, 1930–2014

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. Recipients: Austin Qualizza, Lauren Prokof, Kimberly Sherwin and Rachel Palmer

SCHRAGE FAMILY SCHOLARSHIP (continued) Ingoglia, Travis Tredway, Matthew Bliss, Kaylyn Anderson,

Mikaela Meyer, Paola Castaneda, Amy Bubala, Lindsey Trepton, Alexandra Magallon, Mikayla Small, Mariah Micallef, Rachel Megquier, Nadia Duke, Mattison Chayhitz and Maureen Reed

**THE DR. JOHN T. SCULLY MEDICAL SCHOLARSHIP** was established in honor of Dr. Scully, to assist students at the Indiana University School of Medicine at Indiana University Northwest. The recipient must be a resident of Lake or Porter County attending the IU School of Medicine-NW. Recipient: Nektarios Vasilottos

**SENGUPTA FAMILY SCHOLARSHIP** was established in memory of Ganapati Sengupta and is renewable. It is awarded to Lake Central High School's highest ranking graduating senior. **Recipient: Samantha Kowalski** 

**CARA SPICER SCHOLARSHIP PROGRAM** was established in memory of Legacy Foundation's Vice President, Program Officer, and Grants and Communication Officer from 2007-2011. It provides financial support for children of low income families in Northwest Indiana who want to participate in Fine Arts activities and do not have the monetary ability to do so.

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. Recipient: Ebone Tuggles **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. Recipients: Alyssa Wojcik and Kevin Yurasovich

**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. Recipient: Samantha Browne

"My scholarship has been a tremendous asset to my law school career. By receiving this scholarship, I was able to put more time and energy into pro bono projects. I am on the Executive Board of Indiana University's Protective



Order Project, which helps victims of abuse, stalking, and domestic violence receive protective orders."

## **Morgyn Graber**

Recipient

William J. Moran Indiana University Maurer School of Law Scholarship

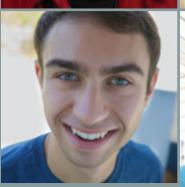














"I truly feel honored to have been awarded this scholarship. The Legacy Foundation scholarship made me want to succeed; I want to work hard to make others proud of me. I have put more time towards studying and learning this semester than I had put towards my senior year of high school! More than anything, it helps that I am interested in my major. Having an interest in what you are learning immensely helps retain the information and makes the entire experience enjoyable."

**Todd Peters**Recipient
Roger Begnoche Scholarship

Top row (left to right)
Aaron Furman
Caylyn Weatherspoon
Nickoulas Cooper Garcia
Paige Gilk
Dylan Brock

Middle row (left to right) Kevin Yurasovich Todd Peters

Bottom row (left to right) Eric Schreiber Lindsey Trepton Kaylin Fanta Kimberly Sherwin











## Establishing a Fund at Legacy

Legacy Foundation offers donors the option to establish either an endowment or non-permanent fund to support charitable organizations and causes.

Donors have a wide variety of choices when defining where to direct their charitable dollars. Funds can be set up to support annual gifts to one's alma mater, church or favorite not-for-profit agency, in or outside of Lake County, or provide scholarships to worthy students.

You can give now through a variety of charitable funds we offer, or you can give later through our options in planned giving.

Our staff will work with you in your decision making to create the impact you want with your personal giving.

## Ways to Give

Legacy Foundation offers a variety of gift possibilities for those who wish to create a lasting legacy. The following gift options are available at Legacy:

- Cash Gifts—including Memorials and Tributes
- Publicly Traded Securities
- Real Estate and Other Property
- Gift Annuities
- Bequests
- Charitable Remainder Trusts
- Life Insurance Policies
- Retirement Plan Assets
- Private Foundation Grants

To discuss your charitable goals and how to make them a reality contact our President/CEO at 219-736-1880

Currently Legacy has created partnerships with over 260 individuals and organizations who established funds to support their philanthropic interests and charitable programs bringing our total assets close to \$50,000,000. Of those 260 funds, 30 were established to provide scholarships which enable worthy Lake County students to have access to higher education.

## Funds Supporting Arts & Culture

Norma J. and John M. Cain, Jr. Fund
Cavalier Drum and Bugle Corps Fund
Chorus Angelorum Fund
Jack and Sara Dietrich Fund
Gardner Salon Show Prize Fund
Richard W. and Wanda L. Gardner Fund
Orval O. and Margaret Haag Salon Show Fund
Joann and Chuck Long Fund
Mabel McCants/NWI Symphony Fund
Alexandra Gardner Riddle Fund
Gary and Sandy Neale Fund
Patricia and Durward Schuetz Fund
South Shore Arts Fund
South Shore Arts Regional Award
For Young Artists Fund

South Shore Arts Symphony Advancement Fund Southlake Children's Choir Van Eekeren Family Scholarship Fund Donald R. & Violet Hayes Wray Memorial Endowment For The NWI Symphony

## **Funds Supporting Education**

A Bunch of Responsible Guys Fund
Klare E. and Marvin L. Anderson Scholarship
Arcelormittal Elementary School
Math & Science Fund
Lisa Austgen Challenger Fund
Bank Calumet Fund for Calumet College
Roger Begnoche Scholarship Fund
Bi-Centennial Memorial Scholarship
BP Products North America Scholarship
Broadway Scholarship Fund
Robert L. Burdan Memorial Scholarship
Calumet College of St. Joseph Fund
Challenger Learning Center of NWI Fund

Challenger/Griffith School Corporation Challenger/Griffith School Corporation—3rd Grade Challenger/Highland School Corporation Challenger/Hobart School Corporation Challenger/Lake Station School Corporation Challenger/Merrillville School Corporation Challenger/St. Mary's-Griffith Fund Challenger Spark Your Imagination Fund Chase Fund for Calumet College Chase Fund for Ivy Tech State College Joshua Benjamin Cohen Memorial Scholarship College Readiness Endowment Fund Ruth E. Cornwell Fund Webster Cornwell Scholarship Ease Fund Diane and Terry Eich Fund Forging Futures Fund Mary Francis G.E.D. Scholarship The Giving Back Pack Foundation Good Teachers Count Fund Hammond City Council Scholarship Fund Hammond Education Foundation Fund Hammond Public Library Fund Hanover Central High School Scholarship Fund **Hobart Educational Foundation** 

Kathy Lynn Hooks Memorial Scholarship Fund

IBEW Local Union #697 Memorial Scholarship Fund Herbert R. Kocher Memorial Scholarship Fund

Challenger/Columbia Teacher Fund



"From just a single fund, Legacy staff has helped South Shore Arts and its donors to create numerous individual funds that will support South Shore Arts, while honoring our donors, in perpetuity."

John Cain
South Shore Arts

Lake Central Education Foundation Fund Lake County Literacy Fund Lake County Public Library Fund Lowell Public Library Fund Lake County Athletic Officials Association Memorial Scholarship Lake County Bar Association Scholarship Fred & Louise Latshaw Scholarship Fund Legacy Scholarship Legends Scholarship Patrick Lindsey Memorial Scholarship M.E.T.A.S. Dr. John Maniotes Scholarship Fund Milton & Ruby McClendon Memorial Education Fund Arnulfo H. Medellin Memorial Barbara Miller Meeker Art Scholarship Merrillville Education Foundation Fund Bill and Sue Modrak Scholarship William J. Moran Indiana University Law School Scholarship Joseph T. Morrow Urban League Scholarship John & Myrna Newgent Stewardship Program Fund D. J. & Rose Nidetz Scholarship June Pangburn Memorial Scholarship Fund Nancy J. Pinnick Scholarship Cynthia R. and Mamon Powers, Jr. Scholarship John V. & George Primich Family Scholarship Rotary Club of Gary Fund Norah Salt Scholarship Schrage Family Scholarship Foundation Fund Dr. John T. Scully Medical Scholarship Sengupta Family Scholarship Cara M. Spicer Fund W. James Spicer Scholarship St. Anthony Purdue University Calumet Scholarship USX Foundation Fund For Ivy Tech Valparaiso University Fund

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

Dr. R.T. White Scholarship Foundation Whiting Refinery R.E.P.E.A. Scholarship Donna K. Yundt Memorial Scholarship

# Funds Supporting Environment & Animal Welfare

Association for the Wolf Lake Initiative Fund
Dunes Learning Center Education Fund
Environmental Fund for Lake County
Great Lakes Aquatic Habitat Fund
Great Lakes Environmental Collaborative Fund
Humane Society of The Calumet Area, Inc. Fund
Indiana Dunes Environmental Learning Center Fund
Indiana Dunes Environmental Learning Center
Tuition Asst. Fund
Save the Dunes Conservation Fund
Shifting Sands Documentary
Shirley Heinze Land Trust Fund

## Funds Supporting Health

Taltree Arboretum And Gardens Fund

Laini Fluellen Charities Inc.
Foundation for Molecular Medicine
Franciscan Communities, Inc—St. Anthony
Campus Fund
Friends of Planned Parenthood Lake
and Porter County
Jerome J. and Dorothy J. Gross Fund
Hospice of the Calumet Area Endowment Fund
Mabel McCants/Planned Parenthood Fund
Medical Specialists Foundation Fund
Pangere Fund for Retinal Research
St. Anthony Medical Center Fund
Visiting Nurse Endowment Fund
Frank Wright Memorial Fund

## Funds Supporting Human Services

2076 Tri-Centennial Memorial Fund Access to Recreation Fund Arc of Northwest Indiana Fund Austgen Family Foundation Fund "In Memory of Ronald E. Austgen" Glen E. Bacus Fund Marian Berry Scholarship Fund-YWCA Olga C. and William H. Brinkman Fund-Nazareth Home Bovs & Girls Clubs of N.W. Indiana Fund Calumet Council Boy Scouts of America Fund Campagna Academy, Inc. Catholic Charities Diocese of Gary, Inc. Center for Possibilities Fund Daniel Chavez Memorial Fund Cohen Family Fund Dr. Leo & Arlene Cooper Fund for Catholic Charities Dr. Leo & Arlene Cooper Fund for Nazareth Home Ruth Cornwell/Boys & Girls Club-Hammond Club Crisis Center Inc Endowment Fund Thomas Ray Crowel Fund Drifting Dunes Girl Scout Council Endowment Fund Betty Dye Memorial Fund **Dyer Community Foundation Fund Emerge South Shore Fund** Good Samaritan Fund of Lake County Habitat for Humanity of NWI Fund Hammond Community Corporation, Inc. Fund Hammond Youth Golf Academy **Bryce Scott Handley Memorial Fund Highland Community Foundation Fund Hobart Anonymous Donor Fund** Hobart Community Fund-Sponsored By HIEDC **Hobart Family YMCA Endowment Fund** Junior Achievement Fund

Kreitzburg Cemetery Fund

Lake Court House Fund Lake Area United Way Fund Lake County Youth Fund Meals On Wheels of NW Indiana, Inc. Fund Sunny Medved Memorial Fund Merrillville Parks And Recreation Fund Miller Community Fund Parents As Teachers Hammond, Lake County Salvation Army of Lake County Fund Gwendolyn Sargent Fund for East Chicago Katherine House Boys & Girls Club Seehausen/Boys & Girls Clubs Of NWI Fund Palmer C. Singleton Jr. Fund John & Helen Sourlis Fund St. John The Baptist Church Fund St. John The Baptist Church Organ Fund St. Joseph Medical Center For Nazareth Home Taste of Care Fund Westminster Presbyterian Church Fund Womenade Fund Whiting/Robertsdale Comm. Improvement Corp. Fund YMCA of the Hammond Area Youth in Philanthropy Fund

# Funds Supporting The Lake County Community Fund

YWCA of Gary Fund

American Savings FSB Fund
Catherine & Calvin Bellamy Fund
Catherine Riley Boege Community Fund
Chase Fund
The Centennial Fund
Ruth Cornwell Fund
The Webster Cornwell Fund
James L. And Prudence Dandurand Fund
Dean & Barbara White Fund
Robert & Barbara Gasser Fund

James H. & Mary Ann Greiner Fund HFS Bank Fund Jack S. & Frances S. Killen Fund Nancy & Allen Johnson Fund Francis Meyer Family Fund Leonard & Mildred Millies Fund The Morrow Family Fund Nicholas J. Pangere Memorial Fund William & Diane Payne Fund Cyril Sandala Fund Wilbert & Olga Seehausen Fund Louise & Bancroft Yarrington Fund

## **Donor-Advised**

Fredricka Cooper Davidson Advised Fund Dennis and Amy Han Donor Advised Fund Mary Anne Hannah Fund Nancy K. Johnson Advised Fund Mathias A. & Ruth A. Kerger Donor Advised Fund Knight Foundation Donor Advised Fund Marjorie A. Mills Fund Chris & Dede Morrow Fund Clare & Lucy Oesterle Fund Beth Radigan Memorial Fund Dana Rifai Fund Betty & Dick Sterk Donor Advised Fund Tom Sourlis & Sue Eleuterio Donor Advised Fund Verne P. Seehausen Donor Advised Fund Dean White Charities Fund Pamela Meyer Yttri Donor Advised Fund

## **Legacy Society**

Legacy Society honors those who have created a fund at or left a gift for legacy foundation through their estate plan. Please contact us if your name should be added to this list or if our staff can provide charitable planning assistance as you consider your estate plan.

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





Lake County's Community Foundation

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