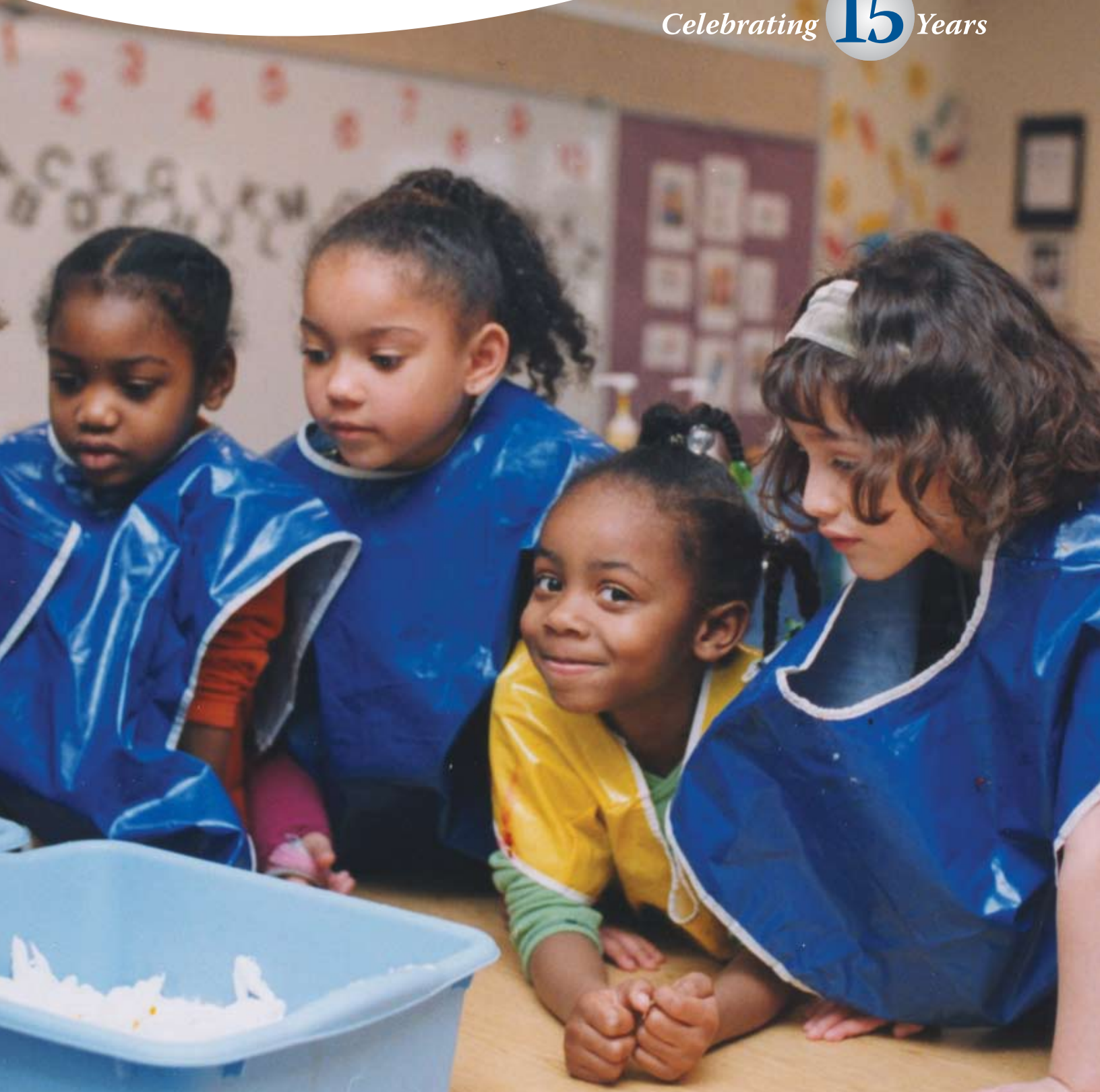




*Celebrating* **15** *Years*



the power of endowment



“When I look back on our first fifteen years, I don’t think about goals accomplished, grants made, or initiatives undertaken. I think about people, one by one.”

—Rose Meissner, President

Dear Friend,

When I first joined the Community Foundation of St. Joseph County fifteen years ago, I thought it was all about money: asking for it, investing it, and giving it away. It didn’t take me long to realize the Community Foundation is not about money, though. It’s about people, and their capacity for goodness, generosity, and vision.

And so while the Community Foundation does ask for money, invest it, and give it away, we do so from the understanding that money is a force, not a goal. It fuels the work of our community’s best charities. It encourages us to think up new and better ideas to move the community forward. It inspires hope.

In fact, the Community Foundation has never pursued an idea or initiative that we could afford to do with our own resources. We’ve relied on very special people to believe in what we are trying to do, and give us the money to make it possible.

So when I look back on our first fifteen years, I don’t think about goals accomplished, grants made, or initiatives undertaken. I think about people, one by one. I think about the talented people who work for all the organizations we are privileged to support with our grants; I think about the volunteers who donate their time and talent to the Community Foundation and so many other worthy causes; and I think about the donors who have given to endowed funds that will continue to benefit this community forever.

This document is intended as a tribute to those who helped build this Foundation, a challenge to use our growing experience and resources for greater good in the future, and—hopefully—an inspiration to give to one of our endowed funds, or create one of your own. You’ll be in excellent company.

Sincerely,

Rose Meissner, President  
Community Foundation of St. Joseph County

## The Power of Endowment

Stonehenge. Easter Island. The Great Pyramids. When we think of the thousands of years that these structures have existed, we're awestruck. We're inspired by more recently constructed monuments—such as those in Washington, D.C.— when we imagine their futures, stretching far beyond our own. And on a smaller scale, we reflect on permanence and its partner, mutability, when we celebrate wedding anniversaries, birthdays, and anniversaries of employment.

At the Community Foundation of St. Joseph County, we understand the power of permanence. We know that it's the key to ensuring that our community's future will be even brighter than its past.

We don't create pyramids or statues here at the Community Foundation, of course. We build a different kind of monument, a living legacy that reflects the intentions of those who constructed it. We build endowment.

Since we began in 1992, we've grown our endowment to more than \$110 million. With it, we serve the people of St. Joseph County through initiatives and grant-making activities in the areas of arts and culture, health and human services, community and economic development, youth and education, and parks and recreation.

Members of our community created the endowment—people such as Judd and Mary Lou Leighton, whose generosity allows us to waive administrative fees on all of our funds; the family of Justin Wozny, whose scholarship fund sends a student to college every year in his memory; and Herb and Myrtle Wilson, one of the Founding Families involved with the African American Community Fund. These people believe in a brighter future for St. Joseph County, and they trust the Community Foundation to help chart the course.

We take their trust very seriously. Through careful stewardship, we've consistently exceeded our goal for financial performance—to generate returns 5% above inflation—ensuring that the endowment's power will increase over the years.

Also, as our name implies, we know our community from top to bottom. We know which charitable organizations do the best work, and which have the potential—with a little extra nourishment—to grow into major forces for change. And we use our knowledge to put our resources to the best possible use, for the good of the entire community.

For the past fifteen years, the Community Foundation has been improving the lives of the people of St. Joseph County, and we'll continue to do so.

Permanently.

## assets

As of July 2007, the Foundation's combined assets and endowment are worth more than \$125 million, putting us among the top 100 community foundations in the country

## investment returns

We've consistently exceeded our investment return goal of inflation plus five percent over the past fifteen years, which means our funds are growing more powerful over time

## community benefit

Since the Community Foundation began dispersing funds, we've returned more than \$38 million in grants to the community

"What the Community Foundation has done in fifteen years is incredible."

—Jim Coppens, Executive Director  
South Bend Civic Theatre

# Fifteen Years of the Community Foundation:

1992 • 1993 • 1994 • 1995 • 1996 • 1997 • 1998 • 1999 • 2000

GEORGE M. HALEY   THOMAS R. CASSADY SR.   CHARLES ROEMER   ERNESTINE M. RACLIN   DONALD G. CRESSY



Dr. Haley, a urologist, retired from South Bend's Urology Associates in 1999



Mr. Cassidy is one of the cofounders of insurance agency Cassidy, Neeser, & Brasseur



Mr. Roemer is an attorney whose firm, Roemer & Mintz, merged with Barnes & Thornburg in 2002



Mrs. Raclin is chairman emeritus of 1st Source Corporation



Mr. Cressy is the president of Cressy and Everett Real Estate Company

2001 • 2002 • 2003 • 2004 • 2005 • 2006 • 2007 • 2008...

PATRICK L. O'MALLEY   RICHARD B. URDA JR.   JAMES KEENAN   EDWINA KINTNER   MYRTLE WILSON



Mr. O'Malley is the retired chairman, president, and founder of Canteen Corporation



Mr. Urda is an attorney who heads Urda Professional Corporation



Mr. Keenan is an investment advisor and president of the Judd Leighton Foundation



Mrs. Kintner is the former Controller of the City of Mishawaka



Mrs. Wilson is Assistant Superintendent for the South Bend Community Schools

William & Kathryn Shields Fund for the Education of Medical Professionals established

James W. Frick, Ph.D., hired as president to lead first endowment campaign; Rose Meissner hired as assistant executive director to oversee grants and administration

\$1.7 million Lilly Endowment challenge grant received

Major matching gifts from Notre Dame and Memorial help achieve Lilly Challenge in record time

Meissner named president following Frick retirement

Laidig, Inc. Scholarship Fund established

Donald and Patricia Cressy Foundation established, the Community Foundation's first supporting organization

Leighton Endowment for the Advancement of Philanthropy established

Jon and Sonja Laidig Foundation established

Lilly Endowment Community Scholarship program begins: Since then, more than 50 students have received four-year full-tuition scholarships

Foundation grant helps fund new Center for the Homeless

African American Community Fund launched

Foundation grant supports major renovation of YMCA

Community Foundation becomes the Indiana Arts Commission's Region 2 partner

LOGAN wins the Foundation's first Leighton Award for Nonprofit Excellence

Foundation launches \$5 million Early Childhood Education Initiative, training more than 200 teachers and dramatically improving education quality

Foundation grants help fund new YWCA facility and new LOGAN facility

\$110,000,000

\$125,000,000

Foundation launches \$6 million ArtsEverywhere Initiative: the ArtsEverywhere.com events calendar, the ArtsEverywhere magazine, and an arts grant-making component

Community Foundation grant helps fund major renovation of South Bend Civic Theatre's new home, the Scottish Rite building

Foundation Grant supports creation of new local Boy Scouts of America facility

South Bend Civic Theatre receives the Foundation's first-ever ArtsEverywhere Major Venture Grant, funding a new position: Director of Theatre for Young Audiences

Foundation launches major new Senior Home Modification Initiative, allowing low-income and disabled seniors to remain in their own homes longer

\$64,000,000

\$58,000,000

\$48,000,000

\$31,000,000

\$11,000,000

\$6,000,000

\$2,500,000

**COMMUNITY FOUNDATION**  
OF ST. JOSEPH COUNTY

Celebrating **15** Years

Through our work, we build nonprofit capacity, promote philanthropy, and strengthen community. We're local leaders, providing resources that enable positive change.

Since we began in 1992, we've distributed over \$38 million in grants, and we've grown to become the second-largest community foundation in Indiana.

GROWTH IN FOUNDATION

ASSETS AND ENDOWMENT

# arts and culture

## South Bend Symphony Orchestra

has more dollars invested in endowed funds with the Community Foundation than any other organization. Donors contribute to such endowed funds to provide permanent annual support to their favorite nonprofit agencies. Each year, the Foundation gives the Symphony a portion of the endowment earnings and reinvests the rest so their fund grows. The Foundation also partners regularly with the Symphony to support its educational outreach efforts and its guest artist programs.



Baritone and South Bend native Nathan Gunn, who performed with the South Bend Symphony through an ArtsEverywhere grant

## South Bend Regional Museum of Art

has launched a number of new programs that expand the museum's local outreach with Community Foundation support, including the Midwestern Visions of Impressionism exhibit, the Live the Arts! Festival of Banners, and the Lesson Planners partnership with local schools.



SBRMA Executive Director Susan Visser

● Since its inception, the Community Foundation has awarded more than \$6,100,000 in grants that support arts and culture.

## South Bend Civic Theatre

has grown exponentially over the past decade, becoming one of the forty largest community theaters in the United States. Winner of the Community Foundation's 2007 Leighton Award for Nonprofit Excellence, SBCT is building its endowment and expanding its programs with the help of the Foundation's first-ever Major Venture Grant. This grant has allowed SBCT to hire a Director of Theatre for Young Audiences and expand its programming for children.



More than 100 SBCT actors, staff, and volunteers fill the seats in SBCT's new Wilson Auditorium



## Helping the Arts to Flourish: ArtsEverywhere

A Web site that lists hundreds of local theater, dance, music, and visual art events and receives more than 70,000 hits a month. A full-color quarterly magazine that showcases local arts and artists, distributed through the *South Bend Tribune*. More than \$340,000 returned to the community through grants that strengthen arts and culture.

Those are the three main pillars of ArtsEverywhere, a \$6 million initiative that the Community Foundation launched in the fall of 2004 to help support local arts organizations and the artists they present. Our community is brimming with talent—talent that drives economic growth, draws people together in festive spaces, and expresses the identity of our community through its creativity, diversity, and cultural variety. At the Community Foundation, we believe that when we invest in the talent of our local arts organizations, we invest in our future.

● Each month, [ArtsEverywhere.com](http://ArtsEverywhere.com) receives more than 70,000 hits and the *ArtsEverywhere* magazine reaches 50,000 people every quarter.

## SPOTLIGHT: The Leighton Award for Nonprofit Excellence

Judd Leighton believed in encouraging local nonprofits to “dream big” — to reach beyond the basics and find fresh, innovative ways to grow and improve. In this spirit, the Community Foundation's annual Leighton Award for Nonprofit Excellence recognizes and rewards outstanding achievement in this sector with a \$100,000 challenge grant. The winner of the Leighton Award must raise \$100,000 in matching dollars, and the resulting \$200,000 creates or adds to a Community Foundation endowment fund for that organization.

The Leighton Award winners represent the best of the best in the leadership, management, and programming of our community's nonprofit organizations.

### Past Winners of the Leighton Award

- 2000 LOGAN
- 2001 Center for the Homeless
- 2002 South Bend Heritage Foundation
- 2003 REAL Services
- 2004 St. Joseph Health Center at Chapin Street
- 2005 Goodwill Industries of Michiana
- 2006 Center for Hospice and Palliative Care, Inc.
- 2007 South Bend Civic Theatre
- 2008 YWCA of St. Joseph County



Rose Meissner with YWCA Executive Director Linda Baechle, YWCA Chair Judy Jankowski, and Leighton Award Chair Rod Ganey

# health and human services



Community Foundation funds helped support the construction of the new LOGAN facility on East Jefferson Blvd., built in 2004; above, former LOGAN board president Joe Doyle, right, gets help from Irv Derda and Molly Schmitt at the groundbreaking ceremony

## A Facility of One's Own

Virginia Woolf famously said that a little money and a room of her own were the essentials that a woman needed to be a successful writer. At the Community Foundation, we understand that nonprofit organizations need their own dedicated, up-to-date spaces to be able to successfully serve their clients.

Because of that, we've contributed over \$1.5 million to the capital campaigns of our best local nonprofits over the past fifteen years. Community Foundation dollars helped fund the new YWCA and the new LOGAN facility, and supported a major renovation of the YMCA. The Center for the Homeless, South Bend Heritage Foundation, the Food Bank of Northern Indiana, and the Boys Scouts are among the many fine organizations that have received Foundation support for facility improvements.

When nonprofit organizations get the opportunity to build dedicated "rooms of their own," they're able to expand their operations and reach out to new clients. It's been our pleasure to watch these outstanding nonprofit agencies grow to fill their new spaces while simultaneously filling the lives of their clients with new services and additional support.



Lester Fox

## SPOTLIGHT: Charitable Gift Annuities

In recent years, charitable gift annuities have become a popular way for individuals to arrange for a lifelong annual income that will also benefit their favorite charities. Les Fox, former president and CEO of REAL Services, is a firm believer in the value of gift annuities.

Les, who has been recognized at the local, state, and federal level for his many contributions and services to the community, has established two charitable gift annuities with the Community Foundation to benefit his favorite charity: REAL Services.

Les receives a fixed quarterly income for life from the assets that he gifted to the Community Foundation. After his death, any assets remaining in his gift annuities will be transferred to the Lester and Viola Fox Fund. Every subsequent year, REAL Services—the organization that Les founded in 1966 to serve the elderly, disabled and low-income families in a five-county area—will receive grants generated by the earnings from that fund.

As Les Fox knows, charitable gift annuities are a wonderful way to continue to support the causes that you care about long into the future.

Currently, the Community Foundation includes approximately 40 charitable gift annuity funds, and the number continues to grow.

## Reinterpreting the Wishes of Donors: The Senior Housing Initiative and the Milton Fund

Funds at the Community Foundation will exist forever—that's the power of permanent endowment. But we won't, of course. There's beauty as well as poignancy in this truth, because our great-grandchildren can learn to know us through the charitable work that we do during our lifetimes. But what happens when times change—as they inevitably do—and the parameters that shaped our past philanthropy are no longer meaningful?

At the Community Foundation, we understand the delicate process of reinterpreting donor intentions.

One of the best examples of this is the Milton Fund. When they died in the early 1940s, long-time local residents Robert and Clara Milton bequeathed their estate to create a retirement home for elderly women. However, the home ceased to be financially viable in the '80s, and was sold. The proceeds were used to establish the Robert P. and Clara I. Milton Fund at the Community Foundation, and today the Miltons' generous gift continues to meet senior housing needs in ways that promote dignity, independence, and quality of life. Most recently, the fund has supported REAL Services' home modification program for low-income seniors, which allows seniors to remain in their own homes for as long as possible.

We think the Miltons would be proud.



Robert P. Milton

## community and economic development



Richmond and Virginia Calvin, co-chairs of the African American Community Fund Campaign

### The African American Community Fund

For African Americans, philanthropy is no new concept. It's a long-standing tradition with roots that reach back to the very beginning of the black experience in America. African American giving—time, talent, and money—has established churches, built schools, instituted social programs, and launched leaders.

In recognition of this, the Community Foundation established the African American Community Fund initiative in 1999. Thanks to a million-dollar campaign lead by Richmond and Virginia Calvin, this initiative consists of one primary fund and more than 20 individual funds established by African

American families and organizations. The AACF's assets will soon exceed \$1.5 million, and the fund has made more than \$300,000 in grants to date to improve the lives of local African Americans.

The AACF makes an important statement about the commitment of African Americans here in St. Joseph County. It's one of a very few endowed funds in the U.S. where the dollars that seeded the fund came directly from members of the African American community. These Founding Families remain closely involved with the fund, working with the Foundation to make decisions about reinvesting in the African American community. They're passionately committed to building awareness of the fund, raising the AACF's profile while they raise contributions.

The African American Community Fund initiative is working on a new million-dollar campaign. As the fund grows, so does its potential to help spur and support programs that matter to the African American community now and long into the future.

All of the contributors to the African American Community Fund have one thing in common: They recognize the interrelated nature of any community. When we strengthen a part, we strengthen the whole.

"This to me is one of the proudest moments of my life—seeing the African American community coming together in this way."

—Richmond Calvin, Past Chair  
African American Community Fund

"People don't grow up in cities—They grow up in neighborhoods. On blocks. In houses. If we really want to help people, we need to invest in their neighborhoods."

—Rose Meissner, President



A local Habitat for Humanity volunteer works on a new housing project

### Investing in Neighborhoods

Neighborhoods are the building blocks of every healthy community. They're surprisingly fragile, though. Neighborhoods are susceptible to multiple social and economic challenges, and problems such as declining real estate values, higher crime, rampant poverty, and overall disinvestment can drive a fragile neighborhood into a tailspin.

Luckily, St. Joseph County has several fine nonprofit organizations who have the visions, skills, and dedication to turn such neighborhoods around and to prevent other neighborhoods from slipping into this devastating cycle. These organizations know that neighborhoods aren't about houses—they're about the people who live in them.

Agencies such as South Bend Heritage Foundation, the Near Northeast Neighborhood Revitalization Organization, and the Near Northwest Neighborhood Association build and rehab housing, help low-income

people achieve the American dream of home ownership, engage in advocacy and community organizing to give residents a voice, and develop real estate to attract new businesses and jobs to urban neighborhoods.

Over the years, the Community Foundation has worked with organizations such as these to stabilize local neighborhoods. Our grants and zero-interest loans have assisted South Bend Heritage Foundation as it developed the Colfax Campus and Robertson's Apartments, supported the Near Northwest Neighborhood Association as it bought dilapidated houses to rehab and sell to first-time home owners, and encouraged volunteer-driven organizations such as Habitat and WomenBuild as they provide housing to families who couldn't afford it otherwise.

For St. Joseph County to thrive, *all* of our neighborhoods need to be strong. That's why the Community Foundation believes in investing in neighborhoods.

## youth and education



Ida Hawkins' Head Start students work on a project together



Early education experiences shape children's lifelong interest in school

### Lifelong Results: The Early Years Count in Education

In 2001, the Community Foundation received \$5 million from Lilly Endowment to improve education in St. Joseph County. Most kids who start out behind stay behind. High-quality early childhood education can make a big difference in preparing children to succeed in school—academically, socially, and emotionally. Our goal is to give disadvantaged children a fair start, and that's exactly what we've been doing.

Since 2001, we've used the research-based, nationally recognized High/Scope program to train more than 200 teachers, assistants, and administrators in effective classroom techniques. We've evaluated the success of the program through the Early Childhood Assessment Project (ECAP), which uses objective rating scales to judge how well these new tools are being incorporated. And we've helped teachers get the mentoring and support they need through ECAP mini-grants, intensive seminars with local and national experts, and ongoing High/Scope classes and workshops.

As a result, we've dramatically improved the quality of early childhood education for thousands of young children in Head Start classrooms and other centers throughout the county. Now more children start school ready and eager to continue learning. And *that's* good for the entire community.

"I don't know of anything more important to a community than the education of its individuals."

—Myrtle Wilson, Board Chair-Elect

### Through a Teacher's Eyes

*After incorporating the Community Foundation-sponsored High/Scope Curriculum and HeadsUp Reading, preschool teacher Laura Allison reflects on changes in her students and herself.*

I am a preschool teacher at Christian Tabernacle. I have been teaching for 13 years. My class of approximately 18 preschoolers was in a very small room that didn't allow for much more than direct learning. They sat, I taught. We focused on what the children didn't know or couldn't do. It was our mission to bring them up to appropriate standards. We didn't have time to waste on play unless their work was done or it was recess. They had to be ready for kindergarten.

Paper was limited for the daily dittos. Art supplies were only used for those cookie cutter art projects. There was a time-out chair and we used it. Our kids lined up in straight lines going and coming to class and they were quiet. In fact, the teachers did most of the talking. Parents wanted to see results and they got them.

Then our center heard of a way to get free stuff and all I had to do was let someone observe my classroom. I said, "Sure." ...This would be the first step toward many wonderful transformations...

...Changes: There is NO time-out chair in my room. My room has defined, equipped areas that can expand out into our gym and even outside. ...I team-teach with my associate, based on children's interests. We share our new skill ideas with others. I take anecdotal notes to score in each child's COR (Child Observation Record). My children keep science journals, logging data they collected while tracking plant growth. They wrote books and did their own illustrations using some reference books. They wrote, directed, filmed, and starred in a video. Writing materials are everywhere. My kids make a daily plan and follow it. They teach each other on a daily basis. For example, if Billy needs pink paint, Suzy shows him how to make it. They phonetically sound out 2- and 3-letter words. They love books, all kinds. We use real items in our play. Instead of quiet lines, we now sing and use creative motion to come and go. Our vocabulary grows daily. We use words like "diversity" and comprehend the meaning. Parents have become my partners in education and my biggest resource.

Bottom line: My children are ready for kindergarten. They have a broad foundation on which to build the learning and life skills that will serve them and our community for a lifetime.



Jon and Sonja Laidig at a recent Christmas party

### Jon and Sonja Laidig

Growing up on a Mishawaka farm, Jon Laidig combined the experience of working the land with an inventor's spirit. He *knew* there had to be a way to improve how grain was stored, and he was determined to find it—so he designed and built a bottom unloader for silos. Despite early trials and errors, he persevered, and his hard work eventually progressed into patented designs. Over the years, he and his wife Sonja built Laidig, Inc. into a thriving business that sells its systems all over the world.

Today, Jon and Sonja feel a strong obligation to give back to our community. They've always believed firmly in the value of education, and they've helped send scores of local students to college. But it troubled them to realize that college scholarships can't reach those students who drop out along the way.

As a result, they've broadened their charitable giving to better reach young children, creating the Jon and Sonja Laidig Fund for Early Childhood Excellence. This fund provides permanent annual support for the improvement of early childhood classrooms. Through it, the Laidigs are helping to ensure that our community's youngest children start school ready to succeed.

# scholarships

The Community Foundation has more than 40 scholarship funds which award over \$350,000 to local students each year. The scholarships were established for a variety of reasons—to assist low-income students, encourage children of employees to pursue their dreams, or train medical professionals, teachers, and engineers. On a more somber note, many were established in memory of lost loved ones, turning grief into tribute and helping students in the process.



Katie McCloskey

## Katie McCloskey Memorial Scholarship Fund

The Katie McCloskey Memorial Scholarship Fund brings home the national tragedy of the 2001 terrorist attacks on New York City.

Katie McCloskey was born and raised in South Bend, where she attended St. Anthony's Grade School. A 1994 Adams High School graduate, she played on the varsity basketball and tennis teams, and, as a senior, was voted by her classmates as having the "best smile."

On September 11, 2001, Katie was working at her desk on the 97th floor of the World Trade Center's Tower 1. She and many coworkers became victims of the attack when the first plane hit. In her memory, Katie's friends and family created a \$2,500 renewable annual scholarship to benefit a graduating Adams High School senior.

"The fund has been such a wonderfully rewarding way for our family to honor her memory," says Katie's father, Dick McCloskey. "There are now two college graduates who benefitted from the scholarship, as well as four college students receiving help currently."




Bill and Katie Shields

## Shields Fund for the Education of Medical Professionals

Although Bill Shields has only a few years of formal education, he's got business smarts to burn. An entrepreneur who came of age during the Great Depression and WWII, Bill has developed several highly successful companies and continued to remain active in new business ventures well into his 80s.

In 1993, Bill and his wife Katie established the William S. and Kathryn L. Shields Fund for the Education of Medical Professionals. The couple challenged Memorial Hospital and St. Joseph Regional Medical Center to match their contributions, and built their fund into a significant resource for the community. Since then, the Shields Fund has awarded over \$1,000,000 in grants to support healthcare education.

"Bill's greatest gift is that he never clings to the past, no matter how fast things change," says Rose Meissner. "He wants the scholarship funds he and Katie have created to equip medical professionals with the skills they'll need in the future, not just what's needed today."

 The Community Foundation has distributed more than \$6 million in scholarships since its inception.

# foundation funds

## Key Initiative Funds

*The earnings from these funds give the Community Foundation much-needed flexibility to support worthy initiatives and programs that address current community needs as they change over time.*

- African American Community Fund
- ArtsEverywhere Fund
- Early Childhood Education Fund
- Community Endowment Fund
- Healthy Community Fund
- Senior Issues Fund

## Agency Endowments

*The earnings from these funds support the mission and programs of specific charitable organizations.*

- Bethel College Fund
- Boys & Girls Club/Family & Children's Center CDS Fund
- Boy Scouts of America: LaSalle Council Fund
- Harry and Jeanette Weinberg Endowment Fund for the Center for the Homeless
- Sister Maura Brannick Health Center Fund
- Nancy and Don Crawford Fund for the Fischhoff in Mishawaka Schools
- Ed Dargis Memorial Fund for Life Treatment Centers
- Family & Children's Center Foundation Fund
- Fischhoff Chamber Music Association Fund
- Food Bank of Northern Indiana Fund
- Goodwill Industries of Michiana Fund
- Hannah Lindahl Children's Museum Fund
- Hope Rescue Mission Fund
- Center for Hospice and Palliative Care Fund
- Hollis E. Hughes, Jr. Legacy Fund for United Way
- Fund For IUSB
- Junior League of South Bend Fund
- Leadership South Bend/Mishawaka Fund
- Youth Leadership South Bend/Mishawaka Fund
- Literacy Council of St. Joseph County Fund
- LOGAN Fund
- Kelsey Marie Meekhof Memorial Fund for Reins of Life
- Mental Health Association of St. Joseph County Fund
- School City of Mishawaka Education Foundation Fund
- Mishawaka Lion's Club Fund for the Mishawaka Education Foundation
- The Montessori Academy at Edison Lakes Fund
- Penn-Harris-Madison Educational Foundation Fund
- Potawatomi Zoological Society Fund
- Public Education Foundation Fund



Businessman and philanthropist Judd Leighton

## The Leighton Endowment

"Judd approached philanthropy very much as a business," says Jim Keenan, president of the Leighton-Oare Foundation and former chair of the Community Foundation. "He looked at it in the same way that he would look at a blue chip stock."

Because of his business acumen, Judd Leighton knew that the best way to grow the Community Foundation's assets quickly was to establish a fund that would waive the administrative fees that foundations normally assess on donations. That's why he created the Leighton Endowment for the Advancement of Philanthropy.

Judd's combined business savvy and philanthropic commitment means that every dollar contributed to Foundation endowed funds goes to support the causes chosen by donors—not the costs associated with fund administration. And the funds themselves grow more quickly because there's more money in them from the start.

Thanks to Judd Leighton's generosity and foresight in creating this fund, the Community Foundation has been able to maximize the power of endowment.



Agencies such as the South Bend Symphony rely on endowment to provide stable support

## Agency Endowments

For many nonprofits, the pressure of raising money to cover basic, day-to-day operating expenses prevents them from focusing on the big picture—and can trap them in a constant cycle of fundraising.

That’s where endowment can make a real difference. Endowment earnings provide annual income that a charity can rely on.

In the arts, endowment is critical because ticket sales alone seldom keep organizations going. “Endowments provide symphony orchestras with funds to build for the future,” explains Jane Hunter, Executive Director of the South Bend Symphony Orchestra, “and sustain the ebb and flow of the local economy.”

Human service organizations benefit from endowment, too. Take the Sister Maura Brannick Health Center on Chapin Street. If the Center relied solely on the small fee it charges patients, it would have to close its doors. Endowment provides one source of additional revenue to help the Center meet the needs of the uninsured, regardless of their ability to pay.

When you contribute to an agency’s endowed fund, the impact of your gift will last forever.

Ray Bird Ministries Fund  
 REAL Services Fund  
 Rebuilding Together Fund  
 Reins of Life Fund  
 South Bend Civic Theatre Fund  
 South Bend Heritage Foundation Fund  
 South Bend Regional Museum of Art Fund  
 Scholarship Foundation of St. Joseph County Fund  
 Southold Dance Theater Fund  
 St. Joseph County Public Library Fund  
 Saint Joseph’s High School Fund  
 St. Margaret’s House Fund  
 St. Mary’s College Fund  
 St. Paul Retirement Community Fund  
 South Bend Symphony Orchestra Association Fund  
 South Bend Symphony Artistic Leadership Fund  
 South Bend Symphony Musicianship Enhancement Fund  
 Trinity Schools Fund  
 United Way of St. Joseph County Fund  
 Women’s Care Center Foundation Fund  
 The WNIT Public Television Fund  
 Women’s Care Center Fund  
 YMCA Fund  
 YMCA Camp Eberhart Fund  
 YMCA Charles Martin Fund  
 Youth Service Bureau of St. Joseph County Fund  
 YWCA of St. Joseph County Fund

## Named Charitable Funds

*A separate, named endowment can be established for a minimum commitment of \$10,000. Some of these funds are designated to benefit specific charities or causes. Others involve the donors as advisors who recommend which charities or causes they wish to benefit from the earnings.*

The 333 Fund  
 1st Source Center For The Homeless Fund  
 1st Source Northern Indiana Historical Society Fund  
 1st Source St. Joseph Community Hospital Fund  
 1st Source St. Mary’s College Fund  
 1st Source IUSB Fund  
 1st Source Fund for the Studebaker National Museum  
 1st Source WNIT Fund  
 Abernethy Family Legacy Fund  
 Anonymous Angel Fund  
 ARC Fund  
 Bancroft Trust Fund  
 Hartie and Louise Blake Family Fund  
 Joseph and JoAnn Blazek Family Fund  
 Thomas Brademas Fund  
 The Braveheart Fund  
 David C. Brenay Fund  
 Phillip and Rosamond Byrd Family Fund

Barbara Shields Byrum Fund  
 Barbara Shields Byrum Fund for Fischhoff  
 Richmond and Virginia Calvin Family Fund  
 Gail P. and John H. Campbell, Jr. Fund  
 1st Source Carmichael Fund  
 Cassady Family Fund  
 Don and Peg Claeys Fund  
 Chas. W. Cole, Jr. Fund  
 Loretta Amamalin Watanabe Conway Fund  
 Nancy and Donald Crawford Fund for Shiojiri Garden  
 Cressy and Everett Charitable Fund  
 Crowe Chizek Community Foundation Fund  
 Culver Academies Fund  
 Michael and Constance Dillon Family Fund  
 Rosalind Ellis/Carl Ellison Fund  
 Elwell Family Fund  
 Stephen Fields Family Fund  
 F.I.R.E., Inc. Fund  
 Daniel B. Fitzpatrick Family Fund  
 Gertrude Fortin Education Fund  
 Frank Family Fund  
 Garcia Hispanic Fund  
 Gates Fund  
 The Roland W. Goheen Memorial Trust Fund  
 The Fern and Elmer Graber Kiwanis Fund for Children  
 George M. and Frances C. Haley Fund  
 Dorene Dwyer Hammes Fund for The Stanley Clark School  
 Edward W. and K. Joan Hardig Fund  
 Ralph M. and Lucille M. Hass Fund  
 Dr. Vincent and Angela Henderson Family Fund  
 Paul and Diane Herman Family Fund  
 Hillman Family Fund  
 Holaway Family Fund  
 Hollis E. and Lavera K. Hughes, Jr. Fund  
 John Adams High School Boys’ Soccer Fund  
 John Adams High School Girls’ Soccer Fund  
 Jarrett Family Fund  
 Bishop Daniel R. Jenky Cathedral Fund  
 Duke and Andy Jones Fund  
 The Jordanich Family Fund  
 Pat and Bob Kill Fund  
 Jonathan & Edwina Kintner Family Fund  
 Peter Kreig Memorial Fund for Camp Eberhart  
 James and Nancy Krzyzewski Fund  
 Jon and Sonja Laidig Fund for Early Childhood Excellence  
 Mary Morris Leighton Leadership Lodge at Camp Eberhart Fund  
 South Bend Links Fund for African American Arts & Culture  
 Evelyne Major Fund  
 John & Mary Martin Fund  
 David L. and Mary Ann Matthews Fund  
 Leo J. McKernan Fund  
 Paul and Sharon McLeod Fund  
 Collin and Rose Meissner Fund  
 Cleo J. Mellinger Memorial Fund



Chuck and Denise Roemer

## Building a Legacy

Chuck Roemer has been involved with the Community Foundation since the start. In 1992, when the Lilly Endowment made funds available to help form community foundations throughout Indiana, Chuck was one of the first to envision the Community Foundation of St. Joseph County.

Chuck and his wife Denise have continued to support the Foundation with their time and their resources generously over the years, and, through the Roemer Family Fund, they’re sharing their philanthropic values with their children.

When Chuck and Denise die, they plan to bequeath a significant portion of their assets to this donor advised fund within the Foundation. Every year, their five children will recommend grants from the fund’s earnings, focusing on their favorite charities.

Together, the Roemers are building a legacy of philanthropy. Through their endowed fund, their children—and, some day, their grandchildren and great-grandchildren—will continue doing good works long into the future.



Jim Frick, the Foundation's first president

## James W. Frick

One of the reasons for the Community Foundation's remarkable growth over the past fifteen years was our board's foresight in recruiting James W. Frick, Ph.D, to serve as the Foundation's president and lead its first endowment campaign.

The first layman ever named a vice president at the University of Notre Dame, Jim spent more than three decades orchestrating the university's extremely successful capital campaigns. His experience with relationship building was vital to the Foundation's early success.

"Jim was one of the deans of fundraising," says former board member Chris Murphy, who was instrumental in connecting Jim with the Foundation, "and he provided us with great starting leadership."

Although Jim left the Foundation in 1994, board members, donors, and staff remember his role in our nascent organization with tremendous gratitude.

- Martha M. & Robert H. Michaud Fund
- David A. and Alice L. Miller Fund
- Robert P. & Clara I. Milton Fund
- Edward V. and Margaret A. Minczeski Fund
- Mossberg & Company Fund
- Merle and Clarice Blue Fund for the Mishawaka-Penn Public Library
- Murphy Family Fund
- Marijke Niles Artist Fund for Southold Dance Theater
- NIPSCO Community Fund
- H. Theodore Noell Family Fund
- Bernard and Mary Norling Fund
- Okanlami Family Fund
- Bette & Patrick O'Malley Fund
- One Wish Fund
- James F. & Mary Anna Peacock Family Fund
- The Peterson Family Fund
- Pfeil Endowment
- Barb and John Phair Fund
- Ruth Carmean Putnam Memorial Scholarship Fund
- Randy and Tami Raciti Family Fund
- Samuel and Shirley Raitzin Fund
- Melvin Reed and Doris Bradley-Reed Family Fund
- Mary Alice, Regina & George A. Resnik Fund
- Rosemary & Fred Crowe Fund
- Roemer Family Fund
- Mary Cecilia Roemer Fund
- Rosenstock Family Fund
- Glenn Rousey Education-In-Action Program Fund for SJHS
- Vernon R. Ryan Family Fund
- Arnold and Vivian Sallie Family Fund
- Paul Saltzgaber Memorial Fund for Reading, Writing & the Arts
- South Bend Sports Fund
- Don and Karen Schefmeyer Fund
- Schoenle Family Fund
- Betty Schuell Memorial Fund
- Senkbeil Family Fund
- Arthur and Helen Shireman Fund
- Sollitt-Scholtes Family Fund
- David & Rosemary Spalding Family Fund
- Dean and Charlene Speicher Family Fund
- Dean and Janet Strycker Family Fund
- Georgianna Sweeney Fund
- Tannadoonah Campership Fund
- Teachers Credit Union Fund
- The Thoma/Auth Community Enrichment Fund
- A. Ried and Dorothy M. Thompson Fund
- Toal Family Fund
- Paul J. and Sarah Shrewder Tracy Fund
- Targeted Urban Renewal (TURF) Fund
- University of Notre Dame Fund
- Barbara K. Warner Fund
- E. Blair & Jane J. Warner Fund
- Perry and Ida Reynolds Watson Fund
- Karen and Derrick White Fund

- Herbert L. and Myrtle C. Wilson Family Fund
- Joseph and Barbara Wind Fund
- Woodward Miller Family Fund
- Tom and Margie Yarger Fund
- Youth Development Initiative Fund

## Scholarship Funds

- 1st Source Scholarship Fund for Indiana University
- Ancilla College Fund
- Thomas H. Barry Memorial Scholarship Fund
- Beaty Family Scholarship Fund
- Big C Lumber Fund
- Mr. & Mrs. Charles B. Burkhart Scholarship Fund
- Dr. Richmond E. Calvin Scholarship Fund
- Virginia B. Calvin Scholarship Fund
- Chas. W. Cole Scholarship Fund
- Coquillard Family Scholarship Fund
- Donald C. and Marion E. Currier Scholarship Fund
- Officer Paul R. Deguch Memorial Scholarship Fund
- James R. Deth Scholarship Fund
- Thomas A. Gerencher Memorial Fund
- Heather Anne Hammer Memorial Scholarship Fund
- Wallace and Roberta Hill Minority Scholarship Fund
- Fund For Holy Cross College
- IBEW Local 153 Scholarship Fund
- Ivy Tech State College Scholarship Fund
- Diane R. Killilea Memorial Scholarship Fund
- Laidig, Inc. Scholarship Fund
- South Bend Area Chapter of the Links Scholarship Fund
- Katie McCloskey Memorial Scholarship Fund
- John J. & Carol A. McGann Fund
- Michael J. McMahan Memorial Scholarship Fund
- W. Scott and Janette Burkhart Miller Scholarship Fund
- Anthony David Moore Memorial Scholarship Fund
- Robert O. Neeser/CN&B Memorial Scholarship Fund
- India Claire Patton Scholarship Fund
- Vincent Peterson IUSB Scholarship Fund
- Pfeil College Scholarship Fund
- Fred and Velma Shearer Fund
- Nicholas John Sherbun Scholarship Fund
- Kathryn L. and William S. Shields Fund
- Southold Historic Preservation Scholarship Fund
- Saint Joseph's High School Scholarship Fund
- Spalding & Zirille Memorial Scholarship Fund
- Justin Wozny Sportsmanship Award Scholarship Fund

## Supporting Organizations

*These are separate foundations legally affiliated with and administered by the Community Foundation.*

- The Cressy Foundation
- Jon and Sonja Laidig Foundation



ArtsEverywhere committee chair Dean Strycker with South Bend Symphony music director and conductor Tsung Yeh

## Donor Advised Funds

One way to stay closely involved with the process of philanthropy is through a donor advised fund with the Community Foundation. These funds reflect the interests of those who established them because the donors advise the Foundation annually on how to distribute the year's earnings.

One example of this type of fund is the Dean and Janet Strycker Family Fund. Dean Strycker, a retired anesthesiologist, is the chair of the Foundation's ArtsEverywhere committee. He and his wife Janet work with Foundation staff to distribute the earnings from their fund each year, actively participating in supporting their wide range of philanthropic interests.

One of the many benefits of a donor advised fund is that it can be built over time. The Karen and Derrick White Fund was established by Karen White to share her charitable values with her son Derrick. While Karen believes it's important to give back to the community, she needs to stay within a budget. Since 2000, she has made regular monthly contributions to the fund, ensuring a permanent, significant legacy.

With a donor advised fund, donors practice active philanthropy, led by their own interests and the Foundation's expert guidance.

## looking to the future

“In the next ten years, I hope...that we become a national model for conversation and change in the community.”

—Myrtle Wilson, Board Chair-Elect

“Problems are easier to solve with dollars. They don’t solve everything, but they help. As we go forward, I want to see us grow the endowment even more.”

—Jim Keenan, Past Board Chair

“[The Community Foundation’s] ArtsEverywhere [initiative] is really going to blossom and call great attention to this community.”

—Mayor Steve Luecke, City of South Bend

“Every generation will add to this organization; that’s the mental magic of endowment. It won’t simply survive—it will flourish. Then, when the right projects come along, the resources will be there to fund them.”

—Rose Meissner, President



You can learn more about the Community Foundation of St. Joseph County at [www.cfsjc.org](http://www.cfsjc.org). There, you’ll find secure ways to give, information about establishing your own endowed funds and gift annuities, grant application guidelines, staff contacts, and more stories about how the Foundation connects people who care with causes that matter.

## hopes for the next decade

