

## HIGHLIGHTS



The Community Foundation helps to create a major challenge grant opportunity for the South Bend Symphony Orchestra. *Full story on p. 5.*



As part of the Foundation's new Nursing Home Learning Cooperative, consultants Cathy Brady (left) and Barbara Frank (center) work with staff at South Bend's Milton Home to review and discuss operational procedures. *Full story on p. 7.*



Foundation donor George Resnik uses a gift of his IRA to maximize the power of his philanthropy. *Full story on p. 4.*



Kathy Schneider, executive director of St. Margaret's House, hugs Sheila Smith, guest services coordinator at St. Margaret's House, as she accepts the 2012 Leighton Award for Nonprofit Excellence.

## The Leighton Award: St. Margaret's House Recognized for Excellence

Memorial Hospital's Neighborhood Health Centers, Habitat for Humanity receive special recognition.

In his remarks about this year's winner of the Community Foundation's annual Leighton Award for Nonprofit Excellence, Leighton Award Committee Chair Jim Keenan noted that over the years, participants in the Leighton process had wondered if a relatively small nonprofit could ever win the prestigious award.

With an annual budget of only \$400,000 Saint Margaret's House—a local nonprofit that serves women who struggle with poverty—has proven that the answer to that question is a resounding “yes.”

A total of 12 nonprofit organizations

competed for the 2012 Leighton Award, which is the largest prize of its kind in the country. As in years past, the winning organization receives a \$100,000 challenge grant which it must match within a year. The resulting \$200,000 is placed in an endowment fund at the Community Foundation for the winning organization's benefit. There's also a \$10,000 cash prize that comes with the award.

In many respects, St. Margaret's House is much bigger than it appears. Volunteers make up 90% of its workforce, performing vital functions that would normally be carried out by paid staff. The Cathedral of St. James donates the use of their building. Using the Food Bank and other resources, St. Margaret's House manages to provide more than 23,000 meals for \$14,000 in food costs. In addition, St. Margaret's House

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staff help link their guests to a wealth of other services provided by local health and human service organizations.

St. Margaret's House treats each guest as an individual with her own unique story—typically one of poverty, limited education, addiction and abuse—focusing on each woman's gifts and talents, rather than her deficits or problems.

Kathy Schneider, executive director of St. Margaret's House for twenty years, praised her staff in her acceptance speech, saying, warmly, "These are women who come with their hearts open every day to help the children of God."

The Foundation also named two \$10,000 Special Recognition award winners. Memorial Hospital's Neighborhood Health Centers, which include the Southeast Clinic and the Central Clinic at the Center for the Homeless, received the first award. Through its Neighborhood Centers, Memorial demonstrates its unwavering commitment to increasing both the scale and quality of care for our community's underserved residents. The Foundation's second Special Recognition award went to Habitat for Humanity of St. Joseph County, recognizing its important work building new homes, providing zero-interest mortgages to its families, and opening the attractive and high-performing ReStore in South Bend, which has become a model for ReStores in other communities.

Established by Judd and Mary Lou Leighton and the Leighton-Oare Foundation in 1999, the Leighton Award encourages all of the community's nonprofit organizations to pursue excellence at every level of their operations.

Encourage excellence among our community's nonprofits by helping St. Margaret's House meet its Leighton Award challenge grant. Donate to the St. Margaret's House Fund at the Community Foundation online at [www.cfsjc.org](http://www.cfsjc.org) or by phone at (574) 232-0041.



Jim Keenan, Leighton committee chair; Denise Berscheit, St. Margaret's House board chair; Kathy Schneider, executive director of St. Margaret's House, and Community Foundation President Rose Meissner.

## Dan Harshman on Local Philanthropy

The following is excerpted from the Leighton keynote address, delivered by Dan Harshman, retiring CEO of LOGAN.

Ever since the article came out about South Bend being a "dying city," and after hearing the *Benchmarking Report* produced by Karl King and John Roos, I've been trying to come up with a way to describe why I like living here and what it is about our community that holds so much potential. How can I describe my belief that we are an **extraordinarily philanthropic community**—and that we're a place that cares about people in need?

This caring is more measurable than we've said or tried to pull together. Maybe we can get the Community Foundation to help us find a way to develop "philanthropic measurements" so we can better understand the resources we do have, and how best to grow them and use them to continue to attack our problems.

In this time of a growing polarization and dysfunctional political discourse, the nonprofit sector presents a strikingly useful alternative. Our boards, volunteers, and

donors are never asked their political views, like the role of government spending, the war in the Middle East, or their thoughts on abortion. It's as if the nonprofits are on the ground and the politicians and pundits are 100,000 feet above ground. We literally have come together, focused on the task at hand, and are giving our time, talents, and resources to improve the lives of people in need. We come from every political persuasion, diverse economic and social backgrounds and we're working together. We're an important part of the answer to how communities move forward in attacking its problems.

We obviously have social and economic problems, most of which are similar to any region our size or larger. The key for me is not thinking about our problems in ways that generate fear or guilt, which are emotions that usually lead to blaming someone, inactivity, and depression; this is not the framework we need to keep addressing these complex problems. [We could collect data] to help us understand and tell others what we're doing about addressing our problems in a framework of hope and progress.

If we were to put this information in terms of effectively caring for people in need, and

to use for example the past Leighton Award winners, we might describe our community in terms that focus on people, like this....

—When you face the need to care for your aging parents and grandparents, and hope to help them live as independently as possible and have quality support services, we have an outstanding seniors support organization, [REAL Services](#)...

We literally have come together, focused on the task at hand, and are giving our time, talents, and resources to improve the lives of people in need.

—As you face the need to deal with end of life supports, we provide great quality care through the [Center for Hospice](#)...

—For those women who are poor or even abused by a family member, we have an exceptional advocate and service provider in the [YWCA](#)...

—To help respond to the challenges of homelessness, mental illness, poverty and addictions, we have the remarkable [Center for the Homeless](#)...

—To add to the quality of life in the community, through entertainment, inspiration, and education we have a vibrant arts community lead by the outstanding [South Bend Civic Theatre](#)...

—We care about revitalizing our neighborhoods and providing affordable housing, and we have one of the finest redevelopment organizations in the country in the [South Bend Heritage Foundation](#)...

—We are committed to job training for those who are poor, disabled, and underserved through the outstanding services of [Goodwill Industries](#)...

—We are leading the way in cutting-edge access to information technology for all of our citizens through the leadership of a

nationally recognized library system in the [St. Joseph County Public Library](#)...

—We are working hard at addressing the need for health care for the poor through hospital-sponsored neighborhood health care clinics, especially the [Sister Maura Brannick Health Center](#)...

—Women facing difficult decisions about continuing a pregnancy can find valuable support from the [Women's Care Center](#)...

—We have tremendous support services for young boys and girls from disadvantaged neighborhoods, for teenagers in trouble, and for families facing economic hardships through the comprehensive services offered by the [Family & Children's Center](#)...

—If you or a family member have a child or young adult facing developmental disabilities or delays in their development, we have an outstanding resource in [LOGAN Community Resources](#).

Along with developing this data about the impact of the not-for-profit community, we have been blessed with another major resource—the Community Foundation of St. Joseph County. The Community Foundation, through its board and staff,

has become a significant catalyst and innovator for our community. They have provided unmatched investment management expertise and state-of-the-art investment and spending policies. They have encouraged us, challenged us, and recognized our efforts, because they believe in us.

The good news about our community is not meant for us to rest on our laurels. The good news should build our confidence so that we can address our problems with a hopeful sense of responsibility to care for each other. With the announcement of this year's Leighton winner, we have a new story to celebrate, and another step in growing our assets.

The Community Foundation, through its board and staff, has become a significant catalyst and innovator for our community... because they believe in us.

I feel very lucky to have worked with so many of you in the nonprofit community. I look forward to our mutual progress and achievements as we move forward. There is much to do—and no better group to do it with.

—*Dan Harshman, CEO of LOGAN*



Dan Harshman, retiring CEO of LOGAN—first winner of the Leighton Award—gave the keynote address.

# Focusing on Our Donors: George Resnik

Donor George Resnik maximized the power of his years of retirement savings by donating his IRA to the Community Foundation.

For many of us, our religious beliefs play a major role in shaping our personal values and guiding our actions. As a committed Catholic, George Resnik believed that philanthropy was both a privilege and a responsibility. He belonged to the Knights of Columbus, the Archbishop John Carroll Council, the Serra Club, and the Knights of Malta. A member of St. Joseph's Catholic Church in Mishawaka, Mr. Resnik "joyfully sang with their choir," as his obituary noted.

A lifelong resident of our community, Mr. Resnik was a graduate of the University of Notre Dame with a degree in chemical engineering. For over 60 years, he worked at Watcon, a company which provides water treatment programs for industrial, commercial, and institutional operations.

Mr. Resnik diligently built his IRA account throughout his career. At the end of his life, he used those retirement assets to create a permanent fund with the Community Foundation that will support causes that he cared about forever.

Giving through an IRA, 401(k), 403(b), or Keogh plan is a particularly savvy way to maximize the power of philanthropy. When these retirement savings vehicles are bequeathed directly to children or grandchildren, federal estate taxes, state inheritance taxes, and federal and state income taxes can reduce the value of the gift by as much as 70%. As an example, a recipient could receive as little as \$300,000 from a \$1,000,000 IRA after taxes.

But when IRAs are bequeathed directly to a qualified charity, the funds bypass the otherwise applicable taxes. As part of an overall estate plan, a good strategy is to specify that assets qualifying for a "step up" in basis at death be transferred to children,

while retirement funds make up any intended charitable bequests.

For George Resnik, "giving back" was a central part of life. His large family—nine children, six stepchildren, 27 grandchildren, and 11 great-grandchildren—knew this about him, and appreciated it.

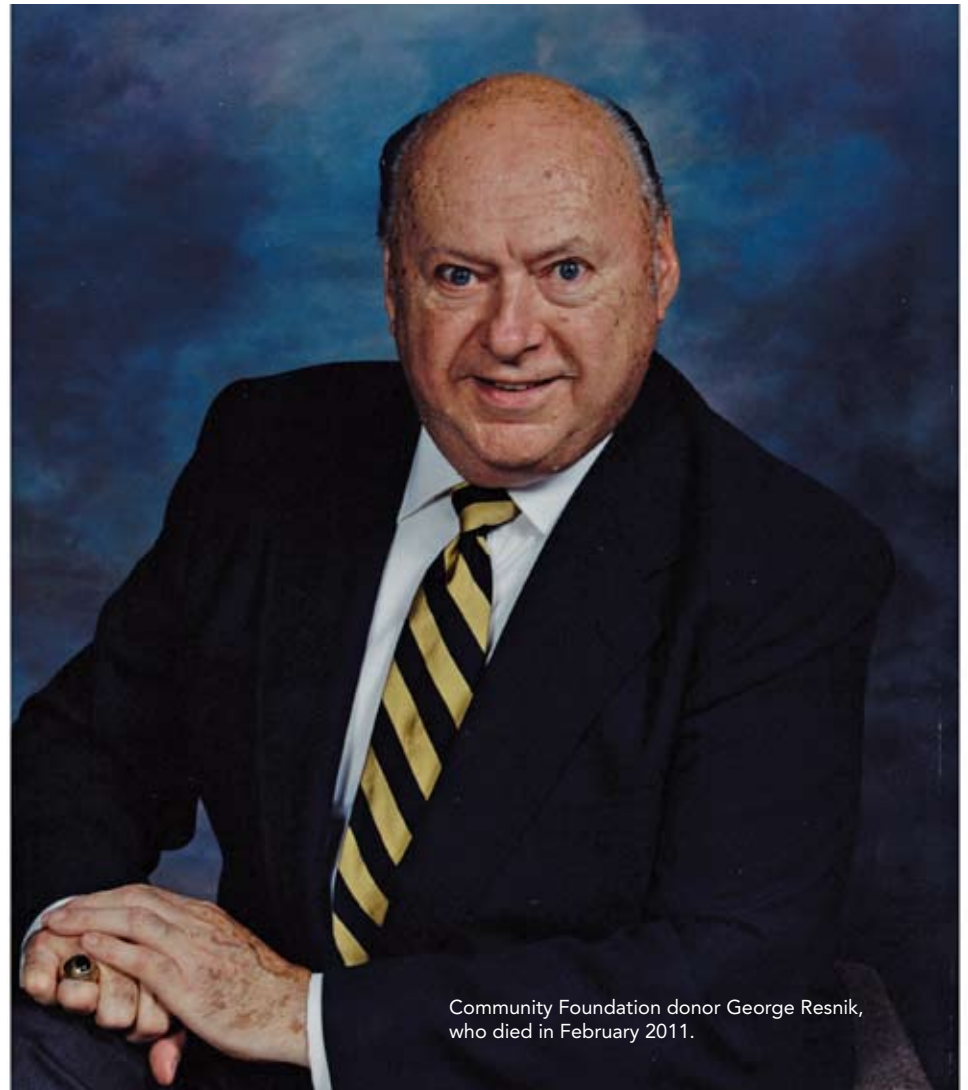
"Generosity was a big part of what my dad was about," his son, George Resnik, Jr., says. "It was very important to him to be able to help. He worked long and hard to make sure he was in a position to do this."

During his life, Mr. Resnik generously supported many causes, including the Women's Care Center, University of Notre Dame, LOGAN, and St. Vincent de Paul.

Now, through the George Resnik Fund at the Community Foundation, his generosity will continue to support causes true to his personal values forever.

Whether you give through an IRA, a gift annuity, a charitable remainder trust, or a simple bequest, the first step to planned giving is creating a will.

Do you have a will? If not, the Community Foundation offers a free "Guide to Planning Your Will and Trust" online or through the mail. This guide will help you gather the materials you'll need to work with your attorney or estate planner to create a will. Find it at [www.cfsjc.org](http://www.cfsjc.org) under "For Donors."



Community Foundation donor George Resnik, who died in February 2011.



Tsung Yeh conducts the South Bend Symphony for its August 27 performance at Potawatomi Park.

## Major Challenge for Symphony

The SBSO has received a major two-for-one challenge grant opportunity, facilitated by the Community Foundation.

It's a tough time for America's symphony orchestras. Reduced revenues, shrinking endowments, and battles over musicians' contracts have stressed many organizations and even caused some to close, including the Syracuse Symphony Orchestra and the Honolulu Symphony.

The South Bend Symphony Orchestra has managed better than many of its peers, maintaining its roster of performances and educational programming. Jane Hunter, the SBSO's executive director, cites the support of the Symphony's donors and sponsors as key to the organization's continued success.

Recently, one family stepped forward with an unprecedented show of confidence in the Symphony and its operations.

The family of Christopher H. Wilson offered the SBSO a major gift with a two-to-one matching component for up to \$1 million.

That means that if the organization raises \$500,000 in funds, it will receive a total of \$1.5 million.

Of that, \$250,000 will go to replenish cash reserves, which have dwindled during the recent recession. The remaining \$1.25 million will go into an endowed fund with the Community Foundation for unrestricted support.

"This is a tremendous opportunity," says Hunter. "We're extremely grateful to the Wilson family and to the Community Foundation for facilitating this. It comes at a time when we're revising our business model to reflect the changed and more eclectic listening habits of both performers and audiences."

In recognition of the family's generosity, the Symphony has named its principal flute chair, currently held by Leslie Short, for Christopher H. Wilson.

You can help the Symphony maximize this grant opportunity with your donation: Contact Jane Hunter, Executive Director, at (574) 232-6343.

## Remembering Katie: 10 Years After 9/11



The September 11, 2001 tragedy may have happened more than 600 miles from our community, but for Dick and Anne McCloskey, the impact was as shattering as if the Twin Towers had stood on South Bend's Michigan Street.

The McCloskey's daughter, Katie, was one of the nearly three thousand victims of the most deadly attack on American soil in our country's history. A 1994 graduate of John Adams High School, Katie worked as a computer help-desk technician on the 97th floor of the World Trade Center. She could see the Statue of Liberty from her window.

To honor their daughter's memory, the McCloskey family established the Katie McCloskey Memorial Scholarship Fund with the Community Foundation. The fund provides recipients with a \$2,500 renewable scholarship. Since 2002, the scholarship fund has awarded \$66,750 to 10 John Adams graduates. Currently, four students have Katie McCloskey scholarships.

Ten years after 9/11, Katie McCloskey remains very much alive in the hearts of those young people who are pursuing a college education with help from the fund established in her memory.

To support the Katie McCloskey Scholarship Fund or learn how you can create an endowed scholarship fund with the Community Foundation, visit [www.cfsjc.org](http://www.cfsjc.org).

# Foundation Supporters Come Together for Annual Meeting and Celebration

It's always good to have an excuse to get together with people who share your values and your dreams—and for many Foundation supporters, the Annual Meeting and Celebration provides just that kind of “excuse.” Held at the Center for History on September 13, this year's Annual Meeting drew some 100 friends of the Foundation for updates about the past year, ongoing and new initiatives, and the Foundation's future.

In her remarks, Community Foundation President Rose Meissner reviewed some of the highlights of the past year, including the 2012 Leighton Award for Nonprofit

Excellence, which honored St. Margaret's House for its outstanding work with women in poverty, and also recognized the contributions made by Memorial Hospital's Neighborhood Health Centers and Habitat for Humanity of St. Joseph County (full story on p. 1); the Community Foundation's “Perfect 10” party, held at the Morris Park Country Club in June to celebrate a small group of individuals who have given ten or more years of service to the Foundation; and the recently announced million-dollar Wilson Family challenge grant to the South Bend Symphony Orchestra, an opportunity which the Foundation facilitated (full story on p. 5).

Ann Rosen and Sue Christensen, co-directors of the Family Connection and facilitators of the Community Foundation's Early Years Count education initiative, presented attendees with a slide show and update on the status of this important initiative, which recently celebrated its ten-year anniversary. Through the Early Years Count initiative, more than 500 local preschool teachers, assistants, directors, and other program staff have been trained in the High/Scope preschool curriculum; \$235,000 in materials has been distributed to early childhood classrooms; and more than 600 assessments have been performed to determine the effectiveness of the



The foyer of the Center for History, where Annual Meeting and Celebration attendees connected with each other while enjoying wine and hors d'oeuvres

program. Across the board, the Early Years Count initiative has dramatically improved the quality of early childhood education available to children in St. Joseph County.

Next, Christopher Nanni, the Foundation's vice president, program, spoke about a new initiative for the Foundation: the Nursing Home Learning Collaborative, designed to work with our community's nursing homes to help them improve the quality of long-term nursing care. Nanni then introduced Joseph Flacke, executive director of Kindred Transitional Care and Rehabilitation—South Bend (formerly Regency Place). Flacke spoke with enthusiasm about his experience with the Learning Collaborative, citing positive changes it was making at Kindred, specifically with staff retention efforts (for the full story, see adjacent column).

Through the Early Years Count initiative, more than 500 local preschool teachers, assistants, directors, and other program staff have been trained in the High/Scope preschool curriculum.

The Foundation welcomed five new and returning Board members at the meeting: Virginia Calvin, who, with her husband Richmond, lead a million-dollar campaign to build the African American Community Fund; Mary Jan Hedman, executive director of the St. Joseph Valley Metronet; Dr. Vincent Henderson, a family physician and Chair of Memorial Medical Group; Jeff Rea, director of the Chamber of Commerce of St. Joseph County; and Greta Roemer Lewis, local attorney and daughter of longtime Foundation supporter Chuck Roemer.

For more information about how you can become part of the Community Foundation of St. Joseph County's efforts to improve the quality of life in our community, now and long into the future, visit [www.cfsjc.org](http://www.cfsjc.org).

## SENIOR ISSUES: IMPROVING THE QUALITY OF NURSING HOME CARE

As part of this year's Annual Meeting and Celebration, Christopher Nanni, the Foundation's vice president, program, took the podium to describe a new leadership initiative that the Foundation has created to address a major need in our community.

In the past, Nanni began, the Foundation's efforts on behalf of senior citizens in our community have focused on helping seniors stay in their own homes as long as possible. In partnership with REAL Services, the Foundation has made major advances in this area, including bringing in a Weinberg Foundation challenge grant worth \$1.2 million to create Caregiver Connection, a program that supports informal caregivers of seniors in the 46619 ZIP code. However, Nanni explained, it's simply not possible for all seniors to stay in their own homes indefinitely because of the increasingly complex medical issues many of them face. This new initiative—the Nursing Home Learning Collaborative—focuses on improving the quality of care in our community's long-term nursing facilities, bringing together the primary administrators and care providers of the 18 nursing homes in St. Joseph County. Through a year-long program of group sessions and individual site visits facilitated by nationally recognized long-term care consultants Cathy Brady and Barbara Frank, this initiative aims to help nursing homes in whatever areas they self-identify as most critical to their success: training and mentoring staff, working with



Joseph Flacke, executive director of Kindred Transitional Care and Rehabilitation—South Bend (formerly Regency Place)

compliance standards, limiting staff attrition, or other issues.

Joseph Flacke, head administrator for Kindred Transitional Care and Rehabilitation—South Bend (formerly Regency Place), a participant in the Learning Collaborative, spoke to the Annual Meeting and Celebration attendees about his enthusiasm for the program. For Kindred, he notes, the program has really helped reduce staff turnover, bringing everyone together to build investment in reworking internal processes and creating buy-in.

Developed in response to Indiana's low national ranking for quality of nursing home care, this new initiative has already drawn attention in Indianapolis, where the nursing home industry will begin replicating the program in January.



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## UPCOMING DATES AND DEADLINES

- October 19: Annual Meeting for the Foundation's Nonprofit Partners at the St. Joseph County Public Library
- November 1: Deadline to apply for the Foundation's Senior Housing grants and ArtsEverywhere grants
- November 11: Winter issue of *ArtsEverywhere* magazine available in the *South Bend Tribune* and at other pick-up locations throughout the South Bend area

For more information, call the Community Foundation at (574) 232-0041 or visit [www.cfsjc.org](http://www.cfsjc.org).

## Potawatomi Play Equipment Arrives

The new equipment has landed! The "Fun for All" playground at South Bend's Potawatomi Park now has a new net climber and some additional high "fun factor" universally accessible play equipment. These new pieces, funded with a \$91,000 second-round Access to Recreation grant from the Kellogg Foundation, make the original "Fun for All" project even better.

A collaboration between the Community Foundation and South Bend Parks, "Fun for All" has made Potawatomi Park more accessible to our entire community with a popular new playground, walking paths throughout the park, and an endowment to support universal design throughout the parks system.

In addition to the new play equipment, four pieces of exercise equipment will be installed near the playground by the end of October, providing recreational opportunities for adults.



Make sure to stop by Potawatomi Park this fall and try out the new equipment with your family.

Learn how you can support the Community Foundation's efforts to make our county a better place for every resident at [www.cfsjc.org](http://www.cfsjc.org).