

Community Foundation  
of Southern Indiana  
*Partner. Resource. Steward.*

# 2017 ANNUAL REPORT

Our vision is to be the partner and trusted resource for philanthropy in our community, providing stewardship of charitable intent so the impact of generosity will last for generations.



Dear Friends,

Since 1991 the Community Foundation of Southern Indiana has worked to be this community's partner, resource and steward in philanthropy. We help this community be greater in three ways:

1. We partner with individuals, businesses and families to establish charitable funds to support the causes important to them.
2. We make community grants that address our region's greatest needs and provide scholarships to help the next generation be successful.
3. We provide leadership on important issues, bringing together the right people at the right time to accomplish incredible things.

As you'll see while you browse through this report to the community, we're making a difference in Southern Indiana by focusing on these three core areas – community leadership, grants and scholarships, and personal philanthropy – and it's all because of your support. This is our home, and we're driven by you to make Southern Indiana the best it can be. We hope to inspire you to get involved and make an impact. And, when you're ready, give us a call and find out how you can join us on our journey to make this the best community it can be.

Sincerely,

Linda S. Speed, J.D.  
President and CEO

Phillip Beaman  
Chair, Board of Directors

# CFSI Provides...

community leadership on important regional issues, grants and scholarships to make this a better place to live, work and play, and is a philanthropic partner that connects people to the causes they care most about.

**We've taken our annual report online.** We hope you enjoy learning more about CFSI through this abbreviated version, and that you'll visit our website at [www.cfsouthernindiana.com](http://www.cfsouthernindiana.com) to read the full stories, see donor and fundholder listings and more.





# The Les and Virginia Albro Family Fund

## Passing On the Values of Giving Back

Les Albro established a family fund at the Community Foundation of Southern Indiana to continue a tradition of giving back. "CFSI is helping my family give back in meaningful and impactful ways," he said. "But most importantly, we're doing it together, as a family – learning about what each of us is passionate about and having fun giving back."

At CFSI, we help individuals, families, and businesses give back in meaningful and impactful ways. Last year, CFSI fundholders granted more than \$4.4 million to the causes that are important to them – their church, alma mater, or favorite nonprofits. To read the entire story about the Albro family, find out how your family can start a family giving program, or start your own individual fund, please give us a call or visit our website.

Les Albro and his grandchildren, Noah Lasley, Jonah Lasley, Emily Lewis, and Ryan Lewis.

CFSI fundholders granted more than **\$4.4 million** last year.

**THANK  
YOU!**

**Last year  
our grants to  
area nonprofits  
helped them serve  
72,000 people in  
Clark and Floyd  
Counties**

To our community, donors, fundholders and Legacy Society members, we say thank you for helping us make a difference in Southern Indiana. We're applying our resources to address the greatest needs of our community, and because of your support, last year our grants to area nonprofits helped them serve 72,000 people in Clark and Floyd counties. Thank you for allowing us to be the partner, resource and steward for philanthropy in our community.

**To see a listing of our donors and Legacy Society members,  
please visit our website at [www.cfsouthernindiana.com](http://www.cfsouthernindiana.com).**

# Michael "Mick" Ward

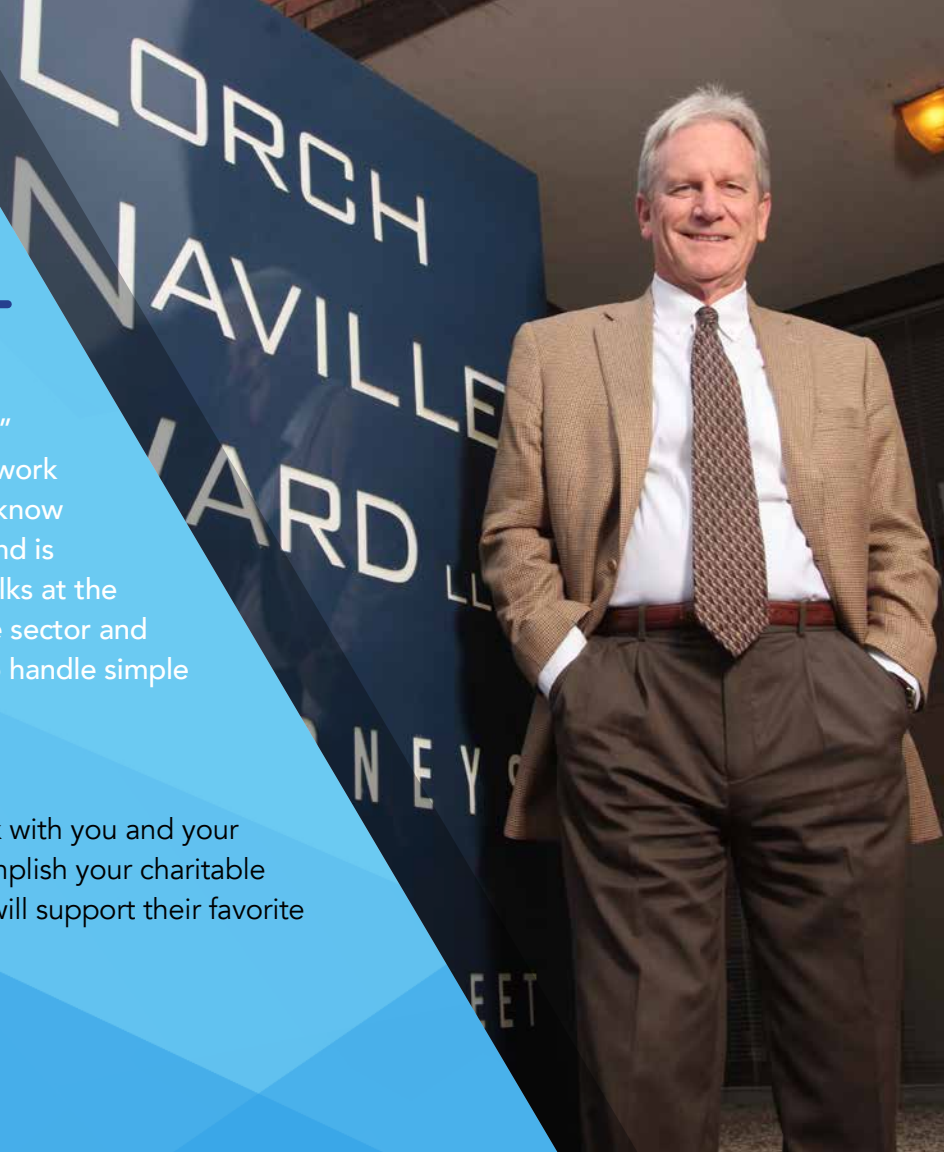
## Helping Clients through CFSI



I really enjoy working with members of our community, building strong and trusting relationships with my clients and helping them accomplish their goals," Mick said. "That's also the reason I encourage clients to work with the Community Foundation of Southern Indiana – I know the Foundation will make it easy for them to give back and is going to take care of them the same way I would. The folks at the Foundation are very knowledgeable about the charitable sector and operate with a level of sophistication that allows them to handle simple or complex giving arrangements.



The Community Foundation of Southern Indiana will work with you and your professional advisor to create a customized fund to accomplish your charitable goals now, as well as those who want to leave a gift that will support their favorite nonprofit, school or church through their will.





# Getting Involved in Giving Back

## Your Chance to Make an Impact

Everyone has their own unique interests and ideas on how to give back to their community. Maybe you want to get your children and grandchildren involved as a family in your giving, establish a scholarship, provide support for your church or alma mater, leave a legacy through your will, or simply help address our community's greatest needs.

Whatever your financial or charitable goals, whatever your means, whatever your passions, the Community Foundation will help make your giving easy, flexible and meaningful. We'll work with you and your professional advisor to establish a customized charitable fund that supports your favorite causes and makes the most sense for your personal situation. But it starts with you, your passions and ideas for how you'd like to make this world a better place. **We can help you do that. I invite you to call me at (812) 948-4662 and start the conversation about your charitable vision.**

- Scholarship Funds
- Donor Advised Funds
- Charitable Checking Accounts
- Legacy Funds
- Community Impact Funds
- And more



**Linda Speed,**  
*President and CEO*

# Addressing Needs, Strengthening Community

## Jeffersonville Tree Walk

Our Community Needs Assessment identified our region's greatest areas of need and has helped us direct our grantmaking to areas where we can be the most impactful. Last year, CFSI granted more than \$316,000 from our Community Impact Fund to 53 local organizations that are strengthening our community and making it a better place to live, work and play.

Jeffersonville's Tree Walk provides access to recreational and educational activities while helping improve our air and water quality – which is why the Community Foundation supported the project through a Community Impact Grant. Chad Reischl, City Planner for the City of Jeffersonville, said, "The City of Jeffersonville is thankful to have partners like the Community Foundation of Southern Indiana who are helping us transform the city. The Tree Walk is a perfect example of how their grants and the support of our community are making an impact in Jeffersonville. The Tree Walk has many health and educational benefits and, when finished, will be a wonderful new amenity for the downtown area."

An aerial photograph of a park area. A winding paved path curves through a green lawn. There are several trees with autumn-colored foliage (yellows, oranges, and reds) scattered throughout the scene. In the background, a black metal fence runs along the edge of the park, and beyond that, some buildings and a street with a stop sign are visible. The overall lighting suggests it's late afternoon or early morning, with long shadows.

CFSI granted more than **\$316,000** from our Community Impact Fund to 53 local organizations



# Changing Lives through Community Grants

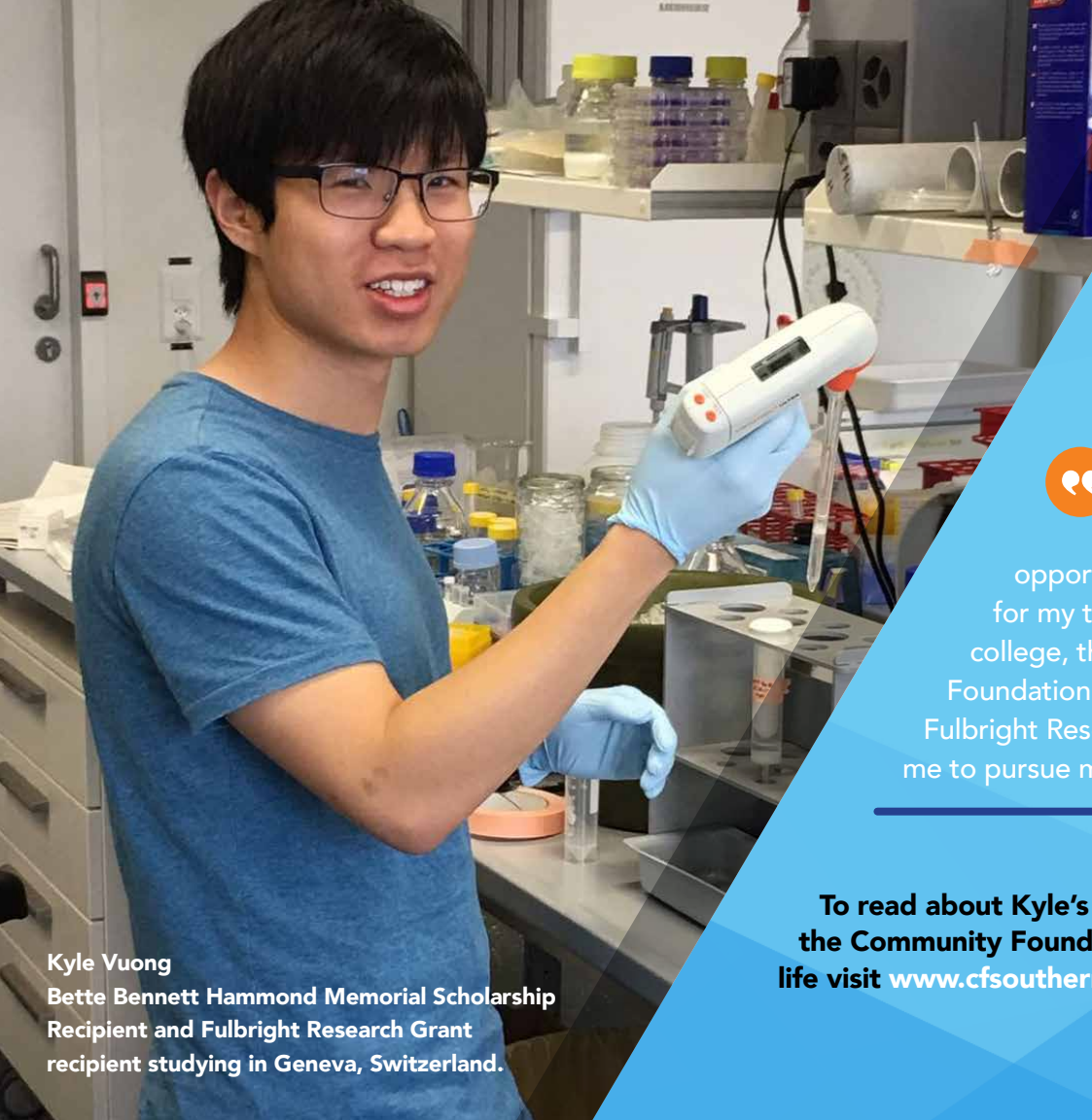
## Personal Counseling Services

Since 1991, CFSI has used our unrestricted Community Impact Fund to grant over \$2.4 million to organizations serving the residents of Clark and Floyd counties. The Community Impact Fund provides resources that address the evolving needs of our region.

"The Community Foundation is making a difference and changing lives in our community," said Doug Drake, CEO of Personal Counseling Services. "Because of their grants, nonprofits across our region are more impactful. A grant from CFSI allowed us to launch a pilot program at Fairmont Elementary where a therapist provided assessments, one-on-one therapy, classroom observation, and trained teachers to handle specific behaviors to help students be successful. Our program, with the help of the Community Foundation, is providing the resources students will need to have a great education and life."



**PCS therapist, Rebecca Street,  
works with students.**



Kyle Vuong  
Bette Bennett Hammond Memorial Scholarship  
Recipient and Fulbright Research Grant  
recipient studying in Geneva, Switzerland.

# CFSI Scholar

**Kyle Vuong is Pursuing His  
Dreams as a Fulbright Scholar**

Scholarships held and administered by CFSI offer students a sometimes life-changing opportunity to continue their education and pursue their dreams.



I couldn't be more thankful for the opportunities provided me. I feel very fortunate for my time and experiences in high school and college, the scholarship from the Community Foundation of Southern Indiana, and now the Fulbright Research Grant because they've all allowed me to pursue my dreams.



**To read about Kyle's story and learn how a scholarship from the Community Foundation of Southern Indiana changed his life visit [www.cfsouthernindiana.com](http://www.cfsouthernindiana.com).**

# Scholarships

In 2017, CFSI distributed 133 scholarship awards with a combined value of over \$600,000 including our Lilly Scholar awards. Thank you to each of our scholarship fundholders and the donors who make these life-changing scholarships available to our community's students.

A full list of scholarship funds can be found on our [website](#).

## Lilly Scholars

These four seniors from Clark and Floyd counties were chosen from 218 applicants to receive full four-year scholarships from the Lilly Endowment Community Scholarship Program.



**Elizabeth Bishop**  
Jeffersonville  
High School



**Tori Denison**  
Our Lady of  
Providence High  
School



**Kayla Taff**  
Floyd Central  
High School



**Catianne Troncin**  
Rock Creek  
Community Academy

# Community Leadership

## Doing More Together

By working together, we can accomplish so much more than we can by working alone. At CFSI we believe in providing leadership on important community issues – partnering with other organizations to create change and make a positive impact on our community.



Last year the Women's Foundation of Southern Indiana, a fund of the Community Foundation of Southern Indiana, launched a new program called Impact 100. Impact 100 empowers women to dramatically improve lives by collectively funding significant grants that make a lasting impact in our community. Their \$50,000 grant to St. Elizabeth Catholic Charities started a new teaching kitchen where residents can learn culinary skills and food industry essentials – teaching the skills needed to work and find employment in the food service industry – helping end the cycle of poverty that so many in our community face.



Align Southern Indiana is a new regional initiative that actively facilitates a shared regional process to align resources, address needs and produce sustainable solutions resulting in our region achieving its potential as a best place to live, work and play. It brings together community leadership and representation from all sectors of Southern Indiana's Clark, Floyd, Harrison, Scott and Washington counties to build greater alignment for the future success of the region. CFSI has invested a multi-year commitment of \$165,000 through a Community Impact Grant to get this important initiative started, and provides leadership on the governing board.





# Youth Philanthropy Council

## Our Community's Future

The Foundation's Youth Philanthropy Council is designed to encourage youth to give and serve in their communities. Annually, this group of bright, energetic next generation leaders learn about philanthropy, complete community service projects, and run a competitive grant cycle that awards area nonprofits important funding to address the needs of our region's youth.

Since 2001, the YPC has granted  
**OVER \$121,000** including \$10,400 last year.

Director of Community Philanthropy,  
Crystal Gunther, works with a member of the YPC.



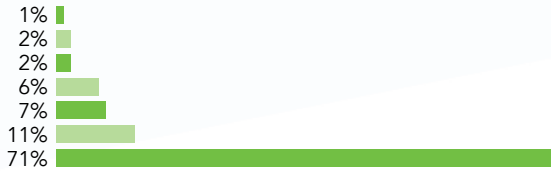
# 2017 Financial Highlights

Total Assets as of December 31, 2017.....\$ 107,047,034  
Total Gifts in Calendar Year 2017.....\$ 749,189

Total Number of Gifts.....366  
Total Grants in Calendar Year 2017.....4,748,710

## Endowed Funds – By Type

Planned Gift Funds.....\$ 1,328,144  
Agency Funds.....1,804,149  
Field of Interest Funds.....2,140,684  
Donor Advised Funds.....6,374,848  
Board Advised Funds.....7,037,061  
Scholarship Funds.....11,450,429  
Donor Designated Funds.....73,208,770



**TOTAL ENDOWED FUNDS** \$ 103,344,085 100%

## Non-Endowed Funds – By Type

Agency Funds.....\$ 6,644  
Planned Gift Funds.....15,233  
Donor Designated Funds.....62,971  
Field of Interest Funds.....77,102  
Scholarship Funds.....86,400  
Donor Advised Funds.....1,237,353



**Total Non-Endowed Funds** \$ 1,485,703 100%

**TOTAL FUNDS** \$ 104,829,788

## CFSI Community Impact Fund Grants \*

Community Development.....\$ 156,920  
Health.....37,539  
Arts and Culture.....13,114  
Education.....28,913  
Human Services.....44,161  
Environment.....15,061  
Youth Development.....21,092

**TOTAL COMMUNITY IMPACT GRANTS** \$ 316,800

\* General fund for community needs

## Grants by Purpose - Donor Funds \*

Community Development.....\$ 3,527,203  
Religion.....65,242  
Health.....30,051  
Arts and Culture.....32,578  
Education.....82,790  
Human Services.....237,711  
Environment.....9,100  
Youth Development.....19,984  
Recreation.....3,140  
Scholarships.....424,111

## TOTAL DONOR FUND GRANTS

\* Funds supporting individual donor interests

**TOTAL GRANTS** \$ 4,748,710

**\$ 4,431,910**

# Board of Directors

The members of the Board of Directors of the Community Foundation of Southern Indiana assure that the Foundation's resources are used efficiently and effectively to accomplish our vision and mission.

**Chair:** Phillip Beaman

**Vice Chair:** Bill White

**Treasurer:** Adam Naville

**Secretary:** David Hussung

**Immediate Past Chair:** Gary Banet

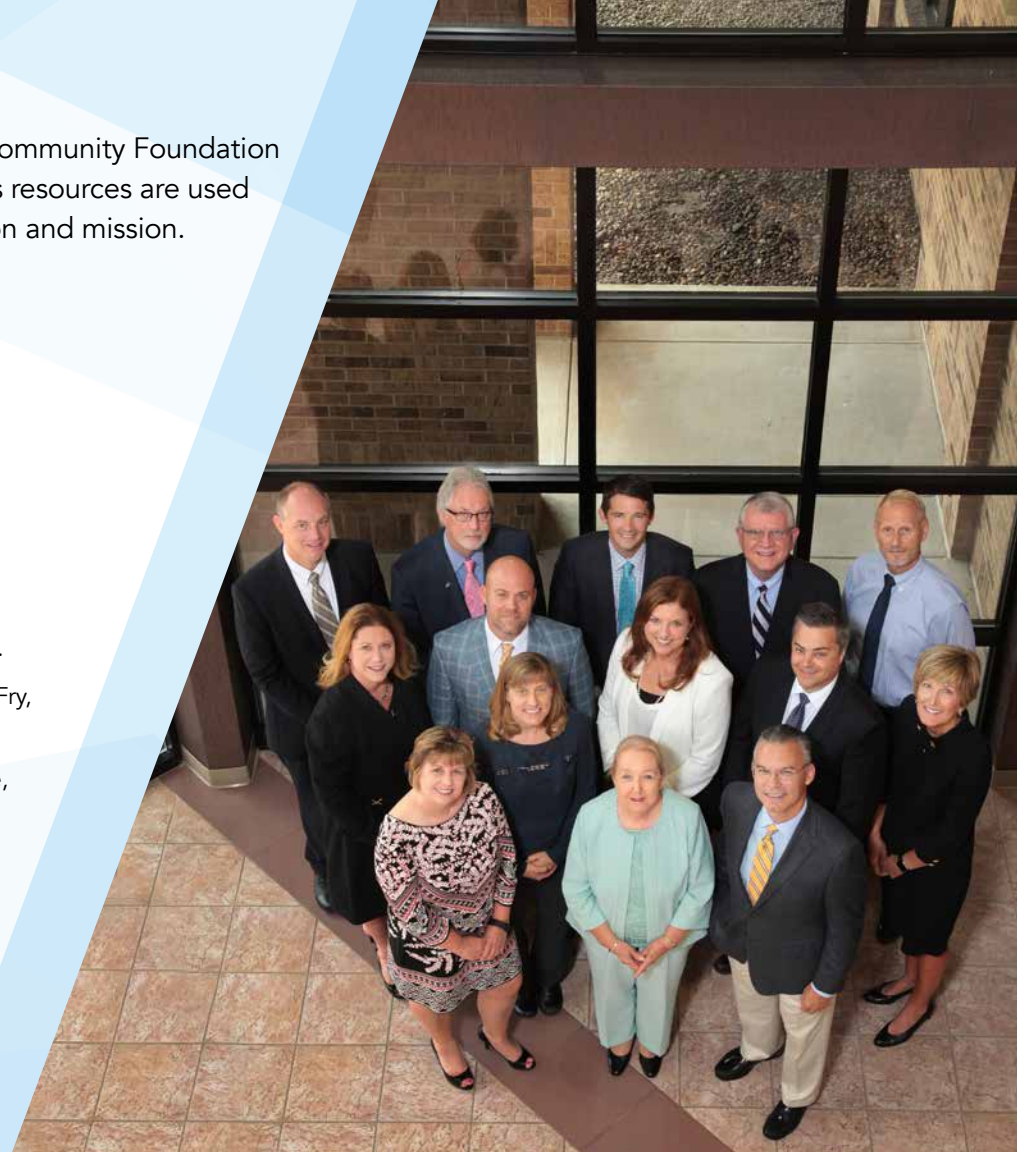
**Pictured, from left:**

*Front Row:* Lisa Brones Huber, Sue Sanders, and Bill White.

*Second Row:* Catherine Sherrard, David Hussung, Melissa Fry, Linda Speed, Phillip Beaman, and Barb Geltmaker.

*Back Row:* Damon Massey, J. Terrence Cody, Adam Naville, R. Gregory Neely, and Bill Hanson.

*Not Pictured:* Gary Banet, Jay Conner, Larry Ricke, Kyle Ridout, and Bob Woosley.



## Staff Members



Linda Speed  
*President and CEO*



Melany Wessels  
*Senior Director of  
Finance and Operations*



Crystal Gunther  
*Director of  
Community Philanthropy*



Kenton Wooden  
*Director of Community  
Outreach*



Margaret Brinkworth  
*Grants and Scholarship  
Associate*



Renee' Wyman  
*Administrative Assistant  
and Office Manager*



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Excellence, Accountability, Impact™

Confirmed in Compliance with  
National Standards for U.S.  
Community Foundations