



A GROWING FOUNDATION

2016 ANNUAL REPORT



Community Foundation
of Southern Indiana
Partner. Resource. Steward.

Dear Friends,

This past year, the Community Foundation of Southern Indiana celebrated its 25th anniversary. Without question, it was a landmark year – a year where we continued to grow and expand our impact throughout this great community.



In 2016, the Community Foundation of Southern Indiana...

...went to work addressing the needs identified in our 2015 Assessment of Needs and Priorities in Clark and Floyd Counties, making 39 grants worth over \$269,000 from the Foundation's unrestricted Community Impact Fund.

...met the \$2 million matching goal from the Lilly Endowment Inc. which is helping the Foundation provide an additional \$188,000 annually in grants to support our community.

...awarded nearly \$330,000 in scholarships to help more than 100 students pursue their dreams by continuing their education.

...worked with more than 220 donors - individuals, businesses, nonprofits, families and others - to build the charitable resources available to our community and to establish permanent funds that will honor the charitable intent of each fundholder.

...assisted elected officials in Floyd County to establish the Floyd County Fund, which will permanently put the proceeds from the sale of Floyd Memorial Hospital to work for the community, ensuring a steady stream of reliable income is generated for Floyd County.

Since 1991, we've worked as this community's partner, resource and steward in philanthropy and moving forward we will continue that strong tradition. As you look through this annual report and see how many ways the Foundation provides support to this community, think about the people you could help. Think about how your giving can influence your community now while also leaving a lasting legacy that will inspire others. We invite you to join us on our journey to build a stronger community.

Thank you for your continued support of our mission and the generosity you show our community.

Sincerely,

A handwritten signature in dark ink, appearing to read "Linda S. Speed".

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

A handwritten signature in dark ink, appearing to read "Gary Banet".

Gary Banet
Chair, Board of Directors

Meeting the Lilly Match is Creating Impact in OUR COMMUNITY

Over the last couple of years, the Community Foundation worked to meet a \$2 million challenge grant from the Lilly Endowment, Inc. The matching grant was designed to build permanent endowment funds that the Foundation and our fundholders can use to address the charitable causes that are important to our community.

Due to the support of our entire community, we were able to raise over \$2.9 million in permanent endowment funds by the March 31, 2016 deadline – meeting our matching grant goal.

Because of your support, this successful matching campaign has generated millions in new funds that the Foundation and our fundholders will use to create a positive impact in our community.

Thank you!

100%
OF GOAL
REACHED

\$4.9
MILLION
ADDED
TO CFSI
ENDOWMENT

ADDITIONAL
\$188,000
IN ANNUAL GRANTS
AVAILABLE TO
OUR COMMUNITY

Community Grants – Addressing TODAY'S NEEDS

Since 1991, the Community Foundation's Community Impact Fund has granted over \$2.4 million to organizations serving the residents of Clark and Floyd counties. This permanent, unrestricted fund is used each year by our board of directors and our Community Grants Committee to award grants that provide for the community's most pressing needs.

If you're interested in giving back to the community you call home, but don't have a specific cause in mind or want to provide flexibility to address future needs, your contribution to the Community Foundation's unrestricted Community Impact Fund will support the greatest needs of our community, now and forever. As our region's future needs and objectives may differ greatly from those in place today, establishing a fund within the unrestricted Community Impact Fund will provide important flexibility to future Foundation leaders, helping them address the evolving needs of our community.

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2016 Community Grants Provided by the Community Impact Fund Assist Grants (Up to \$5,000)

- Blessings in a Backpack, Inc., Feeding the Future of Clark & Floyd Counties
- Brandon's House Counseling Center, Inc., Counseling for Teenagers and Families in Clark/Floyd Counties
- Choices for Women Resource Center, Inc., Earn While you Learn Blessing Boutique
- Communities In Schools of Clark County, Inc., Tier 1 Services in Clark Co. Elementary Schools
- Community Action of Southern Indiana, Grassroots Family Life Academy
- Family Scholar House, Inc., Learning for Life
- Girl Scouts of Kentuckiana, One Smart Cookie Financial Literacy Workshop
- Greater Clark County Schools, Giving Legs to Literature and Project Discovery Functional Skills Classes
- Jeffersonville Public Art Commission, Family Cultural Festival - Sugar Skull Shake, Shake
- Junior Achievement of Kentuckiana, Inc., Financial Literacy, Work Readiness, and Entrepreneurship Programs for Youth
- LifeSpan Resources, Inc., Lift-equipped Vehicle

- Metro United Way, Inc., Begindergarten in Floyd County
- New Albany Floyd County Consolidated School Corporation, After School Enrichment Program
- Muscular Dystrophy Family Foundation, Inc., Adaptive Equipment Accessibility Project
- Open Door Youth Services, purchase of a mini-van for transportation
- Our Place Drug and Alcohol Education Services, Inc., Early Intervention Program
- St. Luke's United Church of Christ, Loaves & Fishes Project-Feeding the Hungry
- Stage One Family Theatre, Play It Forward-Bringing students to a professional production

Catalyst Grants (\$5,001 - \$15,000)

- Big Brothers & Big Sisters of Kentuckiana, School to Work 1-on-1 Mentoring Program
- Greater Clark County Schools, Alignment Southern Indiana and Student Health Clinics
- Hope Southern Indiana, Incentivized Self-Sufficiency Program
- New Albany Floyd County Habitat for Humanity, 2016 Home Builds

- Purdue Cooperative Extension Service, Bees and Beekeeping A-Z
- St. Elizabeth Catholic Charities, Case management of residents in Maternity Home and Transitional Shelter
- Trustees of Indiana University, Poverty Simulation

Discretionary Grants

- Center For Nonprofit Excellence, Nonprofit Sustainability Workshop
- Clarksville Community School Corporation, Education Block Grant
- Clarksville Little Theatre, Emergency Grant
- The Falls of the Ohio Foundation, Inc., New Film Production
- Greater Clark County Schools, Education Block Grant
- Community Foundation of Southern Indiana, Nonprofit Mapping Project
- Keep New Albany Clean and Green, Town Clock Church Renovation
- New Albany Floyd County Consolidated School Corporation, Education Block Grant
- New Roots, Inc., Fresh Stop Market (New Albany)
- Norton Healthcare Foundation, Pat Harrison Cancer Center
- West Clark Community Schools, Education Block Grant



GCCS Nurse Practitioner, Melissa Davidson

\$269,000 IN GRANTS FROM THE COMMUNITY IMPACT FUND

Education plays a role in many aspects of an individual's growth and a community's well-being. According to the Foundation's 2015 Assessment of Needs and Priorities in Clark and Floyd Counties, improvements in education can put a range of positive feedback loops in motion across all areas of our community, including the economy and healthful living as well as our arts and culture.

In 2016, the Community Foundation awarded a catalyst grant for the Student Wellness Clinics at Greater Clark County Schools.

The Student Wellness Clinics provide care to students across all ages in Greater Clark County Schools and are designed to keep kids in school – helping them gain the learning experiences needed to progress further with their academic careers and become successful and responsible citizens.

Health services coordinator for Greater Clark County Schools, Teresa Stengel, said "After our first year of operating the Student Health Clinic at both Jeffersonville and Charlestown High Schools, we found that

approximately 32% of our students report not having a family care physician. Because of this, instead of addressing an illness when symptoms first present, many of our students' treatable illnesses deteriorated to the point they were missing a more significant amount of school." She continued, "Thanks to this program, our attendance rates are improving because our students are able to remain healthier. When they start feeling ill, a student is able to meet directly with a nurse practitioner free of charge, receive the care needed to treat their illness, and return to class as soon as possible. Simply put, it's helping kids stay in the classroom."

The Floyd County Fund and **The Power OF ENDOWMENT**

In the spring of 2016, Baptist Health entered into an agreement to acquire Floyd Memorial Hospital, creating a once in a lifetime opportunity for the residents of Floyd County. Floyd County's hospital, which had provided healthcare for those throughout our community, was giving back once again.

After months of study, Floyd County leaders decided that a portion of the proceeds from the sale of Floyd Memorial should be protected from immediate spending and used to provide a reliable source of revenue that today's residents will benefit from while still providing for the needs of future generations. In November, the County used \$70 million of the proceeds to establish the Floyd County Fund at the Community Foundation.

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Like all of the Foundation's endowment funds, the Floyd County Fund is a permanent fund which has been invested with the objective of maximizing the return for the County while protecting the principal so it can continue to provide reliable, sustainable resources for the county's needs every year, forever. Most endowment funds are used to build enduring charitable resources that provide support to the causes most important to the individual fundholder, but the Floyd County Fund was created by a governmental unit, and therefore the Foundation will actually provide a grant back to the County each year that elected officials can then use to address the needs they feel are most important to the County and its residents.

Year after year, the residents of Floyd County will benefit from the establishment of the Floyd County Fund. Annually, the Fund will provide millions of dollars of support to the County. This could mean new parks, roads, bridges, safety personnel and equipment, resources for children and the needy or a host of other things. Whatever the future brings, through its endowment with the Community Foundation of Southern Indiana, Floyd County has put in place a mechanism that will allow it to continue providing support for all of Floyd County, for generations to come.

Endowment Funds – An Investment in the Future

When a donor creates an endowment fund with the Community Foundation of Southern Indiana, they are making the choice to invest in the future. Endowment funds are incredible tools used by individuals, families, businesses and other organizations that allow them to support their favorite charitable causes, forever. When your gift establishes an endowment fund at the Community Foundation your charitable causes receive a grant in your name, each year, forever. The fund balance remains invested with the objective to ensure that sufficient funds are available each year to support your original intent.

CFSI HOLDS
**MORE
THAN
240**
INDIVIDUAL
FUNDS





New Roots' Fresh Stop Markets (above) reserve 75 percent of all shares for those families identifying as having limited resources according to the WIC eligibility guidelines. For more information about New Roots, visit www.newroots.org. For more information about the Community Foundation's Needs Assessment, visit www.cfsouthernindiana.com/cna.

Using Research To Move The NEEDLE

In 2015, the Community Foundation of Southern Indiana released the 2015 Assessment of Needs and Priorities in Clark and Floyd Counties. Having this comprehensive needs assessment revealed who we are as a community and the role the Community Foundation can have within it.

Now we know how we can create positive growth – by focusing on the areas of basic human needs, education, workforce development, healthful living, economy and arts and culture – and where to invest our grants to provide the most impact for our community.

This past year, organizations addressing our community's needs received more than \$269,000 in grants from the Community Foundation of Southern Indiana's Community Impact Fund which provides support for the greatest needs of our community. New Roots, a local organization, was one of those deserving organizations. According to the Needs Assessment, more than 26,000 people in Clark and Floyd Counties are food insecure, including 9,140 children - New Roots is working to address that need. Karyn Moskowitz,

the organization's founder and executive director said, *"We work with fresh food insecure communities to create sustainable systems for accessing the farm-fresh food we all need to be healthy and happy."*

Because of the support from the Community Foundation, New Roots was able to establish a weekly Fresh Stop Market in New Albany, serving 150 Southern Indiana families. Like their other sliding scale pop up markets, New Roots' New Albany Fresh Stop Market connects families facing limited resources (and others who pay more into the pool) to over 50 farmers so they can access farm-fresh food right in their neighborhood, every other week. Since these Markets are co-created and sustained by individuals from the community, this helps provide leadership opportunities to individuals and families with limited resources and a passion for food justice, as well as access to affordable, organic, farm-fresh healthy food.

The Community Foundation is using the 2015 Assessment of Needs and Priorities to identify our greatest needs and supporting organizations, like New Roots, who are working to address those needs.

Ms. Moskowitz said, *"No matter what your income level or what you can afford to pay, everyone gets the same amount of fresh, healthy and local produce. Nobody is turned away."*



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GRANTS
MADE FROM THE
COMMUNITY
IMPACT
FUND

Our Programs – **Community COLLABORATIONS**



**EDUCATION
MATTERS**
Southern Indiana

*An initiative of the community foundations of
Clark, Floyd, Harrison, Scott and Washington Counties*

**Women's
FOUNDATION**
of SOUTHERN INDIANA
a fund of the Community Foundation of Southern Indiana

The Community Foundation of Southern Indiana provides leadership on important community issues and partners with many other organizations in Southern Indiana to help build a stronger community. By working together we can accomplish so much more than we can by working alone. The Community Foundation's own programs include Education Matters Southern Indiana, the Women's Foundation of Southern Indiana, and the Youth Philanthropy Council.

Education Matters Southern Indiana (EMSI)

This program was first established in 2013 to strengthen our workforce and improve the economic advantages of our region by increasing the educational attainment of those adults with some form of post-secondary education but no degree or certification. The program reaches across five counties and continues to grow. Last year, EMSI helped 86 people return to complete an associate's or bachelor's degree, or professional certification.

For more information on EMSI, visit educationmatterssi.org.

Women's Foundation of Southern Indiana

The Women's Foundation of Southern Indiana is a fund of the Community Foundation and its advisory board works to support programs and organizations that improve the quality of life of girls, women and their families in Southern Indiana. Last year, the Women's Foundation made over \$3,500 in grants to support these initiatives and make a positive impact on our community.

For more information about the Women's Foundation, visit womensfoundationsi.com.

Supporting Organizations

The Community Foundation provides cost-effective administration and support to four supporting organizations. These independent organizations work to fulfill their own missions with their own board of directors, bylaws, policies and financial statements.

- 4100 Charlestown, Inc.
- Jeffersonville Carnegie Library Foundation, Inc.
- New Albany Floyd County Education Foundation, Inc.
- OSI Foundation, Inc.



\$1,054,291
IN GRANTS AND
SCHOLARSHIPS
MADE
FROM
CFSI

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Youth Philanthropy Council

a program of Community Foundation of Southern Indiana

The Community Foundation's Youth Philanthropy Council (YPC) program is designed to encourage youth to give and serve in their communities, making philanthropy a habit for future generations. Annually, a new group of bright, energetic and engaged young leaders learn about philanthropy, complete community service projects, and award grants.

In addition to the \$9,500 awarded in grants to 10 organizations, in 2016 the YPC organized an effort to put Little Free Libraries in New Albany and Jeffersonville. The group partnered with the Arts Council of Southern Indiana, to ensure people throughout our community had access to books for all reading levels. The YPC raised money, collected books and added to our community's proud culture.

For more information about the Youth Philanthropy Council, visit cfsouthernindiana.com/ypc.





Phil and Sandy McCauley

2016
GRANTS
AWARDED
BY ALL
CFSI
FUNDHOLDERS:
\$785,154.19

A Lifetime of **GIVING**

"We believe in this community and we believe in giving back."

Phil and Sandy McCauley have lived in Southern Indiana for most of their lives. They've raised their children here, worked here, and offered their time and resources to help our community grow while strengthening our connections.

"We feel that we're the beneficiaries of living in a good community. We're all connected and giving back is our way of supporting a community that has provided so much to us."

Phil and Sandy volunteer and support a wide range of local nonprofits – Bliss House, Breakaway, CASA, St. Elizabeth's Catholic Charities, Home of the Innocents – just to name a few. A couple of years ago, Phil and Sandy decided to partner with the

Community Foundation of Southern Indiana to help facilitate their giving so they, as Phil put it, can continue "helping those who just need a fighting chance."

"We partnered with the Community Foundation because they could help us give in a different way. We weren't making a one-time gift, we made a gift that will continue having an impact on our favorite causes long after we're gone."

Like many of our other fundholders, Phil and Sandy were able to partner with the Community Foundation to establish a permanent fund that has simplified their giving and each year grants are made from their fund to support the causes that are important to them.

Using the Foundation to Accomplish Your CHARITABLE GOALS

Your Partner, Resource and Steward in Personal Philanthropy

For over 25 years, the Community Foundation of Southern Indiana has worked to create great communities in Southern Indiana by promoting and facilitating effective philanthropy. We have accomplished a great deal already, thanks to the generosity of donors who invest through the Community Foundation in their own personal philanthropic passions—whatever those might be—and by being good stewards of those philanthropic investments to build a permanent source of charitable funds for this community.

We work closely with individuals, businesses, non-profit agencies and families to create customized charitable funds that capture all of their philanthropic wishes. Our donors have established more than 240 separate charitable funds—either for the common good of Southern Indiana or for special interests of their own. The Community Foundation holds and invests these assets, and administers each fund in accordance with its donors' wishes, often in perpetuity. Our donors appreciate the flexibility, ease and cost-effectiveness of giving through the Community Foundation.

It is easy to donate to your favorite charitable causes through your own personalized fund at the Community Foundation. Just give us a call at (812) 948-4662 to get started.

Ways to Give

Each citizen in our community has unique interests and ideas for how to give back. Whatever your goals, whatever your means, whatever your passions, the Community Foundation can help you create a customized charitable fund to realize your dreams. Do you want to help students attend college? Would you like your children and grandchildren to one day help determine the charitable organizations that benefit from your fund? Are there specific non-profits—perhaps your alma mater or place of worship—that should always benefit from a fund you create? Is there a particular area of interest, such as children's health, the environment or education, that you would like your fund to always support? Or do you simply want to give back to your community and help address its greatest needs at any given time?

All of these goals are possible through a customized charitable fund created at the Community Foundation. If you can dream it, we can help you achieve it.

Permanent Endowment Funds

Donors who would like to create a permanent legacy for their charitable interests may establish an endowment fund. With endowment funds, principal is never spent. Instead, a portion of earnings becomes available each year, based on the Foundation's spending policy, for grants to the donor's specified charitable cause. Most endowment funds can be started with a minimum gift of \$15,000 (\$25,000 minimum to establish scholarship funds), and are a wonderful way to support your favorite organizations or interests, in your name, forever.

Pass Through Funds

Donors who want to streamline their current giving often establish a pass through fund at the Foundation. With an initial minimum gift of \$1,000, your fund may make grants of all or any part of the fund balance, at any time, to your favorite charitable causes. Many donors make additional contributions to their fund over time to sustain current giving. You keep track of only one tax receipt, but may make as many charitable gifts (minimum grant \$250) as you like from your single contribution. Pass through funds are an excellent way to take advantage of a windfall or bonus, or the need for an immediate income tax charitable deduction, and can help simplify your giving year-round.

CFSI RECEIVED
GIFTS FROM
220
DONORS
TO SUPPORT THEIR
FAVORITE
CHARITABLE CAUSES IN
2016

Why Give Through the Community Foundation



The chart below can help you decide if creating a fund at the Community Foundation is right for you.

We make your giving easy, flexible and meaningful. We take all of the administrative details, investment issues, reporting and regulatory requirements out of your hands. You simply decide the charitable purpose of your fund, and we do the rest. A single gift can create a fund that will further your personal giving goals in perpetuity.

Is a Fund at the Community Foundation Right For You?

WHAT IS YOUR GOAL?	TYPE OF FUND TO CONSIDER:
I currently support one or more charitable causes	You can create an endowment or pass through fund customized to fit your interests that will streamline and simplify all of your current giving—one gift, one tax receipt, and your one fund can benefit as many charities as you like.
I want to involve my children and my grandchildren in learning to give back	A family advised fund can provide the benefits of a private foundation without the hassles and expense, and can involve several generations of advisors to facilitate a family tradition of giving.
I know the particular charities that I always want to support	Your fund will send annual checks in your name to your selected charities.
I want to help students get an education	A scholarship fund can be customized to benefit students from a particular school, those studying a particular field, or whatever focus you choose.
I want to give back to my community	A Community Endowment fund in your name will support the community's needs now and in the future.
I want to leave a permanent legacy for my charitable interests	You can make a gift to the Community Foundation in your will or trust; we will work with you to create a customized endowment fund for the future that will benefit your favorite causes, in your name, forever.

Advisor Spotlight, Ed Reutebuch

"Every day brings its own unique set of challenges and opportunities," said Ed Reutebuch, senior vice president/client advisor with PNC Wealth Management. "But the thing I enjoy most is helping my clients – not just achieve their individual financial goals – but also personally, offering solutions that help them and often times their children."

Ed is a lifelong Hoosier and raised three children in Floyd County with his wife, Sally. He works with clients across Kentuckiana and through his work as a volunteer, understands the importance of giving back to our community, which is something he shares with his clients.

"It's been my experience that using the Community Foundation of Southern Indiana helps my clients achieve their philanthropic goals while simplifying the giving process," Ed said. "There aren't many organizations that operate with the same level of sophistication as CFSI. I can come to them with simple or more complex giving arrangements and know that Linda Speed and her staff will take great care of my clients."

Each day, the Community Foundation of Southern Indiana works with those who want to create a customized fund to achieve their charitable goals now, and those who want to leave a gift to a non-profit, school or church through their will or estate. Ed's clients, and all of the Community Foundation's fundholders, know that their fund will positively impact their favorite causes for generations to come.

"Whether you're an individual, business, family or professional advisor, using the Community Foundation of Southern Indiana as a giving tool is an excellent way to build your charitable legacy that is often times easier than a private trust. I see the valuable work they do in our community and I know that CFSI has the expertise and experience to accept a variety of assets that help my clients achieve their financial and charitable goals."



Sample Bequest Language

Language for IRA or insurance beneficiary designation

Beneficiary: The Community Foundation of Southern Indiana, Inc. (Tax ID # 35-1827813) for the _____ Fund.

Language for bequest

I give and bequeath _____ (describe gift) to The Community Foundation of Southern Indiana, of New Albany, Indiana, to be held as a component fund known as the "_____ Fund." This fund was separately created for the charitable purposes agreed to by me and The Community Foundation of Southern Indiana.

I'd like to know more

The Community Foundation of Southern Indiana is honored to be your partner in philanthropy. If you or your professional advisor would like to learn more about our giving options, please contact Linda Speed, J.D., President & CEO, at lspeed@cfsouthernindiana.com or (812) 948-4662. You may also visit our website at www.cfsouthernindiana.com.

Making Plans Now, For the Future

Bequest or beneficiary designation. Under these popular options — naming the Community Foundation in your will or trust or as a beneficiary on a life insurance policy or retirement account — you retain the use of your assets or property now while creating perpetual support for your favorite causes after your lifetime. You can change these plans until your death.

Charitable lead trust. This option allows you to create a trust to make annual income payments to the Foundation for several years to build your legacy fund. The balance of the trust is then distributed to your selected beneficiaries.

Give Now, Receive Income For Life

You can create your future legacy fund now by making a gift to the Foundation that provides income for you and/or others for life, then creates an endowment fund to fulfill your charitable objectives after your lifetime.

Charitable gift annuity. You receive a guaranteed, fixed annual payment for your lifetime in return for a present-day gift to the Foundation to create your future legacy fund. You may receive payments immediately or defer them into the future; for example, when you plan to retire.

Charitable remainder trust. You create a trust with your present-day or testamentary gift to the Foundation. The trust provides income to you and/or someone you name for life. Then, at the income beneficiary's death, the remainder of the trust creates your permanent legacy fund.

The Community Foundation of Southern Indiana does not provide tax, legal or financial advice. With any of these giving plans, there may be gift, estate or income tax implications, depending upon your personal financial situation. You should first consult with your tax, legal or financial advisor before making any charitable gift.

There are several ways to structure a legacy gift that allows you to create your future philanthropic plan now, while postponing the transfer of assets to the Community Foundation until after your lifetime.

The Legacy Society









The Community Foundation of Southern Indiana is privileged to honor those generous people who give back to our community—in their own individual ways—by making a gift in their estate plans. Those listed here have let the Foundation know they have created a future gift in their plans. In many cases, they have then worked with Foundation staff to establish a fund agreement to govern the use of their gift when the fund receives assets from their estate. As a result, these Legacy Society members are assured their wishes will be carried out by the Foundation in perpetuity.

- - Mr. Leslie D. Albro
 - Dr. Mark D. Allen
 - Mr. and Mrs. Gary T. Banet
 - Mr. and Mrs. John Barksdale
 - Mr. James H. Becker
 - Dr. Mathew and Mrs. Jessica Bergman
 - Joan M. Bland
 - Dr. Glen L. and Mrs MJ* Bonsett
 - Ms. Ruth Braeutigam*
 - Ms. Barbara Bunuan
 - Mr. and Mrs. David W. Case
 - Ms. Arletta Clements
 - Dr. Claudia Crump
 - Dr. Timothy M. Ruff & Ms. Laura Hansen Dean
 - Mr. and Mrs. Michael L. Douglas
 - Ms. Loretta Ellenbrand*
 - Dyan and Alan Feller
 - Mr. Jerry K. Finn
 - Mr. Darin Fox
- Dr. Fay Greckel
- Dr. Elsa M. Haddad
- Dr. and Mrs. James E. Hollenbeck
- Dr. and Mrs. Joe Jacobi
- Mrs. Wilma Howard Klein
- Mr. Henry J. (Hank)* and Mrs. Wilma Howard Klein
- Mr. Robert M. Knox*
- Mr. and Mrs. Robert L. Krall
- Mr. Norman Kratz*
- Mr. Casey and Mrs. Dora* LaDuke
- Mr. Ray Lewis
- Mr. Kevin and Mrs. Natalie Nolan
- Ms. Maggie Oster
- Dr. Malcolm and Mrs. Ruth Ann Peel
- Mr. and Mrs. Merrill G. Peter
- Mrs. Margaret Read
- Ms. Donna K. Riley
- - Ms. Edna Lucille Ross*
- Mr. S. Butch Shaw
- Shashi Shivananjaiah
- Mr. Gary L. Shourds and Dr. Rita Hudson Shourds
- Ms. Linda S. Speed
- Mrs. Alice L. Guthrie Steele
- Mr. Walt Stern, Jr.
- Ms. Mary and Mr. William* Thompson
- Mr. Michael D. Waiz
- Mr. and Mrs. Robert Walker
- Mr. and Mrs. James B. Wathen
- Mr. Laurence P. Wittlig*
- Anonymous Donors (9)
- * Legacy Fulfilled
- - NEW fund listing








2016 Financial Highlights

Total Assets as of December 31, 2016	\$ 102,223,210
Total Gifts in Calendar Year 2016	\$ 71,717,988
Total Number of Gifts	382
Total Grants in Calendar Year 2016	\$ 1,054,291

Endowed Funds – By Type












Planned Gift Funds	\$ 1,226,958	1%	
Field of Interest Funds	1,704,137	2%	
Agency Funds	1,762,218	2%	
Donor Advised Funds	5,771,328	6%	
Board Advised Funds	6,462,695	7%	
Scholarship Funds	9,967,247	10%	
Donor Designated Funds	71,701,106	73%	
Total Endowed Funds	\$98,595,689	100%	

Non-Endowed Funds – By Type

Planned Gift Funds	\$ 19,041	1%	
Agency Funds	7,547	1%	
Field of Interest Funds	67,252	4%	
Donor Designated Funds	83,287	6%	
Scholarship Funds	112,316	7%	
Donor Advised Funds	1,217,535	81%	
Total Non-Endowed Funds	\$ 1,506,977	100%	

Total Funds **\$ 100,102,666**

Grants by Purpose

Recreation	\$ 1,000	0%	
Environment	13,997	1%	
Youth Development	31,041	3%	
Religion	37,028	4%	
Community Development	51,234	5%	
Health	69,788	7%	
Arts and Culture	71,266	7%	
Human Services	198,792	19%	
Education	250,195	24%	
Scholarships	329,950	31%	
Total 2016 Grants	\$ 1,054,291	100%	

Board Advised / Unrestricted Funds

We would like to recognize the following donors who created funds within the Community Impact Fund, Operating Endowment, and Education Fund to help us support the programs of so many deserving not-for-profit organizations and people in our area.

Community Impact Fund

If you're interested in giving back to the community you call home, but don't have a specific cause in mind or want to provide flexibility to address future needs, your contribution to the Community Impact Fund will support the greatest needs of our community, now and forever. As our region's future needs and objectives may differ greatly from those in place today, establishing a fund within the unrestricted Community Impact Fund will provide important flexibility to future Foundation leaders, helping them address the evolving needs of our community. This is the easiest and most flexible type of fund for anyone who wants to give back to the community.

- Mr. and Mrs. Gary T. Banet Fund
- Phillip and Amy Beaman Fund
- Dr. Mathew and Mrs. Jessica Bergman Fund
- Kevin and Cindy Cecil Fund
- Judge J. Terrence Cody and Mrs. Peggy Cody Fund
- Patrick T. Cody Fund
- Shane Cody Fund
- Joyce and Don Day Fund
- Dr. Uric Dufrene Fund
- John and Barbara Geltmaker Fund
- German American Bank Fund
- Mr. and Mrs. Gary D. Gilmore Fund
- Mr. and Mrs. Christopher Gunther Fund
- Mr. and Mrs. Bill Hanson Fund
- Mr. and Mrs. Thomas Hardy Fund
- John and Martha Hartstern Family Fund
- Hazel and Walter T. Bales Foundation Fund
- H&H Design-Build Fund

Community Foundation Funds

The Community Foundation of Southern Indiana holds a number of board advised funds that provide important support for the Foundation and our community. These permanently endowed funds are an excellent and easy way to give back to your community while leaving a lasting legacy for future generations. With each of these funds – the Community Impact Fund, Community Foundation of Southern Indiana Education Fund, and Operating Endowment Fund – a minimum gift of \$1,000 creates your named fund. If you want to give back to the community you call home, while addressing the most pressing and evolving needs of our community, you can contribute to these funds which will benefit our entire service area.

- Horseshoe Foundation of Floyd County Fund
- Huffman Family Endowment Fund
- David C. and Rebekah Hussung Giving Fund
- Joe and Kathy Jacobi Fund
- Jacobi, Toombs & Lanz, Inc. Fund
- Mr. and Mrs. James P. Keith Fund
- Mr. and Mrs. Robert E. Kleehamer Fund
- Mr. and Mrs. Michael Larner Fund
- Leslie Lewis and Associates, LLC Fund
- Mr. Roger Maynard Fund
- Monroe Shine & Co., CPAs Fund
- Mr. J. Patrick More Fund
- Chuck and Valory Myers Fund
- Mr. and Mrs. R. Gregory Neely Fund
- Mr. Dale Orem Fund
- Mr. and Mrs. Dennis Ott Fund
- Paul Ogle Foundation Fund
- Mr. and Mrs. Larry Ricke Fund
- Ricke Family Fund
- Mr. and Mrs. Kyle R. Ridout Fund
- Honorable Carlton E. Sanders and Mrs. Sue Sanders Fund
- Mr. S. Butch Shaw Fund
- Mr. J. Robert Shine Fund
- Mr. and Mrs. Sam M. Shine Fund
- Mike and Susie Stewart Fund
- Tom and Linda Speed Fund
- Mr. and Mrs. Thomas Staley Fund
- Starlight Foundation, Inc. Fund
- Ms. Rebecca Taylor Thomas Fund
- TEG Architects, LLC Fund
- Mr. and Mrs. Michael D. Waiz Fund
- Ms. Melany Wessels Fund
- Mr. and Mrs. Anthony M. Zakrzewski Fund

Operating Endowment Fund

The Operating Endowment fund is a permanent fund that will forever help the Foundation carry out the vision of our donors and support the ongoing operations of the Foundation.

- Kevin and Cindy Cecil Fund
- Cody Family LLC Fund
- Mr. Patrick T. Cody Fund
- Mr. Shane Cody Fund
- Joe and Kathy Jacobi Fund
- Jacobi, Toombs and Lanz, Inc. Fund
- Mr. and Mrs. R. Gregory Neely Fund
- Duke Energy Foundation Fund
- Dr. and Mrs. Stephen Bodney Fund

Community Foundation of Southern Indiana Education Fund

The Education Fund provides scholarships to Southern Indiana students, with a preference for non-traditional students, over the age of 25, who have some college but no degree and are seeking to complete some form of post-secondary degree or credential that leads to a career.

- Blue Sky Foundation Fund
- Huffman Family Fund
- Indiana Retired Teachers Association - Southeast Division Fund
- Louise Ross Scholarship Fund
- Robert L. Holmes Educational Scholarship Fund
- Willie Bostick Institute Fund

CFSI Fund Listing

as of December 2016

**The Community Foundation
is here to support our
community and honor the
charitable intentions of the
donors who have entrusted
us to help them with their
charitable giving now and
after their lifetime.**

**In all, the Community
Foundation stewards over**

240

**individual funds, each
of which honors the
charitable intentions of the
person, family, business
or organization who
established the fund.**

Donor Designated Funds:

- Center for Cultural Resources at IUS Fund
- CFSI Pooled Donor Designated Endowment Fund
- Charles L. Shedd Fund
 - C.J. Smith, Jr. Memorial Endowment/ New Albany Deanery Youth Ministries Fund
 - Eugene and Marilyn Glick Foundation Fund
 - Larry Wittlig Endowment Fund
 - Marietta College Endowment Fund/ Larry Wittlig Scholarship Fund
- Children's Hospital Foundation Fund
- Clark County 4-H Foundation Fund
- Clark County Youth Philanthropy Council Fund
- Clarksville Community Schools Foundation Fund
- Douglas Family Fund
- Paris Group Fund
- - **Floyd County Fund**
 - Floyd County Youth Philanthropy Council Fund
 - Glen L. & M.J. Bonsett Memorial Endowment Fund
 - Harrison County Youth Philanthropy Council Fund
 - Ivy Tech Health Science Division Fund
 - James H. Becker 2015 Designated Fund
- - **James H. Becker 2016 Designated Fund**
 - Jeffersonville Evening Optimist Fund
 - Jeffersonville High School Bus Fund
 - Jeffersonville High School Locker Room Renovation Fund
 - Jeffersonville Iraq-Afghan Memorial Fund
 - John Woehrle Fund for Clark Memorial Hospital Foundation
 - Lynn Thomsen Memorial Fellowship Fund for the Mary Anderson Center
 - Monroe Shine Endowment Fund
 - New Albany High School Alumni Memorial Fund
 - Open Door Youth Services Fund
 - Personal Counseling Service Fund
- - **Phil and Sandy McCauley 2016 Designated Fund**
 - Phil and Sandy McCauley Charitable Fund
 - Ruth Braeutigam Fund A
 - Ruth Braeutigam Fund B
 - Ruth Braeutigam Fund C
 - Saint Meinrad Archabbey Endowment Fund
 - Town Clock Church Endowment Fund
 - Woehrle/Neidenberger Fund for St. Luke's United Church of Christ

Donor Advised Funds:

- - **Adam and Brittany Naville Charitable Fund**
 - Beaman Family Fund
 - Betty S. Shine Fund
 - Borden Lions Club Foundation Fund
 - Bryant Family Fund
 - Clarksville Parks Foundation Fund
 - David L. McCooe, Jr. Award Fund
 - Donna Riley and Joe Wayne Charitable Fund

- Eckart LLC Corporate Advised Fund
- The Garmon Family Fund
- Gary and Angie Banet Family Fund
- George N. and Beverly M. Lane Charitable Endowment Fund
- Howard Johnson III Memorial Fund
- James H. Becker Charitable Fund
- Joan M. Bland Charitable Fund
- The Joe and Kathy Jacobi Fund
- John and Shirley Woehrle Fund
- John Johnston Family Endowment Fund
- Keith and Laurie Pulliam Fund
- Kelsey Lynn Martin Memorial Advised Fund
- Kevin and Natalie Nolan Pass Through Fund
- Larner Family Fund
- Les & Virginia Albro Family Fund
- Matt and Jessica Bergman Fund
- Mike and Susie Stewart Community Enrichment Fund
- Monroe Shine & Co., CPAs Donor Advised Fund
- The Neely Family Fund
- The Neely-LaFollette Family Fund
- Ogle Foundation Fund
- Paula M. Robinson Advised Fund
- Rebecca Taylor Thomas Charitable Fund
- The Reinhardt Family Fund
- Rotary Club of Jeffersonville Endowment
- S. Butch Shaw Fund
- Schmitt Furniture Family Fund
- The Speed Family Fund
- United Charities/Washington C. DePauw Endowment Fund
- Warder Park Pass Through Fund
- Wellhouse Fund
- Woehrle Family Fund
- Wood-Carr Community Fund
- Wood-Carr Community Passthrough Fund
- York Academy of Discovery Fund
- Your Community Bank Charitable Foundation Advised Fund

Agency Funds:

- CFSI Pooled Agency Endowment Fund
- Arts Council of Southern Indiana Best of Show Award Fund
- Brooklawn Child and Family Services Endowment Fund
- Hope Southern Indiana Fund
- Junior Achievement of Kentuckiana Endowment Fund
- LifeSpan Resources Endowment Fund
- Lifespring Foundation of Indiana, Inc. Fund
- Providence Retirement Home Fund
- Supplies Over Seas Endowment Fund
- Childplace Endowment Fund
- City of Jeffersonville Beautification Fund
- Clark Memorial Hospital Foundation Fund
- Communities In Schools of Clark County Endowment Fund
- Communities In Schools of Clark County Passthrough Fund

- Council on Developmental Disabilities Fund
- The Falls of the Ohio Foundation Fund
- First Presbyterian Church, Jeffersonville Indiana Endowment Fund
- Floyd County Humane Society, Inc. of New Albany, Ind. Fund
- Friends of Nursing - Clark Memorial Hospital Fund
- Hispanic Connection of Southern Indiana Fund
- Home of the Innocents Endowment Fund
- Hosparus, Inc. Endowment Fund
- Howard Steamboat Museum Operating Endowment Fund
- IU Southeast Library Endowment Fund
- Sandra R. Patterson-Randles and R. Jeffrey Randles IUS Library Endowment Fund
- IUS/Floyd Memorial Foundation Health Careers Agency Fund
- Jeffersonville Township Public Library Endowment Fund
- Jewish Hospital and St. Mary's Foundation Fund
- New Chapel United Methodist Church Fund
- Park Memorial Endowment Fund
- Prevent Child Abuse of Clark and Floyd Counties Fund
- Robert E. Carter Society Fund
- Silver Heights Campground, Inc. Fund
- United Way of Clark County Endowment Fund
- United Way of Clark County Endowment Fund B
- United Way of Floyd County Fund
- West Clark Literacy Foundation Fund
- YMCA of Southern Indiana Fund

Field of Interest Funds:

- - **Charles and Frances Crawford and Beth - Ann Crawford Mosier Memorial Fund**
 - Charlestown Education Endowment Fund
 - Commerce America Foundation Fund
 - Community Foundation of Southern Indiana Disaster Relief Fund
 - Floyd County CAPE Endowment Fund
 - John and Shirley Woehrle Unrestricted Endowment Fund for Clark County
 - Norman E. and Katherine S. Pfau Endowment Fund
 - Parks and Recreation Foundation Endowment Fund
 - Parks and Recreation Foundation Fund
 - Silvercrest Endowment Fund
 - Silvercrest Grant Fund
 - VNASEI Endowment Fund
- - **West Clark Community Schools Education Foundation Endowment Fund**
 - Women's Foundation of Southern Indiana Fund
 - Women's Foundation of Southern Indiana Grant Fund
- - **NEW fund listing**

Scholarships

In 2016,
The Community
Foundation of Southern
Indiana distributed over
100 scholarship awards
with a combined
value of nearly
\$330,000.

THANK
YOU!

Scholarships offer students a sometimes life-changing opportunity to continue their education. Some students would not have pursued education beyond high school without these important scholarships and the generosity of our donors. Our thanks go to the following scholarship funds and their generous donors for their contributions to the educational attainment of the next generation of community leaders.

- 20 Under 40 Scholarship Fund
- Alexander Knox and Esther (Kahl) Knox Scholarship Fund
- Alice Ranck Hettle Scholarship Fund
- American Legion Bonnie Sloan Post 28 Fund
- Bette Bennett Hammond Memorial Scholarship Fund
- Charles and Dorothy Galligan Scholarship
- Claire Dufton "Freechild" Challenge Scholarship Fund
- Clarence R. Hay Memorial Scholarship Fund
- Cleo Fund
- Coach Alex Thom Scholarship Fund
- Community Foundation of Southern Indiana Education Fund
- Dr. Robert and Mrs. Zoe Hittner Scholarship Fund
- E. G. Read and Margaret Read Scholarship Fund
- Ed Adams Fund - Arts Council Southern Indiana
- Edward Endres Kiwanis Memorial Scholarship for Boys and Girls
- Ethan Bennett Memorial Scholarship Fund
- Evelyn Heiligenberg Scholarship Fund
- Fleshman Memorial Scholarship Fund
- Floyd Central Student Council/PTA Scholarship Fund
- Floyd Memorial Foundation/Ivy Tech Scholarship Fund
- Forrest McCaffry Scholarship Fund
- Hazel and Walter T. Bales Scholarship Fund
- Helen L. Siebert Scholarship Fund
- Highlanders' Memorial Scholarship Fund
- Hugh and Mabelle Scott Music Scholarship Fund
- In Name of Jesus Ministries Scholarship Fund
- Indiana University Southeast Chancellor's Scholarship
- IUS Paul Ogle Scholars Fund
- IUS Scholarship Fund/Community First Bank Fund
- IUS/Bayward and Mary Ann Cole Scholarship Fund
- IUS/Clark Memorial Hospital Foundation Endowment Fund
- IUS/Dr. Herb E. Smith Scholarship Fund
- IUS/Floyd Memorial Foundation Health Careers Scholarship Fund
- IUS/Harold Lacy Scholarship Fund
- IUS/John and Shirley Woehrle Scholarship Fund
- IUS/Phillip and Mary Louise Brown Scholarship Fund
- IUS/Roy Goode Memorial Scholarship
- IUS/Scott Memorial Hospital Endowment Fund
- Ivy Tech Scholarship Fund for Prosser School of Technology
- Ivy Tech/Clark Memorial Hospital Scholarship Fund
- Ivy Tech-Jesse Ballew Family Scholarship Fund
- Jean Sekora Hudson Educational Scholarship for Women
- Jefferson Masonic Lodge 104 William E. Falk Jr. Memorial Scholarship Fund
- Jeffersonville Jaycees Scholarship Fund
- JHS Class of 45, Inc. Fund
- John C. Gatz Memorial Scholarship Fund
- Kelsey Lynn Martin Memorial Scholarship Fund
- Kelsey Martin Memorial Tennis Tournament Scholarship Fund
- Kiwanis Scholarship Fund
- Lewis A. Endres Memorial Scholarship Fund
- Mark Bixler Memorial Scholarship Fund
- Martha Hartstern Nursing Scholarship Fund
- Marvin Wright Conservation Scholarship Fund
- Mattie Loughmiller Scholarship Fund
- The Melvin and Marjorie Garriott Scholarship Trust Fund
- Michael L. Becher Law Enforcement Scholarship Fund
- New Albany High School Pooled Field of Study Award Fund
- A. Fielder Myers Scholarship Fund
- American Heritage Scholarship Fund
- Gamma Chi Sorority Nursing Scholarship Fund
- M. Lucille Reisz Scholarship Fund
- New Albany PTA Scholarship Fund
- Scribner Family Endowment Scholarship Fund
- New Albany High School Scholarship Award Fund
- Alice L. Greene Scholarship Fund
- Joseph B. McClain Scholarship Fund
- Mark Douglas Scholarship Fund
- Wayne Gahlinger Memorial Scholarship Fund
- The Newman/Wittlig Endowed Scholarship Fund
- Norman Kratz Scholarship Fund
- Ottis & Lenora Wright Memorial Scholarship Fund
- Paul and Lois Holtman Memorial Scholarship Fund
- Paul Ogle Scholarship Fund
- Pearl Morris Nursing Scholarship Fund
- Pride of Galena Scholarship Fund
- Raymond Rhodes Memorial Scholarship Fund for the Graphic Arts
- - **Raymond Weatherholt Scholarship Fund**
- Reverend Farris and Dr. Ramona Clifton Scholarship Fund
- Robert E. Moser Agricultural Scholarship Fund
- Roland H. Money Scholarship Fund
- Samuel C. Robinson Scholarship Fund
- Shanda Sharer Scholarship Fund
- Sheila Bramlett Memorial Fund
- Steven Bailey Memorial Scholarship Fund
- The Susan Higdon Visual Arts Scholarship Fund
- Tim Brunmeier Memorial Fund
- Your Community Bank Charitable Foundation Scholarship Fund
- - **NEW fund listing**

Lilly Endowment Community Scholars

Four graduating seniors in Clark and Floyd counties were chosen from 218 applicants to receive full four-year scholarships from the Lilly Endowment, Inc. Community Scholars Program. To learn more about the Lilly Scholars, visit the scholarship section of our website.



Bayasa Batsaikhan
New Albany High School
Indiana University



Kelsey Johnson
Henryville High School
Indiana University Southeast



Grace Lowe
Jeffersonville High School
Butler University



Hannah Bailey
Community Montessori
Hanover College

Our Donors

We want to take a moment here to thank each of our supporters and donors. Throughout 2016, we received gifts from many people who support our vision and mission to build enduring charitable resources to positively impact our communities. Without your generosity the Community Foundation wouldn't be able to impact the lives of so many throughout this region. We were able to have a tremendous impact on our community last year and it would not have been possible without your support. Thank you.

- Advanced Payroll Systems, Inc.
- American Legion, Bonnie Sloan Post #28
- Mr. Keith R. Antz
- Mr. and Mrs. Gary L. Austin
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- Dave & Joy Creps
- Dr. Claudia Crump
- Joyce and Don Day
- Mr. and Ms. William E. Dehn
- Duke Energy Foundation
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- Ms. Bonita Embry Coots
- Ms. Marlene M. Embry
- Mr. and Mrs. Joseph Epperson
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- Ms. Mariane Fisher
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- Four-H Club Corp
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- Ms. Kathlyn Gary
- Mr. and Mrs. Christopher J. Gatz
- John and Barbara Geltmaker
- German American Bank

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- Joe and Melissa Glover
- Ms. Bonnie E. Graham
- Greater Clark County Schools Education Foundation
- Ms. Haylie Gregory
- Mr. and Mrs. Christopher Gunther
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- Ms. Leah Hamilton
- Mr. Gregory C. Hammond
- Mr. James M. Hammond, III
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- Mr. Robert Hammond
- Mr. and Mrs. Bill Hanson
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- Your Community Bank
- Ms. Abbie Zastawny
- Ms. Theresa K. Zoubul
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Members of the Board of Directors, left to right, standing: Larry Ricke, Lisa Brones Huber, Kyle Ridout, Jay Conner, Jessica Bergman, Julie Larner, Phillip Beaman, Linda Speed (ex-officio), Terrence Cody and Sue Sanders. Seated, left to right: R. Gregory Neely, David Hussung, Adam Naville, Gary Banet, Bill Hanson, Melissa Fry, Bill White. Not pictured: Catherine Sherrard

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.

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Linda Speed
President and CEO



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Grants and Scholarship Associate



Tamala Ponder
Administrative and Database Assistant

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The Community Foundation of Southern Indiana was founded in 1991 as the region's partner, resource and steward in philanthropy. The Foundation manages \$102 million in charitable assets and administers over 240 individual funds – each of which supports the unique charitable intent of the donor who established the fund. Annually, the Foundation awards millions in grants and scholarships to support our community and is a National Standards certified community foundation.





Community Foundation
of Southern Indiana
Partner. Resource. Steward.

4108 Charlestown Road, New Albany, Indiana, 47150
P: 812.948.4662
F: 812.948.4678
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