



Community Foundation  
of Southern Indiana

2019 | ANNUAL REPORT

# PATHWAYS TO PROGRESS

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.

# Thank You For Supporting Our Work and Inspiring Us To Make Southern Indiana The Best It Can Be

Southern Indiana is a growing and vibrant region. Surrounded by progress and pride, our community is coming together to create change that is luring new businesses and families. We're seeing investments that are bringing new amenities and improving the quality of the place we call home.

At the Community Foundation of Southern Indiana (CFSI), we're fortunate to be a part of this change. Each day we work with people who want our future to be as bright as our past. And, as this community's foundation, we're adapting to meet the ever-changing needs of our region.

In 2019, our board of directors began looking at ways that we could make a greater impact. Wondering how we could

leverage our grant dollars to create the greatest amount of change, we assessed where our community was already investing and used your input to determine our region's greatest needs. We then put together a plan that will shape our grantmaking in the coming years.

From a new grantmaking focus to important community leadership initiatives, your Community Foundation is doing everything we can to help move our community forward. And, with all of this momentum, we just want to say "thank you" for your continued support.

In addition to the exciting changes mentioned above, your dedication to our community and spirit of giving back has

In 2019, thanks to your support, CFSI has provided community leadership on important regional issues; made grants and scholarships that make this a better place to live, work and play; and acted as your philanthropic partner – connecting people to the causes they care most about.

\$5.2

MILLION  
IN GRANTS AND  
SCHOLARSHIPS

\$39

MILLION  
IN GRANTS  
SINCE  
1991

\$125

MILLION  
IN ASSETS

\$283

THOUSAND  
IN LILLY  
SCHOLARSHIPS  
AWARDED

\$2.6

MILLION FROM  
COMMUNITY IMPACT  
FUND SINCE  
1991

256

INDIVIDUAL  
FUNDS

\$390

THOUSAND IN  
SCHOLARSHIPS  
TO CLASS OF  
2019

61,000

PEOPLE HELPED  
THROUGH OUR  
GRANTS TO AREA  
NONPROFITS

\$5

MILLION IN  
FUNDHOLDER  
GRANTS

121

SCHOLARSHIPS  
AWARDED

made 2019 one of the most exciting and successful times in our 28-year history. We've grown from an organization with just a few funds and \$1 million in assets, to a foundation stewarding nearly 260 funds and \$125 million in charitable investments. But those are not the numbers that matter - what matters is what we do with the charitable dollars we've been entrusted with and that we're making a difference, as you'll see in this report.



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



**David Hussung**  
Chair, Board of Directors

We hope you enjoy learning more about CFSI through our annual report and encourage you to visit our website at [cfsouthernindiana.com](http://cfsouthernindiana.com) to read the full stories, see donor and fundholder listings and more.







2.6

# Community Grants Address Needs

## Miles of Smiles Mobile Dental Clinic



Each day low-income families and individuals in Southern Indiana go without many of the basic things that we all need to survive - access to stable housing, fresh food, and transportation to name a few. But many in our community also lack access to affordable, basic dental care.

The Community Foundation's unrestricted Community Impact Fund granted \$15,000 to Graceland Baptist Church for Miles of Smiles, a mobile dental clinic that provides no-cost and accessible, basic dental care to Southern Indiana residents. CFSI's grant was matched \$1 for \$1 by the VNASEI Endowment Fund, a permanent fund at the Foundation, which supports indigent health care in Clark, Scott, and Washington

Counties in Indiana. Thanks to their support, CFSI's initial grant grew to \$30,000 to assist with the annual operating cost for the Miles of Smiles van they use to reach low-income families and provide a service that many don't have access to.

Marty Baker, Administrator for Miles of Smiles said, "Many low-income residents don't have access to preventative dental care and are particularly vulnerable to health complications due to untreated tooth decay. The grant from the Community Foundation is helping us provide a valuable resource to our community, improving job prospects and quality of life for those served by boosting self-esteem and overall health."

Since 1991, CFSI has used our unrestricted Community Impact Fund to grant over \$2.6 million to organizations serving the residents of Clark and Floyd Counties.



In 2019, CFSI fundholders granted \$5 million to support the causes they care most about.

# Supporting The Community They Love

**Bob and Deena Kleehamer are as Southern Indiana as anyone. They are staples of the community who were born here, worked here, made a life and started a family here. This is a community they love and have helped develop through their time, leadership and generosity.**

Fueled by advice Bob's mother gave him at a young age, Bob and Deena have led a life of service. Bob said, "My mother told me that while we may not have a lot of money to help others in need, we do have time."

Over the years, Bob and Deena have been involved with countless organizations and, having given so much time and energy to their philanthropic passions, they turned to the Community

Foundation of Southern Indiana to see if they could simplify their giving in a meaningful and impactful way.

Like many of our fundholders, Bob and Deena were able to partner with CFSI to establish a fund that has simplified their giving. Annually, their fund supports the causes they care most about while continuing a family legacy of giving back to the community they love.

**"I have been involved with the Community Foundation for years and was aware of all the good they did in our community.**

**But what I didn't realize was how easy it could be to do our own charitable giving through the Foundation. Each year we are able to set a charitable budget and predesignate each of our contributions while the Community Foundation takes care of all the work."**







**"There is no better place to call home than Southern Indiana and no more important task than giving back to the community that has provided me and my family with so many opportunities."**





121

This past year, CFSI awarded  
121 scholarships.

# Scholar Stays Home and Makes a Difference

**Adam Naville, Senior Vice President, WesBanco**

Adam Naville and his wife Brittany were both born and raised in Southern Indiana. Growing up, he remembers his family talking about the importance of giving back and serving the community they have long called home. During his time as a student at Providence High School, Adam started down his own path of service as a member of the Community Foundation of Southern Indiana's Youth Philanthropy Council. And in 2003, Adam was selected to receive a Lilly Endowment Community Scholarship, a scholarship administered by the Community Foundation.

"Receiving the Lilly Endowment Community Scholarship created an

opportunity for me to continue my education and focus on the things that mattered most. It opened new doors and allowed me to pursue my bachelor's degree from Ball State University," Naville said. "That scholarship, and the degree it helped me earn, became the foundation of my career and helped put me in a position to succeed."

After receiving his bachelor's degree in economics and finance at Ball State University, Adam returned home to receive his Master of Business Administration degree from Indiana University Southeast and began his career at what is now WesBanco, where he is senior vice president and oversees commercial lending.

Today, Adam and Brittany are continuing the tradition of giving back and serving their community – acting as great examples to their three children. Over the years, Adam's service includes volunteering on numerous non-profit boards including the New Albany Deanery, Rotary Club of New Albany, Personal Counseling Services, St. Mary's of the Knobs School Commission, St. Elizabeth's Catholic Charities, Community Foundation of Southern Indiana, and Floyd County Head Start. In addition, Adam and Brittany have started their own charitable giving fund at the Community Foundation which is helping them give in meaningful and impactful ways.

# Scholarships

In 2019, CFSI distributed 117 scholarship awards with a combined value of over \$390,000! 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 236 applicants to receive a full four-year scholarship from the Lilly Endowment Community Scholarship Program, with a combined value of over \$283,000 awarded.



**Tomi Clark**

Jeffersonville High School



**Lucas Eichenberger**

Floyd Central High School



**Kami Geron**

New Albany High School



**Bethany Johnson**

Clarksville High School

61,000

Last year, our grants helped area nonprofits serve  
more than 61,000 people in our community.

# 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. It all starts with you and your passions and ideas for how you'd like to make this 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!



## Thank You!

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 61,000 people throughout Clark and Floyd Counties. Thank you for allowing us to be the partner, resource and steward for philanthropy in our community.

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





"The Community Foundation of Southern Indiana takes great care of my clients while helping me meet their charitable needs. The Foundation can provide advice and charitable solutions that simplify my clients' estate plans and helps their giving last for generations."



# Advisor Spotlight

**J. Scott Waters, Waters, Tyler, Hofmann & Scott, LLC**

"I really enjoy working with my clients and helping them accomplish their goals," said J. Scott Waters, IV, attorney with Waters, Tyler, Hofmann & Scott, LLC. "Each person who comes into my office has a different set of circumstances and objectives. And, like a puzzle, I find great joy in taking their individual pieces and putting the right ones together, in the right place, to bring their picture to life.

"Our community is growing, and we have great momentum going now. But if we want to continue our growth and we want to address our region's needs, we need to support causes that are making a difference

in Southern Indiana, which is why I recommend my clients work with the Community Foundation of Southern Indiana. Not only does the Community Foundation understand the needs of our community, but they understand the needs of my clients. Whether my clients want to support their alma mater, church or favorite nonprofit, or establish a scholarship or donor advised fund, the Community Foundation can help them do it in a meaningful and impactful way that is as unique as the person that fund represents."

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 nonprofit, school or church through their will or estate. Scott's clients and all of the Community Foundation's fundholders take comfort in knowing that their fund will positively impact their favorite causes for generations to come.



**256 individual funds.**

*Investments in areas that encourage people to get out into our public spaces lead to stronger social ties, increased civic engagement and better quality of life.*

**Dr. Melissa Fry**

*IUS Applied Research and Education Center*

# Building a Better Tomorrow

## Our Quality of Place Matters

Nestled along the Ohio River, Clark and Floyd Counties are steeped in tradition and provide residents a great quality of life – factors which are attracting new growth and opportunities as more businesses and families are calling Southern Indiana home. Capitalizing on this momentum, the Community Foundation of Southern Indiana is designating a portion of our grantmaking funds to pursue initiatives which will help improve our region's quality of place. Since 2018, to better align the Foundation's resources to the needs of our community, the Foundation's board of directors undertook a comprehensive review of our

grantmaking. That review, along with community input from the Foundation's updated community needs assessment, helped the board identify a glaring need in our community where we can make an impact that will alter Southern Indiana's landscape. Our Pathways to Progress Grants will prioritize projects that target people with the least access to safe, high-quality public spaces and amenities, especially those who have low incomes and/or who have limited transportation as well as people with physical and intellectual disabilities.

"Getting to this point has been a careful and intentional process. Our



board of directors takes seriously its responsibility to steward the funds we've been entrusted with and the important role those funds play in addressing local issues," said Linda Speed, president and CEO for the Community Foundation. She continued, "Determining the best way to transform our region through our grantmaking wasn't easy. But, after looking at the data, hearing from our community, and learning how increased accessibility to parks and trails would help connect our neighborhoods and improve our sense of community, we felt strongly that the ripple effects of focusing on this type of grantmaking could help transform our region."





**"There is tremendous progress being made toward improving our community and we're so excited to build upon that momentum by supporting important initiatives aimed at increasing accessibility and connectivity to parks, trails, and public spaces for our entire community."**

*Learn more about the Foundation's grantmaking at [www.cfsouthernindiana.com](http://www.cfsouthernindiana.com).*

# Community Leadership – Making An Impact Together

The Community Foundation of Southern Indiana believes in building partnerships that create impact for our community. By working together, we can accomplish so much more than we can by working alone. At CFSI, we provide leadership on important community issues – partnering with other organizations to create change and make a positive impact on our community.

**This past year, \$106,000 was awarded by Impact 100 to Home of the Innocents to support services for at-risk children and families in Southern Indiana.**



In 2017, the Women's Foundation of Southern Indiana, a fund of the Community Foundation, rebranded to Impact 100 Southern Indiana. Their goal is to find women passionate about their mission who, by working together, can fund significant grants to improve the lives of women and families in our community.

Since 2017, Impact 100 Southern Indiana has awarded more than \$250,000 in grants to fund significant projects at three local organizations.





Since 2016, the Community Foundation of Southern Indiana has supported the work of Align Southern Indiana (ASI) - helping launch the organization with the help of other regional community foundations and organizations - by providing office space, back-office support and more than \$140,000 in grants.

ASI is an umbrella organization working to facilitate a shared regional process that will align our resources, address our needs and produce sustainable solutions which will help our region become the best place to live, work and play. ASI is centered on five areas of focus: Economic & Talent Development, Education, Regional Leadership, Quality of Life and Quality of Place.

**This past year, ASI, with the help of every school superintendent in the five-county service area (Clark, Floyd, Harrison, Scott and Washington counties), defined for the first time what it is to be “kindergarten ready.” They collaboratively developed a kindergarten readiness screening packet for teachers, and are building a toolkit for parents, teachers, and daycare providers that includes simple instructional videos and lessons to help prepare preschoolers to enter kindergarten.**

Currently, ASI has four active teams working in the areas of 1) Kindergarten Readiness (Education), 2) Addiction Prevention (Quality of Life), 3) Trails (Quality of Place), 4) Regional Leadership and Talent Attraction (Talent/Economic Development). As the program grows, more teams will be added, aligning the right resources at the right time, working together to achieve agreed-upon community goals.

## KINDERGARTEN READINESS CHECKLIST

### General School Skills

- ☐ Controls feelings and behaviors
- ☐ Holds pencil correctly
- ☐ Holds scissors correctly
- ☐ Communicates needs and thoughts
- ☐ Follows rules and routines
- ☐ Follows directions (sits quietly, knows the meaning of “no”)
- ☐ Appropriately talks and communicates with others

### Math

- ☐ Recognizes basic shapes - circle, triangle, rectangle, square
- ☐ Can count from 0 to 9
- ☐ Can touch and count up to 9 objects
- ☐ Recognizes numbers 0 to 9

### Self Help Skills

- ☐ Dresses and undresses self independently
  - ☐ - Zipping and buttoning
  - ☐ - Uses toilet independently
- ☐ Appropriate use of toilet paper
- ☐ Wash hands
- ☐ Flushing

### Literacy

- ☐ Listens to a complete story
- ☐ Book handling
  - ☐ - Left to right - top to bottom
  - ☐ - Understands how to hold a book correctly and turn the pages
- ☐ Knows how to respond using at least 3 words
- ☐ Recognizes their name in print
- ☐ Can write their first name
- ☐ Recognition of letters by name (a-b-c)



# We Are a United Community

## Single Point of Entry System Brings Hope to Those In Need

Over the past several years, the Community Foundation of Southern Indiana has dreamed of bringing a single point of entry system to Southern Indiana that would connect people in need with the services provided by our region's nonprofit partners.

This past year, thanks in part to a grant opportunity from Lilly Endowment Inc., the Community Foundation of Southern Indiana – in partnership with Metro United Way and the Homeless Coalition of Southern Indiana – was able to bring United Community to Southern Indiana, a system recently implemented by Metro United Way for Louisville-based organizations.

United Community is a coordinated effort across our region to implement a data platform that links information across health, education and human services sectors, enabling referrals and coordination of services between agencies to meet every type of need. Multiple providers from across government, nonprofit and the private sector are coming together to provide wraparound supports for everyone

in our community who needs help. No matter where they start, United Community's robust community service coordination system will help them resolve their issues.

### United Community Goals

- Develop a connected, collaborative, community-wide system to coordinate care and services across sectors, and on both sides of the river, to address all social determinants of health/education, and offer real-time tracking and reporting.
- Measurably improve health, education and wellbeing outcomes by coordinating the delivery of health and social services among high needs children, individuals and families.
- Create a single point of entry system whereby individuals are channeled to appropriate services based on their unique needs across the health, education and social service sectors, including tracking of client outcomes after referrals to services are made.













# Our Community's Future

The Foundation's Youth Philanthropy Council (YPC) is a group of bright, energetic, next generation high school leaders who learn about philanthropy, complete community service projects and run a competitive grant cycle. The purpose of the Council is to encourage youth to give, serve in their communities and to make philanthropy a "habit of the heart." Since 2002, the YPC has awarded over \$130,000 from its endowment fund to area nonprofits to address the needs of our region's youth.

In addition to their annual grant cycle, in 2019, the Youth Philanthropy Council also took on a service project to provide toys and needed resources for Hope Southern Indiana's Spirit Live program.

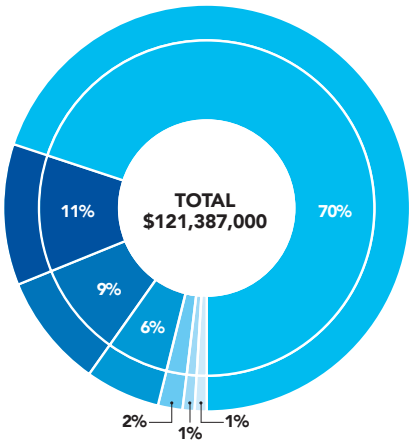
After hearing from clients that they had no gifts for their children to open on Christmas, Hope Southern Indiana started Spirit Live to bring the joy of Christmas into every home in our community. The program is a "store" that allows parents to pick out two toys for every child in their household, free of charge.

When members of the YPC learned about the program, they felt pulled to do something and make a difference. Members were then educated on how to fundraise and ask for donations which ultimately led to them gathering hundreds of dollars in cash and toys to support Hope Southern Indiana's Spirit Live efforts.

# 2019 Financial Highlights

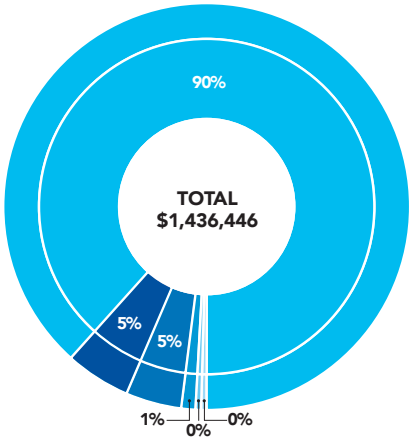
## Endowed Funds - By Type

70%	Donor Designated Funds \$ 85,184,736	2%	Field of Interest Funds \$ 2,227,338
11%	Scholarship Funds \$ 12,792,285	1%	Agency Funds \$ 1,952,084
9%	Board Advised Funds \$ 10,346,717	1%	Planned Gift Funds \$ 1,337,326
6%	Donor Advised Funds \$ 7,546,514		



## Non-Endowed Funds - By Type

90%	Donor Advised Funds \$ 1,285,926	1%	Planned Gift Funds \$ 7,616
5%	Field of Interest Funds \$ 67,511	0%	Agency Funds \$ 6,644
5%	Donor Designated Funds \$ 65,052	0%	Scholarship Funds \$ 3,697



## Total Assets \*

**\$124,817,636**

*\* As of December 31, 2019*

## Total Number of Gifts

**561**

## Total Gifts \*

**\$1,704,440**

*\* in calendar year 2019*

## Total All Funds

**\$122,823,446**

## Grants by Purpose - Donor Funds \*

Community Development	\$ 3,965,786
Religion	79,423
Health	37,817
Arts and Culture	43,941
Education	203,753
Human Services	190,975
Environment	6,698
Youth Development	123,700
Recreation	5,300
Scholarships	390,650

## Total Donor Fund Grants \$ 5,048,043

*\* Funds supporting individual donor interests*

## CFSI Community Impact Fund Grants \*

Community Development	\$ 52,520
Health	15,000
Arts and Culture	2,500
Education	3,100
Human Services	62,562
Environment	10,100
Youth Development	7,600

## Total Community Impact Fund Grants \$ 153,382

*\* Funds supporting community needs*

## Total All Grants \*

**\$5,201,425**

*\* in calendar year 2019*

# 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 effectively and efficiently to accomplish our vision and mission.

**Chair** – David Hussung  
**Vice Chair** – Lisa Brones Huber  
**Treasurer** – Adam Naville  
**Secretary** – Sharon Handy  
**Immediate Past-Chair** – Bill White



**Pictured, from left:** David Hussung, Amy Newbanks Letke, S. Butch Shaw, Melissa Fry, Bill White, Adam Naville, Larry Ricke, Lisa Brones Huber, J. Scott Waters, Sue Sanders, J. Terrence Cody, Bob Woosley, Jay Conner, Catherine Sherrard, Linda Speed, Laura Muncy, Barb Geltmaker

**Not Pictured:** Sharon Handy, Damon Massey.



# Staff



**Catherine Beechie**  
Administrative Assistant  
and Office Manager



**Margaret Brinkworth**  
Grants and Scholarship  
Associate



**Crystal Gunther**  
Director of Community  
Philanthropy



**Linda Speed**  
President and CEO



**Melany Wessels**  
Chief Financial Officer



**Kenton Wooden**  
Director of Community  
Outreach



Community Foundation  
of Southern Indiana

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



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



Excellence, Accountability, Impact.™

