

This has been an exciting year for the Community Foundation of Southern Indiana.

This has been a milestone year for the Community Foundation of Southern Indiana. We're celebrating 30 years of impact in our community – where we have grown from a Foundation with just a few charitable funds and \$1 million in charitable assets, to a true philanthropic partner in our region that now administers over 280 funds and \$164 million in assets. More importantly, we have granted over \$52 million to our community since 1991.

The Community Foundation of Southern Indiana exists to work with individual donors, families, and businesses to provide unique and customized giving options; to be a partner and resource for our area's professional advisors and nonprofit organizations; and to provide leadership on important community issues. As a result, our collection of individual donor funds provides grants to increase access

increase access to mental health services: to ensure access to art and cultural experiences across income levels; to build and attract living wage jobs. And on and on. Thirty years ago, the needs and priorities in our community and Floyd counties - and it's all possible because of a difference. Once you do, you can be confident the Community Foundation of Southern Indiana will still be here generations from now – creating positive change and impact for the betterment of all our residents.

We hope you enjoy learning more about CFSI through our annual report and encourage you to visit our website - www.CFSouthernIndiana.com - to read the full version of these stories and more!

In 2021, 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.

IN GRANTS AND **SCHOLARSHIPS**

NDIVIDUAL **FUNDS**

MILLION **IN COVID RELIEF FUNDS GRANTED OUT**

MILLION IN **FUNDHOLDER** GRANTS

MILLION **IN GRANTS** SINCE

SCHOLARSHIPS AWARDED

SCHOLARSHIPS TO CLASS OF

THOUSAND IN COMMUNITY IMPACT FUND GRANTS

IN ASSETS

HELPED THROUGH OUR **GRANTS TO AREA** NONPROFITS

March Handy like S. Soul Sharon L. Handy Chair, Board of Directors

AWARDED

IMPACT FUND SINCE

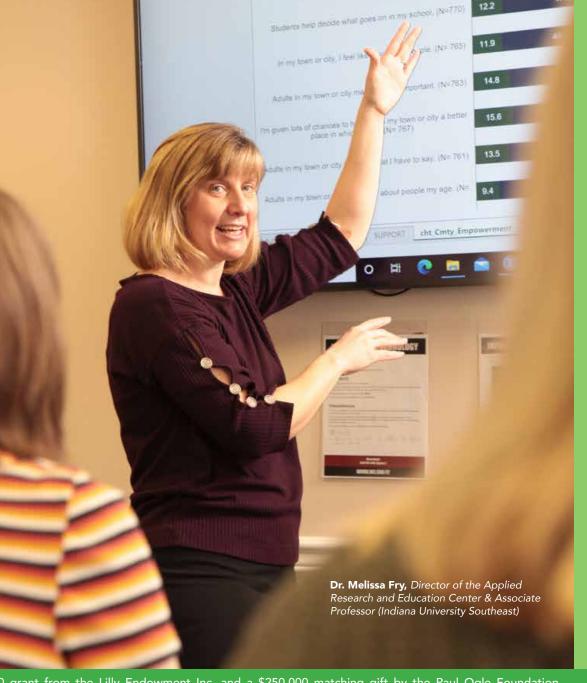


Linda S. Speed, J.D. President and CEO

TIMELINE: As we celebrate 30 years of giving back to the communities of Clark and Floyd Counties, the Community Foundation of Southern Indiana would like to take a moment to reflect on some of our organization's major accomplishments over the past three decades ...

"At its full potential, with investments in equitable systems and support for healthy and engaged families. Southern Indiana can be a home to a thriving and diverse economy, abundant in natural beauty, and buttressed by strong social connections. We can be a community of shared prosperity."

- Dr. Melissa Frv



in my family, I feel useful and important. (N=763)

Helping Understand **Our Community**

To learn more about the Community Needs Assessment, scan the QR Code or visit our website: CFSouthernIndiana.com.



Dr. Melissa Fry, Director of the Applied Research and Education Center & Associate Professor (Indiana University Southeast)

In 2015, the Community Foundation of Southern Indiana provided our community of Clark and Floyd counties with a groundbreaking new resource – the Assessment of Needs and Priorities in Clark and Floyd. The report, commissioned by the **Community Foundation of Southern** Indiana and produced by Dr. Melissa Fry and the Indiana University **Southeast Applied Research and Education Center, highlighted** our area's strengths, our greatest concerns, the highest priorities for improving our communities, as well as the gaps and overlaps in services and funding.

In 2021, that report was updated to include new information and data findings and continued to explore the region's aspirations for building on its assets to address the area's highest

The updated report, the Priorities for Progress: Assets and Aspirations in Southern Indiana 2021, proved to be predecessor. The report combined a detailed look at publicly available data with the perceptions of area residents and leaders to identify strategies to improve quality of life and quality of place in Clark and Floyd counties.

Overall, the Needs Assessment has allowed the Foundation to elevate its role as a leader in our area by bringing a collaborative regional focus to critical community problems recognize geographic boundaries.

The Priorities for Progress: Assets 2021 report is available to view or CFSouthernIndiana.com.

Thanks to a \$250,000 grant from the Lilly Endowment Inc. and a \$250,000 matching gift by the Paul Ogle Foundation, the Community Foundation of Southern Indiana began its legacy in our communities in 1991. Over the next four years,

the Community Foundation of Southern Indiana would grow to hold nearly \$7 million in assets, serving the counties of and would serve the counties of Clark, Floyd, Scott, Crawford, and Harrison.

1991-1995:

Improving Access to Public Spaces and Amenties

Quality of Place – Pathways to Progress

To residents, it will come as no surprise that Southern Indiana's amenities and great quality of life are attracting new growth and opportunities as more businesses and families are calling Clark and Floyd counties home.

To capitalize on this momentum, the Community Foundation of Southern Indiana is designating a portion of its annual grantmaking funds to Pathways to Progress Grants. This annual support will provide for initiatives aimed at improving our region's quality of place.

Pathways to Progress Grants will focus on projects designed to serve people with the least access to safe, high-quality public spaces and amenities, typically those who have barriers of some sort to full enjoyment of our public parks, venues, and amenities – whether that barrier is income; transportation or mobility challenges; or physical and/or mental differences. When our public spaces, venues and amenities are more open and welcoming to even our most vulnerable citizens, our communities are more welcoming and attractive to all residents, tourists, and employers, which attracts business and economic development.

For these most vulnerable populations, the Foundation will fund nonprofit initiatives designed to improve:

- Both real and perceived safety of existing amenities (greenspaces, parks, playgrounds, etc.)
- Safe and affordable access to the amenities (trails, public/shared transit, etc.)
- Environmental quality and sustainability of those amenities
- Use of the areas to increase physical activity which will improve health outcomes, such as obesity and other health risks

Scott Martin, executive director with River Heritage Conservancy said, "The spectacular natural places found in Southern Indiana defines our home community. We are so appreciative of the Community Foundation of Southern Indiana for investing in ways to make these special places more accessible and enjoyable for all."

A regular, annual grant cycle for Quality of Place, which awards grants up to \$150,000, opened July 1, 2021.



After moving into its new headquarters at One Commerce Square, the Foundation began its growth across our community.

The Lilly Endowment Community Scholarship started, giving Indiana high school students an opportunity for a free, four-year

tuition at any 4-year college or university in the state. By the end of the millennium, the Community Foundation of Southern Indiana had awarded over \$1 million in total grants to our community.

1996-200





Dr. Rex Bickers, CFSI Donor

Planting Seeds of Opportunity

Against a backdrop of flowers and nature, Brianna Christensen leads a class of eager young students at Waterfront Botanical Garden's Avish Estates in Louisville. A recent Floyd Central High School (FCHS) graduate, Brianna can share her passion for botany with students, thanks to an uncommon internship opportunity.



To learn more about Rex's Funds, scan the QR Code or visit our website at CFSouthernIndiana.com.



The organization that sponsors the internship varies from year-to-year, but one common denominator is that the internship, unlike so many others available, is paid - a rare perk for high schoolers. The funding comes from a Johnson III Memorial Fund, held at the Community Foundation of Southern Indiana. Dr. Rex Bickers, a retired physician and FCHS graduate, created the fund recently when he sought a unique way to honor Howard Johnson III, a classmate who was tragically killed in an automobile accident in

"The staff at the Community Foundation of Southern Indiana were patient in educating me on possible ways to carry out my intentions," expressed a wish that the fund would provide a paid internship, a learning opportunity in a real-world adult setting. It would not be tied to plans to go to college. They believed college was not the right answer for

The Community Foundation of Southern Indiana invests and administers the fund, ensuring the internship will endure forever. Thanks to Dr. Bickers' idea, the

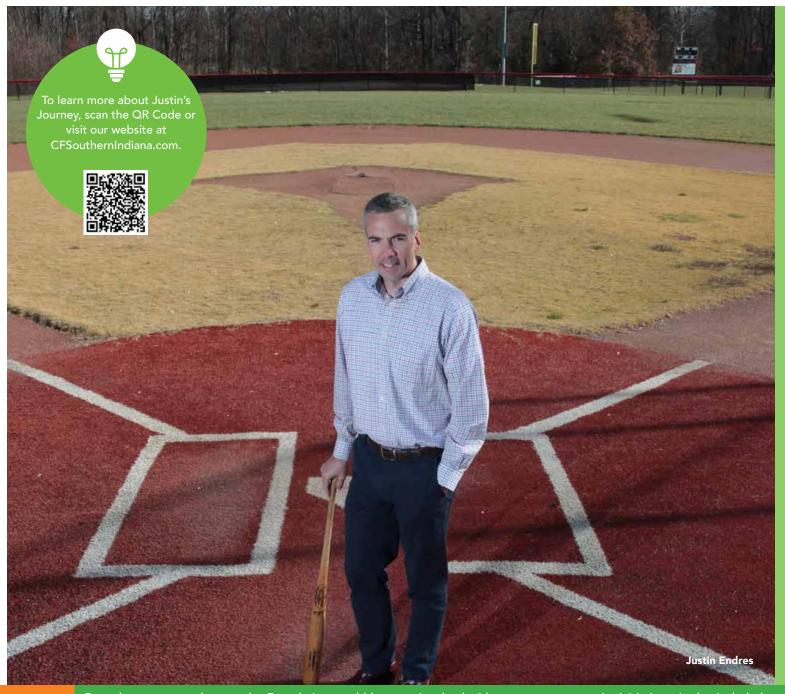
Howard Johnson III Memorial Fund internships to nonprofit organizations across Kentuckiana. Students like Christensen earn paid, on-the-job training in a future career field.

"This internship program has been nothing short of incredible, and the people I have worked with have been amazing," Christensen said. "When I leave for Indiana University in the Fall, Management. With this experience under my belt, I feel even more prepared thanks to everything I learned from my internship.

The Community Foundation of Southern Indiana expanded its reach in the early 2000's. The Youth Philanthropy Council celebrated its inaugural class, and four supporting organizations were formed under the Foundation's umbrella, while the

Community Foundation of Southern became the 7th largest of the 94 community foundations. By the end of 2005, the Community Foundation of Southern Indiana had more than \$28 million in total assets.

2001-2005



Advisor Spotlight

Justin Endres, Advisor & Attorney (Young, Lind, Endres & Kraft)

lived in the Windy City for a brief from the mecca of the baseball world: Wrigley Field, home of the Chicago Cubs. While it's a stretch from his Wrigleyville past, Justin is still playing our community in addition to his law

Working as the long-time President of New Albany Little League, Endres helped oversee the new baseball and softball complex in Kevin Hammersmith Memorial Park behind Northside Christian Church in New Albany. He also started the New Albany Track Club, which is a running

But while Justin is known locally for his community service record, his professional resume at Young, Lind,

Endres & Kraft (YLEK) is equally as impressive. Since 1968, YLEK has Floyd counties. During that time, the practice has become a trusted community partner that serves the individual needs of its clients.

After joining the firm in 2009, he has focused a large part of his civil legal practice on estate planning, real estate, and litigation. He has also participated in multiple cases before the U.S. Supreme Court during his

Justin recommends the Community Foundation of Southern Indiana to his charitable clients because the staff is "professional and knows what understands the goals of his clients and what they want to do, simply because they've done it before – for 30 years and counting.

"The Community Foundation of Southern Indiana provides a stable and reputable place for planning for the future," Endres said. "Small or large gifts, for people who want to have their gift last for generations, the Foundation provides that ease and knowledge base right here in the community to help people achieve their charitable goals."

Over the next several years, the Foundation would become involved with numerous community initiatives. It also included education-based initiatives, such as the Dictionary Project and Dolly Parton's Imagination Library, which were both established to help improve literacy rates in our region. Despite the stock market's decline from 2008-2010, the Community Foundation of Southern Indiana still held \$20.8 million in charitable assets.

2006-2010:

Community Leadership -Making An Impact Together

Now more than ever, the Community Foundation of Southern Indiana believes in building partnerships that create lasting impact for our communities. By working together, we can accomplish things that can only happen through the power of collaborative partnerships. We choose to partner with other organizations to create change, providing leadership on important community issues to make a positive impact on our region.



Impact 100 Southern Indiana empowers women to improve their lives by collectively funding significant grants that make a lasting

Southern Indiana has awarded more than past year, \$114,000 was awarded to the Family Scholar House for a 42-unit campus in Sellersburg, with a focus on single parents and young adults formerly in foster care.



organization designed to align all the resources of Clark, Floyd, Harrison, Scott and Washington Counties to address systemic Expert teams in the areas of Education, Leadership, Quality of Place and Quality of Life look for solutions to the root causes of problems that keep our region from reaching its full potential.

Our Community's Future

Youth Philanthropy Council

Since 2001, the Community Foundation of Southern Indiana's Youth Philanthropy Council (YPC) has encouraged area high school students to give back to their communities. By completing service projects and offering a competitive grant cycle to local nonprofit organizations that work with young people, these making philanthropy a habit for future generations.

The YPC has awarded \$148,843 in grants from its endowment fund to area nonprofits since 2002, with a focus on addressing the needs of our region's youth.

In addition to their annual grant cycle, the YPC conducted a "Warm Drive" that consisted of collecting coats, hats, to Hope Southern Indiana for its homeless outreach.



In 2012, the Community Foundation of Southern Indiana played an important role in the long-term recovery efforts following the March 2 tornadoes – which damaged Henryville and surrounding areas – granting over \$325,000 from

our Disaster Relief Fund. In 2015, the first Community Needs Assessment was produced. This comprehensive community study helped focus our grantmaking to directly address the greatest needs in our region as identified by our community and publicly available data ...

2011-2015:

United Community Changes Lives

United Community is a regional initiative that uses an innovative shared, virtual technology platform to provide wraparound services for residents in Clark and Floyd Counties. The virtual program easily refers and connects individuals to the local services they need in the community. Organizations can also track outcomes and measure the impact of the services they deliver.

Over the past 12 months, United Community has provided wraparound support to individuals struggling with everything help, the platform is also able to connect them with assistance for any other needs they have. In turn, these efforts have measurably improved health, education, and well-being outcomes among children, individuals, and families.

United Community is already making a difference for our residents, as shown here.

Family Health Centers of Southern Indiana, as told by Gracy Cortez

"We use the Ride United service of United Community primarily, transportation to and from their appointments. It is such a benefit to our patients to be able to offer rides for medical and dental appointments during COVID-19. Many were afraid to ride the bus, or did not have rides, and had conditions that could not be addressed through a tele-medicine visit. We helped patients get to dental appointments, which is great because they would have otherwise

their transportation barrier. When we can help our clients get to their appointments, it helps them stay compliant with their care, which is a plus for us and the patient!"

Southern Indiana Works, as told by Tony Waterson

"United Community provides the talent development system in Southern Indiana with an effective digital platform to connect, collaborate, and coordinate our regional services, allowing for a more customer centric and holistic **#3** Hope Southern Indiana, as told by Angie Graf

"Our client had COVID-19 prior to our assistance and was let go by his employer due to his time off with the virus. He had been working off and on but was having difficulty finding consistent work due to his Asperger Syndrome. Now, he has found Southern Indiana has helped him find financial and housing resources. United Community was a great support for him because he struggles socially. But the United Community platform allowed our client to work with only one case worker, who helped him apply through the system able to help him."



the Foundation used its COVID-19 Relief Fund to support local nonprofits and small businesses at the height of the crisis ...

In addition to partnering with Impact 100, Align Southern Indiana, and United Community, the Community Foundation of Southern Indiana focused on improving our region's quality of life, awarding its first Quality of Place - Pathways to

2016-2021:

Continued Support Remains a Priority

COVID-19 Relief Fund

For 30 years, the Community Foundation of Southern Indiana has provided funding to support nonprofit organizations across our region. So, when the world was disrupted by the COVID-19 pandemic, getting support to those who needed it most became the top priority.

As COVID-19 raged on, many individuals, families, small businesses, and nonprofit organizations found themselves in the virus's crosshairs. The pandemic temporarily shut down taking a toll on the U.S. labor market. Unemployment rates reached an alltime high, putting increased pressure provide for those in need. As needs spectrum, resources available for nonprofits were decreasing. From operational support to eviction assistance, from food insecurity to

cleaning supplies, local organizations needed help to provide basic necessities for those impacted. In early March 2020, the Community Foundation of Southern Indiana's COVID-19 Relief Fund was seeded with \$100,000 from the Foundation's own unrestricted Community Impact Fund, a permanent fund that is used by the Board of Directors to address the greatest needs and highest the Community Foundation of Southern Indiana was able to deploy more than \$1 million contributed by generous donors from all over the



To learn more about the COVID-19 Relief Fund, scan the QR Code or visit our website at CFSouthernIndiana.com

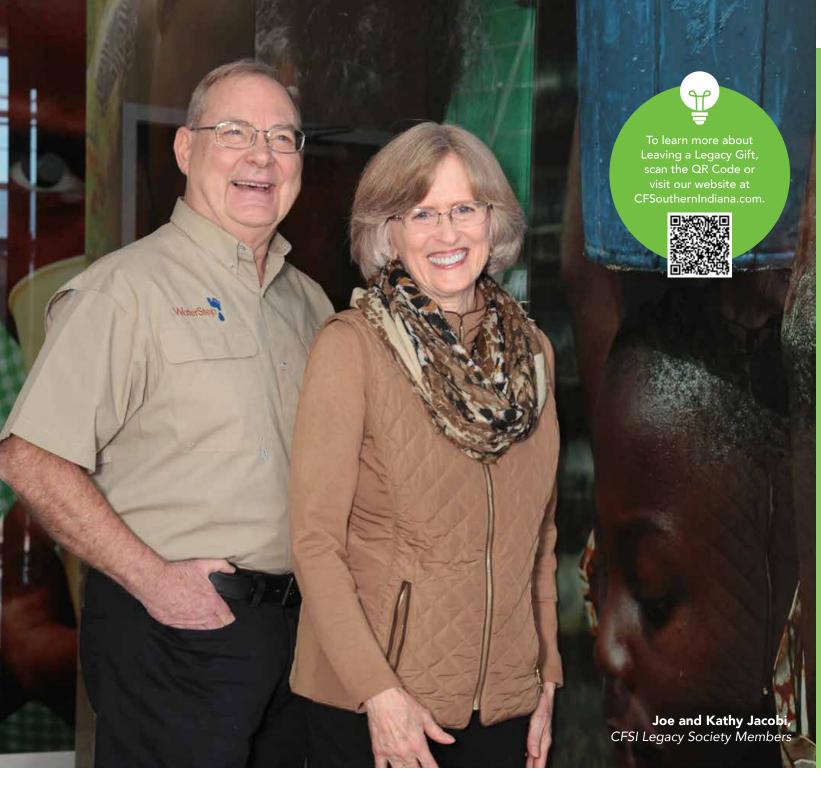


country to Southern Indiana small businesses and nonprofits.

100% of the COVID-19 Relief businesses keep their doors open and allowed our nonprofit partners to provide food, utility, and rent assistance, personal protective and more.



These last 30 years have reminded us that we have no idea what the future holds. As needs will continue to evolve over The Next 30 Years: the next three decades, remember that your Community Foundation will be here as a permanent resource to help our region address those needs because of your generosity. No matter what the future holds, you can count on the Community Foundation to continue to serve as the area's partner, resource, and steward in philanthropy - both for current and future generations.



Legacy Spotlight: A Lifetime Dedicated to Giving

Joe and Kathy Jacobi, CFSI Legacy Society Members

When Dr. Joe Jacobi was introduced to the Community Foundation of Southern Indiana at its inception in 1991, he was cautiously optimistic about what this type of charitable organization could mean for his home community. After all, he was no stranger to philanthropy and spent much of his life helping others - both in his community and abroad - and he could envision the impact of a local, permanent philanthropic resource right here in Southern Indiana.

Early on, Dr. Joe became involved with the Community Foundation of Southern Indiana, reviewing applications on both the Scholarship Advisory Board. Professionally, Dr. Joe also led a successful solo dental practice in Jeffersonville that spanned

In 1995, Dr. Joe met Kathy, whom he would marry in 2002. The couple moved to Kentucky, where Kathy worked for years as the Vice President and Chief Operating Officer of the Community Foundation of Louisville, and later as President of the Felix E. Martin, Jr. Foundation while Dr. Joe continued his practice in

After retiring from dentistry in 2011,

13 countries throughout Central and South America, the Caribbean, Africa, India, and the Philippines with Remote Area Medical to provide in developing countries, with Dr. Joe acting as the organization's Volunteer Director of Manufacturing since 2013.

Ultimately, the pair decided to take the next step in their financial involvement with the Community Foundation of Southern Indiana. Dr. Joe and Kathy decided that arranging for a Legacy gift through their estate plans to the Community Foundation Impact Fund would be a way to assure they would make a final gift to be used for the greatest needs and highest priorities of the community that was so instrumental in their life.

"We believe in the model and mission of community foundations, which is to carry on after you're no longer here. And that's a very important thing to only can benefit the nonprofits you are intimately involved with while you are alive, but to also provide funds for the flexibility of the changing needs of the future," Kathy said. "The needs of Southern Indiana are so different now than when the Foundation started in the 90s, and without the flexibility of unrestricted funds at the Community Foundation, there is no clear way to address that quickly. So ultimately, I think a Legacy gift is even more important than lifetime gifts."



Lilly Scholars-Where are They Now?

The Lilly Endowment Community Scholarship Program is designed to help raise the level of educational attainment in Indiana, increase awareness of the beneficial roles Indiana community



Adam Naville

Scholarship Awarded:

Current Job Title & Employer: WesBanco Bank Inc, SVP and Senior Commercial Banker

How Did the Foundation Help You in Your Educational Journey?

The Community Foundation of Southern Indiana was the foundation to my banking career, which has progressed as I have been involved in the community both personally and professionally. My friends today are in high school and after. I met my wife at Providence, but we were involved in the community through the New Albany Deanery. The Lilly Endowment Community Scholarship put me in a place for early success by graduating without any student debt, and I was involvement on their board. This has contributed to any and all success that I have had in my personal and professional life.



Joe Glover

Scholarship Awarded: 2003 Floyd County Lilly **Endowment Community**

Current Job Title & Employer:

Indiana University Southeast, Interim Vice Chancellor of Advancement, Alumni, & External Affairs

How Did the Foundation Help You in Your Educational Journey?

I can honestly say that I would not be where I am today without the Community Foundation of Southern Indiana and the Lilly Endowment Community Scholarship program. Aside from the obvious financial support, I also received guidance, mentoring, and friendships that persist today. The Community Foundation of Southern Indiana and its employees (past and present) will always be like family to me. They gave me a chance and an opportunity that I am thankful for every day. I want to think that I would have still but if I am being sincere, I think my life would look a lot



To learn more about former Lilly Scholars, scan the QR Code or visit our website at CFSouthernIndiana.com.





Emily Madley

Scholarship Awarded: 2011 Clark County Lilly

Current Job Title & Employer: RN at Baptist Health Louisville and RN at **UofL Health-Jewish Hospital**

How Did the Foundation Help You in Your **Educational Journey?**

going to nursing school due to some extenuating circumstances my senior year of high school. Without the Community Foundation of Southern Indiana and the Lilly Endowment Community Scholarship, I would not have had the privilege to care for the hundreds of Kentuckiana community members over the last sixand-a-half years. My degree is one that continually challenges me, provides me

Giving Back

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, favorite nonprofit, 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 of Southern Indiana will help make your giving easy, flexible, and meaningful. We'll work with you 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 ideas for how you'd like to make this world a better place. We can help start the conversation about your charitable vision.

Legacy Funds

- Donor Advised Funds
- Community Impact Charitable Checking Funds Accounts
- Scholarship Funds
- ... and many more options.

To our community, donors, fundholders and Legacy Society members, we say thank you for helping us make a difference in Southern Indiana for three decades. 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 us reach over 100,000 people throughout Clark and Floyd counties. Thank you for allowing us to be the partner, resource, and steward for philanthropy in our community.



2021 Financial Highlights

Endowed Funds - By Type

Donor Designated Funds \$ 108,348,579

Scholarship Funds \$ 17,732,120

Board Advised Funds \$ 13,589,191

> Donor Advised Funds \$ 9,688,417

Field of Interest Funds \$ 2,730,388

Agency Funds \$ 2,529,484

Planned Gift Funds \$ 1,583,252



TOTAL

\$156,201,431

Total Assets *

\$159,961,547

* As of December 31, 2021

Total Number of Gifts

487

Total Gifts *

\$1,146,169

* in calendar year 2021

Total All Funds

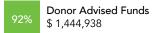
Total All Grants *

* in calendar year 2021

\$157,780,160

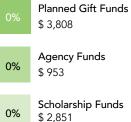
\$5,982,594

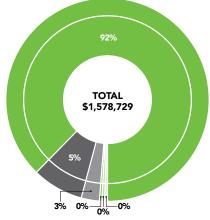
Non-Endowed Funds - By Type



Field of Interest Funds \$ 75,677

Donor Designated Funds \$ 50,502





Grants by Purpose - Donor Funds *

Community Development	\$ 4,218,699
Religion	106,739
Health	67,534
Arts and Culture	19,285
Education	402,170
Human Services	269,212
Environment	6,000
Youth Development	27,647
Recreation	6,200
Scholarships	456,825

Total Donor Fund Grants \$ 5,580,311

* Funds supporting individual donor interests

CFSI Community Impact Fund Grants *

Community Development	\$ 207,670
Religion	0
Health	23,847
Arts and Culture	9,996
Education	85,250
Human Services	72,020
Environment	0
Youth Development	3,500
Recreation	0
Scholarships	0

Total Community Impact Fund Grants \$ 402,283

* Funds supporting community needs

Board of Directors

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

Chair - Sharon Handy **Vice Chair** – Damon Massey **Treasurer** – Adam Naville **Secretary** – S. Butch Shaw **Immediate Past-Chair** – Lisa Brones Huber







































Lisa Brones Huber, Immediate Past-Chair, Rich Boling, Jessica Carroll, Jay Conner

Pictured, from left (middle): Angie Fenton, Dr. Melissa Fry, Mike Johnson, Greg Nash, Amy Newbanks Letke, Keith Pulliam, Larry Ricke,

Pictured, from left (bottom): J. Scott Waters, Bob Woosley, Linda Speed, President and CEO, ex-officio

Staff



Linda Speed



Melany Wessels Chief Financial Officer



Crystal Gunther



Melanie Douglas Asset Development Manager



Wes Scott



Kelsey Eilers Lynn **Donor Services Specialist**





Margaret Brinkworth Grants and Scholarship



Community Foundation of Southern Indiana











