

About the

Community Foundation of St. Joseph County

The Community Foundation of St. Joseph County connects people who care with causes that matter. We're a charitable endowment with assets of over \$100 million, and, since we began in 1992, we've returned approximately \$50 million in grants to support local nonprofits and the good work they do.

With initiatives that focus on strengthening early childhood education, helping our elderly citizens stay in their homes longer, creating opportunities for African Americans, building our community's arts and culture resources, and supporting our local parks, the Community Foundation enriches life in St. Joseph County for every one of us—permanently. Learn more about what we do here at the Community Foundation and how you can become a part of building the future of our St. Joseph County at www.cfsjc.org.



A teacher and student with Reins of Life, a local nonprofit therapeutic horseback riding program that has an endowed agency fund with the Community Foundation.



A Head Start classroom at Elsie Rogers in Mishawaka, one of the many that the Community Foundation's Early Years Count Education initiative has helped to turn into a rich, child-centered learning environment.

Strengthening Community Through Partnership

If asked to describe 2009 in a single word, I would have to say "unforgettable." This was a year that will pop off the page in the history books. But it would be a mistake to remember the past year just in terms of bad news, volatile stock markets, and rising unemployment.

For the Community Foundation, the past year brought the power of partnerships to new heights. The Community Foundation's best achievements to date could never have been accomplished alone. Instead we look for strong partners with whom we can develop excellent ideas backed by the competence to implement them, and we look to the generosity of donors,

foundations, and other funding sources to bring new initiatives to life.

We trust that as the Community Foundation demonstrates our impact, more people will choose to give to the Community Foundation, increasing our resources and allowing us to dream on an even larger scale.

Thanks to this powerful combination of great ideas, competence, and resources, the last year can also be remembered for many wonderful achievements accomplished through partnership:

- Steady improvement in the quality of early childhood education at **Head Start**


continued on page 2

continued from page 1

- and centers throughout our community;
- New help for family, friends, and caregivers of frail and disabled seniors through the *Caregiver Connection* program launched with **REAL Services** and **Memorial Home Care**;
- Stronger leadership and relationships among local nonprofit executives through an intensive Nonprofit Executive Leadership program conducted with **Notre Dame's Mendoza College of Business**;
- a beautiful new performing arts pavilion at Potawatomi Park through a collaboration with the **Rotary Club of South Bend** and the **South Bend Parks and Recreation Department**;
- a stunning exhibition of sculptures and art by world-renowned artist (and South Bend native) George Rickey through a collaboration with the **South Bend Museum of Art** and the **Snite Museum of Art**;
- a scholarship program to honor the memory and example of the legendary Charles Martin, Sr., through a collaboration with his friends, colleagues, and former students.

All of these achievements were made possible by the dedication of the individuals involved and the generosity of local donors. Please take a few minutes to read on and learn more about the partnerships that provided so many good things to remember about 2009. And read a little further still to find out how you can be our partner.

Best regards and best wishes for an uplifting (and perhaps slightly less memorable) new year,



Rose Meissner, President
Community Foundation of St Joseph
County



40 nonprofit executives participated in the Foundation's new Nonprofit Executive Leadership program.

Building the Capacity of Our Community's Nonprofits

At the Community Foundation, we work very closely with our local nonprofit organizations. We know firsthand what outstanding services they provide, and it's part of our mission to help them become even stronger.

One way we do that is through our Leighton Award for Nonprofit Excellence. Each year since 2000, we've recognized one of our community's best nonprofit organizations with a \$100,000 endowment challenge grant, the largest of its kind in the country. The list of past Leighton Award winners reads like a *Who's Who* of local nonprofits: **LOGAN, Center for the Homeless, REAL Services, and South Bend Civic Theatre**, for example. This year, the **Women's Care Center**, under the leadership of President Ann Manion, won the eleventh annual Leighton Award in recognition of the caring, supportive services the Center provides to young women facing difficult circumstances. The Community Foundation also named two 2010 Special Recognition winners: **Family & Children's Center** and the **Center for History**, each of which received an award of \$10,000.

This past year, we partnered with the **University of Notre Dame's Mendoza College of Business** to conduct a new program to build nonprofit capacity—the Nonprofit Executive Leadership program (NELP). NELP brought in national experts to present sessions on financial vitality, leadership, management, and governance to 40 top-level executives from our local nonprofits. The program's approach emphasized practical, "in the trenches" learning, providing nonprofit leaders with the tools they need to strengthen their organizations in the face of the economic challenges of the past two years.

Participant response to the program was very positive. Susan Warner, Executive Director of the **Public Education Foundation, Inc.**, and an NELP graduate, said, "I appreciate the quality of the speakers, hands-on presentations, and the opportunity to learn from and interact with my fellow nonprofit executives."

We know that outstanding nonprofits are a critical part of a healthy, vibrant community, and we're committed to helping them succeed in every way we can.

New Chris Wilson Pavilion Crowns Potawatomi Project

Potawatomi Park, the city's most popular park complex, draws some 500,000 visitors a year—and now that the “Fun for All” project is complete, that number will grow even larger.

“Fun for All” began in 2007 when the Community Foundation received a major Access to Recreation grant from the W.K. Kellogg Foundation. The grant allowed us to collaborate with the **South Bend Parks and Recreation Department** on the \$1.1 million “Fun for All” project, which made the park more accessible to the entire community by creating an exercise path through the park's picnic area, building a universally accessible playground at the park's center, and creating an endowment to promote and sustain universal accessibility in local parks in the future.

Thanks to great leadership from the **Rotary Club of South Bend**, the final phase of the project was completed this September with the grand opening of the Chris Wilson Pavilion at Potawatomi Park. Funded by the Community Foundation's ArtsEverywhere Initiative, the family of Christopher H.

Wilson, private trusts at Wells Fargo Bank, and the Rotary Club, this beautiful new performing arts venue will accommodate a wide range of music, dance, and theater. A considerable improvement over the park's old bandshell, the Chris Wilson Pavilion is significantly larger—the new stage can seat a 50-member symphony, as the **South Bend Symphony Orchestra** demonstrated with its performance at the pavilion's dedication—faces north, and has optimized acoustics, an enlarged backstage, and improved, universally accessible seating.

The Rotary Club's involvement included project coordination, financial support, and hands-on work, a trademark combination for the organization, which has a long history with Potawatomi Park.

The Parks and Recreation Department is working with the Community Foundation and local arts organizations to plan an inaugural series of performances for 2010, expanding and diversifying current offerings while continuing to maintain its focus on free, family-friendly entertainment.



Congratulations to the Women's Care Center, the winners of the Community Foundation's 2010 Leighton Award for Nonprofit Excellence. From left, Jim Keenan, Leighton Award Committee member; Bobby Williams, Director, Women's Care Center Foundation; Ann Manion, President, Women's Care Center; Rose Meissner, President, Community Foundation of St. Joseph County



The South Bend Symphony Orchestra performs at the dedication of the new Chris Wilson Pavilion.

2009 HIGHLIGHTS

- Despite the economic challenges of the past year, the Community Foundation's assets remain at over \$100 million, making it one of the top 100 community foundations in the country and the second largest in the state
- The Community Foundation awarded almost \$5 million in grants in 2009, including \$1.4 million in support of programs in youth and education, and \$2 million in health and human services
- Cumulatively, the Foundation has awarded just short of \$50 million in grants since it began grantmaking in 1992
- 17 new funds were created at the Foundation in 2009, bringing the total number of funds to 425
- The Foundation awarded \$450,000 in scholarships in 2009, including funding for the new Laidig Community Service scholarship and the Charles Martin “Touch a Life” scholarship

How Can You Partner With the Community Foundation?

Now that you've read a little about how partnerships are changing our community for the better, we'd like to invite you to partner with the Community Foundation to create your *own* legacy.

On these two pages, you'll find a wealth of information about the many ways you can do that. You can contribute to an existing agency endowment, create a gift annuity, support a specific Foundation initiative—such as the ArtsEverywhere initiative or the Early Years Count Education initiative—or you can start your own fund.

When you start your own fund, you name your fund, contribute to it, and shape it to serve whatever causes are most dear to you: a specific charity, a field of charitable endeavor, or the community at large. Then your fund, like many others, will be here to benefit our community forever.

Using the Community Foundation's

standard fund agreement, you can create a fund in a single visit. Rose Meissner, Community Foundation President, will work with you to shape the agreement to reflect how you want the fund named, your charitable intentions, the extent of involvement you desire in the grant-making process, and other issues important to you. A minimum fund goal of \$10,000 is required (\$25,000 for organizations), contributed at once or over a period of time.

A variety of tax-effective gift opportunities are available that can maximize the power (and reduce the cost) of the legacy you create. The Foundation provides free information to individuals and their advisors on effective gift planning.

Partner with us, and change your community's future. Call Rose Meissner at the Community Foundation for more information at (574) 232-0041, or visit us online at www.cfsjc.org.

A Surprise Gift for LOGAN



LOGAN serves hundreds of children and adults in our community with disabilities.

For LOGAN, an unexpected bequest brought some good news that will continue to make a difference long into the future.

The Bernat family lived in our community for many years. Steven Bernat, who never married, was the last surviving member of his immediate family.

"He wanted to keep the benefits of his family's money in the community," explained Mr. Bernat's attorney, Bill Farabaugh, "so he decided to leave his estate to the Community Foundation of St. Joseph County."

Mr. Bernat selected the LOGAN Fund to receive his bequest. Thanks to Mr. Bernat's thoughtful generosity, LOGAN's important work on behalf of people with disabilities in our community will receive much needed additional support every year through this endowment.

How You Can Maximize Year-End Giving

As the end of the year approaches, consider these six savvy ideas for getting the biggest benefits from your charitable giving.

1. *Make a gift of cash (by check or online, by credit card) to a Community Foundation endowment fund.* For a list of endowed funds, see "Endowments for Local Agencies," right. The earnings from your gift will benefit your favorite cause or charity forever, making the future of our community a little more secure. All contributions are tax deductible.
2. *Make a gift of appreciated stock to a Community Foundation endowment fund.* You'll not only receive a charitable income tax deduction, you'll also avoid capital gains tax. Some donors use appreciated stock to make their year-end gifts, and use the cash they didn't give away to buy back the same stock at a higher cost basis. It's a great way to minimize capital gains taxes.
3. *Set up a charitable gift annuity.* See "Earn Income, Benefit Others," right.
4. *If you're 70½ or older, you can make a gift directly from your IRA plan to any public charity (excluding donor-advised funds).* If the gift is made directly to the charity, it won't be included in the donor's income. Because the gift is from an IRA, though, it's not tax deductible.
5. *Name the Community Foundation to receive a gift from your IRA upon death.* Because these assets are subject to income tax, they're the best dollars to give away. You can do this by contacting your plan administrator.
6. *Name the Community Foundation in your will.* You can make a bequest to set up a fund in your family name to benefit a favorite cause or charity forever, or make a bequest to an existing fund—see "A Surprise Gift for LOGAN," left.



Earn Income, Benefit Others

If you're a member of what anchorman Tom Brokaw calls the "Greatest Generation," you know something about weathering hard times. You know the value of work, perseverance, and planning, and you want to pass those values onto your grandchildren.

In uncertain economic times, gift annuities can be attractive investment options. A gift annuity provides you with regular income and reduced taxes during your lifetime, and the assets that remain after your death will continue to benefit your community forever.

How does it work? You create a gift annuity through a gift of cash or stock to the Community Foundation of St. Joseph County. In exchange, we pay you a fixed, guaranteed percentage of that gift as income for the rest of your life.

You'll receive a tax deduction for the charitable portion of your gift, and the income that your gift annuity generates is partially tax-free. When you die, we place the remaining assets in a permanent fund to benefit the local charity or cause of your choice.

For more detailed information and current rates, contact Community Foundation President Rose Meissner at (574) 232-0041, or create a free customized illustration online at www.cfsjc.org—to learn how a gift annuity might work for you.

ENDOWMENTS FOR LOCAL AGENCIES

Did you know that you can give to your favorite charity through the Community Foundation? When you do, you amplify your gift with the Foundation's investment management services and the power of permanent endowment: Your gift will continue to benefit the organization forever.

Chances are, your favorite charity has an endowed fund with the Community Foundation. Check the list below or review it online at www.cfsjc.org.

- Bethel College
- Boy Scouts of America—LaSalle Council
- Boys & Girls Club
- South Bend Symphony
- LOGAN
- Camp Eberhart
- Center for the Homeless
- Center for Hospice and Palliative Care
- Covenant Christian School
- Family & Children's Center
- Fischhoff National Chamber Music Association
- Food Bank of Northern Indiana
- Founder's Guild
- Goodwill Industries of Michiana
- Hannah Lindahl Children's Museum
- Holy Cross Village
- Hope Ministries
- IUSB
- Junior League of South Bend
- Leadership South Bend/Mishawaka
- Life Treatment Centers
- Literacy Council of St. Joseph County
- Mishawaka Education Foundation
- Montessori Academy at Edison Lakes
- Penn/Harris/Madison Educational Foundation
- Potawatomi Zoological Society
- Preservation of the Res
- Public Education Foundation
- Ray Bird Ministries
- REAL Services
- Rebuilding Together
- Reins of Life
- Saint Mary's College
- Sister Maura Brannick Health Center
- South Bend Civic Theatre
- South Bend Heritage Foundation
- South Bend Regional Museum of Art
- Southold Dance Theater
- St. Joseph County Public Library
- St. Joseph's High School
- St. Margaret's House
- St. Paul's Retirement Community
- Trinity Schools
- United Way of St. Joseph County
- Women's Care Center
- YMCA of Michiana
- Youth Leadership South Bend/Mishawaka
- Youth Service Bureau of St. Joseph County
- YWCA of St. Joseph County



REAL Services volunteers work with our community's elderly to improve their day-to-day quality of life.

REAL Services/CFSJC Partnership Wins National Grant To Benefit Caregivers

Across the board, the vast majority of older adults in our community say that they want to stay in their own homes as long as they can. One way that the Community Foundation helps make this possible is by supporting the family members, friends, and neighbors who care for the elderly. And now we have new resources to help us do that. Out of more than 400 applicants from across the country, **REAL Services** and the Community Foundation earned one of 14 grants awarded by the Harry and Jeanette Weinberg Foundation, Inc. The grant—the largest of the 14 awarded—will fund *Caregiver Connection*, a multifaceted program that supports those who care for aging relatives, friends, and neighbors. The \$780,000 grant calls for about \$600,000 in matching funds, creating total resources of more than \$1.3 million over three years.

Caregiver Connection focuses on the 1,000 or so caregivers in the 46619 ZIP code, building on several successful pilot programs that REAL Services had

developed with Community Foundation support over the past few years. REAL Services has hired Gloria Buckhanon as full-time Aging and Caregiving Facilitator to coordinate this effort. Buckhanon, whose office is located in the Ellison Residence at the heart of the 46619 neighborhood, will work one-on-one to connect caregivers with available resources. Buckhanon is supported by another new REAL Services staff member, Martha Knepper. Through *Caregiver Connection*, all caretakers in the 46619 ZIP code will have access to a specially tailored five-session training program offered in collaboration with Memorial Home Care. Once they have participated in the training program, caregivers can become eligible for direct services such as home modifications, respite care, and transportation.

Caregiver Connection is one more way that we're partnering with local nonprofit organizations to help make our community even stronger.

Promoting, Supporting Our Local Arts Scene

Our community is bursting with artistic talent. It's a rich resource that needs encouragement and promotion, which is why we at the Community Foundation believe so firmly in the importance of our ArtsEverywhere initiative. As part of ArtsEverywhere—and in our role as regional partner with the Indiana Arts Commission—we meet regularly with leaders from our arts organizations, getting their input on new ideas to promote and support the arts in our community. We host the ArtsEverywhere Web site—an online calendar that shows the full range of events taking place in our community to more than 12,000 unique visitors each month—and, in partnership with the *South Bend Tribune*, produce the *ArtsEverywhere* magazine, which reaches 75,000 people a year. And we've invested over \$1.6 million in local arts organizations since the ArtsEverywhere initiative began in 2004.

Those grants have benefitted arts outreach efforts such as the **Robinson Community Learning Center's** Shakespeare program, in which young people who might otherwise never be exposed to Shakespeare learn to read and stage his plays, and the **Fischoff National Chamber Music Association's** Artist Residency in the Mishawaka schools, where the members of IUSB's Euclid Quartet bring musical reenactments of stories, master classes, workshops, and mentoring to hundreds of Mishawaka students over the course of two years. One ArtsEverywhere grant helped **South Bend Civic Theatre** expand its programming for young people by making it possible for the organization to add a new position to its staff: Director of Theatre for Youth, currently held by Scot Purkeypille; another grant will fund private

music lessons for children at the soon-to-be-built **Salvation Army Kroc Center**. And ArtsEverywhere has also helped our local public television station, **WNIT-TV**, expand its ability to cover the arts and culture in our community.

In 2009, a major ArtsEverywhere grant supported *Innovation: George Rickey Kinetic Sculpture*, a collaborative series of exhibitions celebrating the work of South Bend native and internationally known artist George Rickey. In partnership with **South Bend Museum of Art**, Notre Dame's **Snite Museum of Art**, the

George Rickey Estate/George Rickey Foundation, and **1st Source Bank**, the Community Foundation supported a range of Rickey events, including the installation of five large, shimmering stainless steel Rickey sculptures in downtown South Bend, in place through September 2010. Other Rickey-related programs include the development of curriculum materials that incorporate Rickey's work, self-guided walking tours for families that investigate the math and science of Rickey's sculptures, kinetic sculpture awards for students, and more—all of which you can learn about at ArtsEverywhere.com.



Members of the Euclid Quartet pose with Twin Branch Elementary School students who have been participating in the Fischhoff National Chamber Music Association's Artist Residency.



Early Years Count Initiative Gives Education a Boost

You can't overestimate the importance of a child's first years of learning: Children who lag behind their peers in preschool and kindergarten often become even farther behind as they grow. *Every* child deserves the chance to learn, and that's why one of the Community Foundation's top priorities is improving early childhood education.

The Community Foundation's Early Years Count Education initiative began in 2001 when we received a \$5 million grant from the Lilly Endowment to boost the quality of children's education in the county. At the heart of the initiative was a goal to transform the quality of our local Head Start program. The **St. Joseph County Head Start** program (which has since become the Head Start Consortium of Elkhart and St. Joseph Counties) serves more than 1,000 children each year and is the largest provider of early childhood education to low-income families. At the time, Head Start was struggling. In 2000, the Community Foundation retained the HighScope Educational Research Foundation to conduct Program Quality Assessments (PQAs) in 14 county Head Start classrooms. The results were sobering: St. Joseph County programs scored lower than most of the others that

that were assessed.

Eight years later, our local Head Start program has become a model for others throughout the country. Thanks to the Early Years Count Education initiative and its coordinators Ann Rosen and Sue Christensen and continuing support from Head Start Executive Director Kathy Guajardo, all Head Start teachers and their assistants have been trained in the HighScope method, a research-based, nationally recognized curriculum that emphasizes hands-on learning. Most teachers have received some form of mentoring also, and thousands of dollars in materials have turned their classrooms into stimulating, inviting learning centers. Teachers are assessed regularly, and now PQAs are dramatically higher, reflecting the impact that these changes have made on our community's Head Start classrooms.

Since then, with generous support from the Jon and Sonja Laidig Foundation and others, we've continued to extend HighScope training, workshops, mentoring, and materials to hundreds of early childhood teachers, too. That makes a difference for thousands of our community's children, promising good things for their futures—and for ours.



P.O. BOX 837
SOUTH BEND, IN 46624

ADDRESS SERVICE REQUESTED

Non Profit Org.
U.S. Postage
PAID
South Bend, IN
Permit No. 360



Charles E. Martin, Sr., one of our community's most influential mentors, was responsible for literally hundreds of young African-American students attending college—and, because of Charles's regular, caring letters and calls, those young people stayed, worked hard, and graduated. The bust of Charles pictured above is located in the main hall of the Charles Martin Youth Center on Lincoln Way West in South Bend.

Charles Martin Scholarship: A 2009 Highlight for AACF

This year, a major highlight of the African American Community Fund's work was the creation of a new scholarship that honors one of our community's most influential mentors: the Charles Martin "Touch a Life" Scholarship. Executive Director of the YMCA Urban Youth Services program for more than 20 years, Charles knew how to challenge young people to think about the future. His personal motto was *Touch a life every day*, and he lived it, helping hundreds of local African-American students go to college and stay there through graduation because of his committed, caring support. Today, you can find many of "Charles's kids," as they call themselves, in professional positions throughout our community.

The first recipient of this \$2,500 renewable scholarship was Bryanna J. Bocardo, a Washington High School graduate who is currently attending Notre Dame. For

Bryanna and others, the scholarship provides more than financial support: In the spirit of Charles, a committee of his former "kids" will work together to mentor recipients just as Charles mentored them.

In response to a fundraising campaign led by Richmond and Virginia Calvin and Phil Byrd, "Charles's kids," friends, colleagues, and others have donated more than \$130,000 to support this new scholarship to date. We're closing in on our goal of \$200,000. Will you help us complete this final step? Your gift will be matched dollar-for-dollar through a challenge grant, doubling your ability to make an impact on the lives of deserving local students.

To contribute to the Charles Martin "Touch a Life" Scholarship Campaign, call the Community Foundation at (574) 232-0041 or visit www.cfsjc.org.