

Your Giving CONNECTION



2013 Annual Report

A Year of Giving and Gratitude

Dear Friends:

We are pleased to present the Community Foundation of Greater Fort Wayne's 2013 Annual Report. Inside we'll share with you some of the successes that your gifts create, whether you give through a scholarship or grantmaking fund, agency endowment, donor advised fund or another way of giving. There are many people who benefit from your gifts, and we are very grateful!



David Bennett

First, the numbers. We awarded \$4.5 million in grants and scholarships last year, and the stories of some of those grants are included in this annual report. Generous donors gave us nearly \$4 million in gifts, while our investment managers again notched up a great year – up 16%.



Jane Gerardot

But the numbers don't convey some of the great work of our volunteers. We worked with an ad-hoc committee to determine the best use for funds from the Isaac Campbell Kidd Fund, a field of interest fund established by an estate gift from Dr. William

Lewis, a local neonatologist. The primary purpose of the Kidd Fund is to support programs designed to help children, with an emphasis on programs that prevent child abuse and neglect. Board member Dr. Deborah McMahan chairs the committee which is comprised

of community volunteers, the majority of whom work in the field of child abuse prevention, diagnosis and treatment.

The Community Foundation, in conjunction with nearly twenty other foundations in northeast Indiana, hosted a luncheon for regional legislators in July. Eight members of the Indiana General Assembly attended, along with Congressman Marlin Stutzman.

In August, we held a birthday party to commemorate our 91-year history. The public was invited to join us at the Community Foundation for birthday cake and refreshments. This celebratory event provided an opportunity to share our name and mission with those in the community who might not otherwise know us.

To help our community learn more about their community foundation, we regularly host breakfasts or lunches that bring in members of our community to learn more about who we are and what we do. These "small group gatherings," as we call them, give us an opportunity to have conversations about the history of our foundation and how we serve all of Allen County. We welcome anyone to attend. If you would like to participate in one of these gatherings, give us a call; or simply say "yes" when we send you an invitation!

On behalf of our board of directors and staff, we extend our thanks and look forward to another year filled with giving and gratitude.

Sincerely,

David J. Bennett
Executive Director

Jane M. Gerardot
Board President

New Haven Family Continues Giving Tradition

“It’s a family affair,” explained Sam Graves. “Something that our parents did and a tradition we wanted to continue.”

A lifelong resident of New Haven, Sam and his wife, Molly, felt it was important to teach their kids the importance of giving back to their community. Sam’s involvement in the Young Leaders of Northeast Indiana (YLNI) exposed him to the Community Foundation of Greater Fort Wayne and introduced him to the various types of available funds and endowments that are offered.

Molly saw a donor advised fund as a way to instill philanthropy in the Graves’ three children: twins Will and Madeline, age nine, and five year-old Lucy. “The donor advised fund is a perfect fit for our family,” said Sam. “It’s hard to explain the stock market and exponential growth to kids, but Molly and I believe this is an ideal learning tool that lets our kids understand how money works. And, of course, it teaches them about ‘doing good’ at the same time.”

When Sam and Molly came in to sign the fund agreement, their children signed the document as well, giving them a feeling of ownership. A certain percentage of their earnings will also go into the fund.



From left: Molly, Madeline, Will, Sam and Lucy Graves.

As they get older and the fund matures, all three children will share in the decision-making of which charities are beneficiaries of the fund. “We’ve even talked about asking them to write a report, explaining why they believe we should give to a specific organization,” said Molly.

The hope, of course, is that the fund will remain a family tradition for generations to come. By the time Sam and Molly’s grandchildren are invited to participate, the fund should be of substantial value. “The Community Foundation showed us a way to create something worthwhile, even with relatively modest means,” Sam noted.



Lenora Lewark, center, with her parents, Kristi and Daniel Lewark.

Scholarship Helps Bring Smiles to the World

Lenora Lewark had always dreamed of attending the IU School of Dentistry. It was there, when she went to “Dental Day” during her junior year in high school, that her dream started to become a reality. In 2013, Lenora applied for – and won – the Robert C. Batchelder DDS Scholarship.

Established to memorialize his son, a dentist who died unexpectedly at age 51, Robert A. Batchelder created

(cont’d next page)

Scholarship *(cont'd from pg. 2)*

the fund to grant scholarships to deserving students who shared his son's passion for the field of dentistry.

Today, Lenora pursues her dream of attending Indiana University-Purdue University Fort Wayne (IPFW) and majoring in dental hygiene. As part of her application for the award, Lenora wrote: "I would really love to travel to underprivileged areas around the world and extend my services to them." She expressed gratitude for being able to continue her education "in the city I love," thanks to the Batchelder award.

Dental school costs can be prohibitive for some students and their families. The Batchelder Scholarship helps ease some of the financial pain, allowing determined students to follow their dreams and achieve their dental career goals. As Batchelder honors his son, the scholarship he established at the Community Foundation will help "take a bite" out of dental care education costs. We are confident that Batchelder's philanthropy will help Lenora bring beautiful smiles to people, perhaps from around the world!

Look What Your Investment Did in 2013!

Donors to the Community Foundation of Greater Fort Wayne invest in our community; and, like all investors, they expect a return on their investment. But it's more than just the 16 percent return on endowment funds. Below are a few examples of how your donations were invested in our community in 2013.

These programs were made possible as a result of generous support from all those who partner with the Community Foundation to bring quality to all our lives.

Not everything can be measured in dollars and cents. Our donors have also given of their time and talents throughout 2013. The yields from those gifts have made a significant impact on the greater Allen County community, and will continue to do so for years to come.

We are grateful for every dollar and every hour that you, our donors, have contributed for the common good. Thank you!

Investment	Return
\$10,000 operating grant to Crime Victim Care of Allen County Indiana (CVC) an organization that helps immigrants and non-English speaking people cope with falling victim to a crime; and helps them adjust to their new life in the United States with translation services, counseling programs and other services.	CVC translated and distributed awareness materials to non-English speaking families so they are able to report any cases related to child abuse and neglect. CVC is able to teach this population about United States laws, the value of education, and how to parent, discipline and participate in their children's lives.
\$40,000 agency support grant to the Carriage House , which assists people in their recovery from mental illnesses and reintegrates them into society.	About 70 members are seen each day to begin transitional employment, find housing or reach other personal and social goals.
\$12,845 in support of the new Dr. Bill Lewis Initiative , which seeks to advance the role of child protection among clinicians and non-clinicians through education, awareness and networking.	At the first local Conference of Child Abuse and Neglect, medical, law enforcement, first responders and childcare professionals received training on identifying and reporting suspected child abuse and neglect, and how to differentiate medical conditions and accidents from abuse.

**2013 Community Foundation
Board of Directors:**

Jane Gerardot, President

Boeglin Gerardot & Grubbs PC

Chris Rupp, Vice President

Dulin, Ward & DeWald

Shannon Hardiek, Treasurer

Phillips Financial

Tom Trent, Secretary

Rothberg Logan & Warsco

Michael Barranda

Burt, Blee, Dixon, Sutton & Bloom
LLP

Ian Boyce

Dickmeyer-Boyce Financial
Management

Andrew Brooks

Brooks Construction Company

Kathy Callen

Community Leader

Trois Hart

University of Saint Francis

Greg Johnson

Fort Wayne Newspapers

Kathy Kolb

Community Leader

Carol Lindquist

Indiana-Purdue University Fort
Wayne

Dr. Deborah McMahan

Fort Wayne-Allen County
Department of Health

Bruce Menshy

Community Leader

Don Steininger

Community Leader

Community Foundation Staff:

Krista Arnold, Scholarship Manager

David Bennett, Executive Director

Marva Crawford, Receptionist

Heidi Ludwig, Associate Director

Christine Meek, Director of
Programs

Donna Moore, Administrative/
Advancement Assistant

Ron Oetting, Development Associate

Rhonda Pequignot, Executive
Assistant/Office Manager

Beth Regedanz, Chief Advancement
Officer

Annette Smith, Grants Manager

Mary True, Marketing and
Communications Associate

Lori Voght, Finance Assistant

Paul Clarke Legacy Society

The Paul Clarke Legacy Society is comprised of individuals who have included the Community Foundation in their estate planning. The Society was established to recognize donors, provide opportunities to learn more about the community's needs and better connect donors with Community Foundation programs, staff, and services. The members are:



Paul Clarke

Neil and Sarilda Anderson
Edward and Ione Auer*
Richard and Gloria* Baker
Arthur A. Beal
James A. and Linda K. Beaman
Glen J. Beams*
James S. and Janet E. Beckstein
John and Ardis Behrendt
David L. Bell and Judge Janet Seiwert Bell
Norbert Berghoff*
Glen and Chris Bickel
Josephine E. Biedenweg*
Janet Bircheff
David and Janice* Bleeke
Ron and Mary Bonar
Glenn E. Brendel*
Arthur and Lou Brickman
Dr. Frank D. and Cindy Byrne
Chris and Amy Caggiano
Kathy Callen and John Powell
Howard L. and Elizabeth W. Chapman
Willis S. and Virginia B. Clark
Paul Clarke*
W. Windsor and Isabel K. Cravens*
Richard A. Curdes*
Dr. Chester H. and Mary E. Curry*
William Darling*
Haywood M. Davis*
James E. Davis*
Joseph A. and Marianne Manning Deitche
Dick Doermer*
Loren J. Drummond*
Carol A. Durham
N. Eugene and Val Evans
David W. and Donna S. Fledderjohann
Dr. Joseph and Charlotte Fogle
M. Eleanor Fritze
E. Elaine Frommel
Paul and Jeanne Gause
Jane M. Gerardot
Shirley J. Grabner
Patricia S. Griest
Helen V. Groot*
L. T. Guess*
Steve and Tana Harter
Jerome F. Henry Jr. and Rebecca J. Henry
Jeanine M. Herold and Michael T. Biesiada
Betty Ann Heyman
Mrs. Irene Hiatt
Forrest Houser*
Virginia Huguenard
Thomas* and Margaret Jehl
George L. Johnson* and Nancy F. Archer
Gordon O. and Judith M. Johnson
Margaret N. Johnson*

Marcelle E. Koomjohn*
Sandra K. Ladd
Floyd A. and Betty Lou Lancia
G. Irving Latz II*
Dr. Ed and Ginger Leonard
Stephen H. and Jeanne G. Lewis
Dr. William J. Lewis*
Gladys D. Lomont*
Cook* and Jeanne Lougheed
Mary C. Martin*
Francis McCammon*
Alan and Edee McMahan
Christine R. Meek
Ronald S. and Diane M. Menze
Charles Mitchener*
Aloyse Moritz
Amy B. Morrill*
Walter K. Murphy*
Arthur E. Nickerson*
John and Julia* Oldenkamp
Dr. C. James and Susan J. Owen
Michael V. and Kathryn R. Parrott
Frederick J. Pfeiffer*
Dick Phillips
Joseph E. Quinlan*
Randy and Carol Roberts
Julie Rhinehart Waterfield
Ervin and Elizabeth Rodey*
Christine M. and Mark E. Rupp
M. Joyce Schlatter*
Mark Schoeff Jr.
Clarence and Edith Schust*
Paul E. and Dorothy L. Shaffer
Gabriel L. and Jeanne R. Shaheen
Phyllis J. Sheldon
Tracy and Gretchen Shellabarger
Charlotte Simonis
Frank J. Smith*
Helen Smuts*
Graham and Thelma Somerville*
Allen C.* and Lois A. Steere
Thomas and Mary Jane Steinhauser
Don and Kathy Steininger
Ralph Stephan*
Jean Tipton
Mark D. Ulmschneider and Georgia
Wralstad Ulmschneider
John and Marion* Walley
Albert G. Ward*
Duncan Whitaker
Joe E.* and Margaret E. Williams
W. Paul Wolf
Dinah Wright
Anonymous (26 Donors)

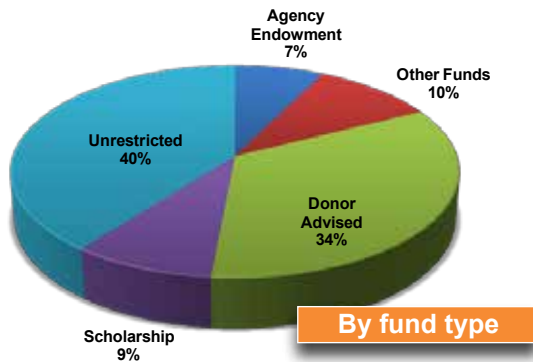
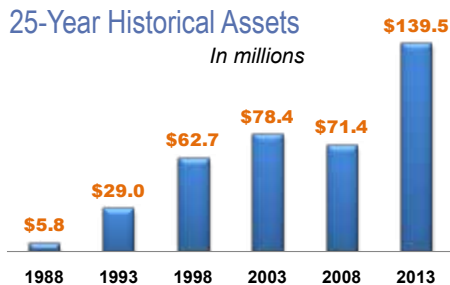
* Deceased

2013 Financial Highlights

As of December 31, 2013

ASSETS

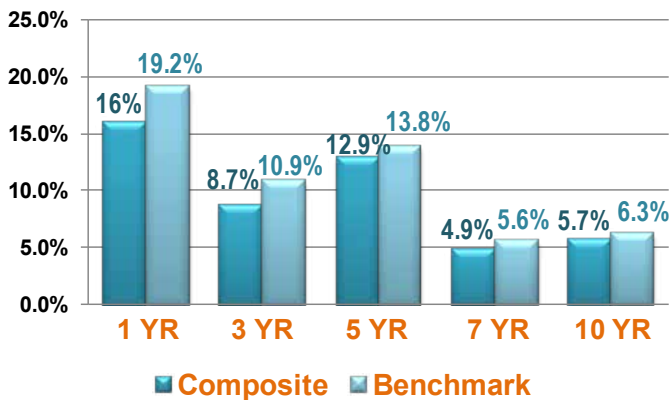
\$139.5 million
TOTAL ASSETS



In millions

Unrestricted	\$55.1
Donor Advised	\$47.4
Other Funds	\$14.1
Scholarship	\$12.6
Agency Endowment	\$10.3

INVESTMENT PERFORMANCE

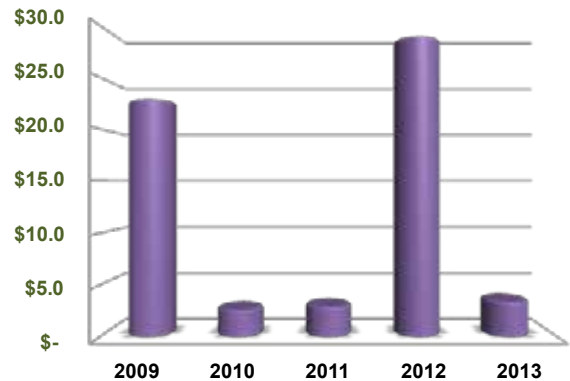


GIFTS

TOTAL Gifts \$3.9 MILLION

In millions

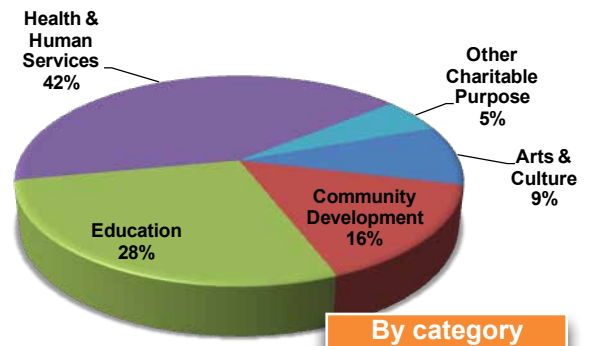
2013	\$3.9
2012	\$29.1
2011	\$2.8
2010	\$2.5
2009	\$23.0



GRANTS & SCHOLARSHIPS



TOTAL OF \$4.5 MILLION
 In Grants and Scholarships
AWARDED



Health & Human Services	\$1,906,859
Education	\$1,266,342
Community Development	\$695,596
Arts & Culture	\$419,422
Other Charitable Purpose	\$241,262

Complete financial statements for the Community Foundation of Greater Fort Wayne are available by calling 260-426-4083, or on our website at www.cfgfw.org/about-us/finance-and-investment.



555 E. Wayne St.
Fort Wayne, IN 46802
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Our Mission:

The mission of the Community Foundation of Greater Fort Wayne is to serve as a community leader to improve the quality of life by building permanent endowments, promoting effective grantmaking, fostering philanthropy, stimulating community dialogue, and helping donors achieve their charitable goals.

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