

LEGACY FOUNDATION



The Heart of Lake County



Annual
Report 2023





The Heart of Lake County

As Lake County's community foundation, we remain committed to the communities we serve with the help of its dedicated residents.

Legacy Foundation has proudly served as the philanthropic heart of Lake County, Indiana for over 30 years, with a vision to create an equitable community where all people thrive. As the community foundation, we channel the collective goodwill of individuals, families, businesses, and organizations toward transformative initiatives that enhance the lives of residents across our diverse region.

In 2023, Legacy Foundation announced and presented its inaugural Heart of Lake County Awards. Recipients consisted of community leaders who have used their time and talents to uplift Lake County.

The theme of this year's report was inspired by our newly established awards: Community Spirit, Excellence in Nonprofit Board Leadership, and the Gold Key for philanthropic professional advisors. At the heart of Legacy Foundation is a deep-rooted commitment to addressing the evolving needs of Lake County. Through strategic grant-making and collaboration, Legacy serves as a catalyst for positive change, addressing pressing needs and fostering long-term solutions.

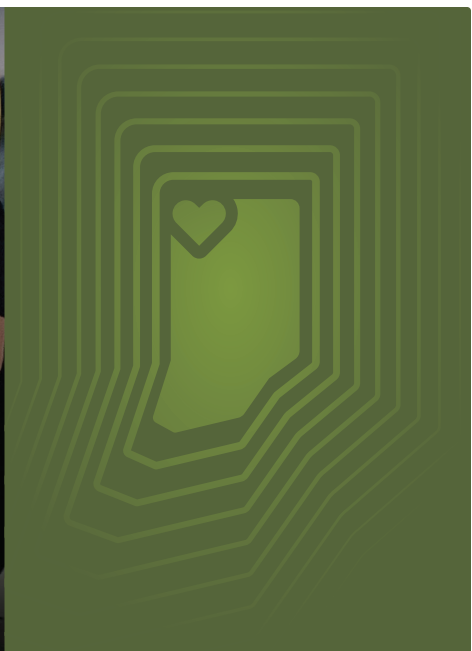
Whether supporting education, health and wellness, economic development, or cultural enrichment, Legacy's impact resonates to every corner of Lake County.

We are powered by your generosity and a shared mission to build a vibrant and resilient Lake County.

Calvin Bellamy
received the Excellence in
Nonprofit Board Leadership

Dr. Vernon G. Smith
was awarded the
Community Spirit Award

Verne P. Seehausen
was presented with the
Gold Key Award



Scan to Read
the Full Report



Pictured in order left to right: Kelly Anoe, Calvin Bellamy, Dr. Vernon G. Smith, Verne P. Seehausen, and Carey A. Yukich

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Welcome

LEGACY
FOUNDATION



Kelly Anoe
President & CEO

Dear Friends and Supporters,

We are beyond excited that Legacy Foundation was awarded a matching fund grant totaling \$7.5 million as part of the eighth phase of Lilly Endowment Inc.'s initiative, Giving Indiana Funds for Tomorrow (GIFT). Legacy Foundation plans to allocate funds to build unrestricted endowments supporting grants to nonprofits in Lake County, initiatives, and collaborative efforts to improve quality of life. However, that can only be achieved with the support of donors to help us meet the match. We are grateful for the engaged and enthusiastic response which amplifies the support we collectively provide. Advancing the culture and practice of philanthropy in our region is a priority for Legacy Foundation, with learning and collaborative giving as important cornerstones of our work. Building and sustaining thriving communities can only be achieved through collaboration and partnership, and we look forward to continuing our work together.



Carey A. Yukich
Chair, Board of Directors

Our network of partners continues to grow year after year, which adds to the diverse perspectives that have been guiding Legacy Foundation since 1992. Together, we can ensure that philanthropy is a catalyst for innovation, impact, and inclusion. Our vision to create an equitable Lake County where all people thrive requires using the many tools at our disposal – our leadership voice, grantmaking dollars, and collaborative work with donors and nonprofit partners. I hope you enjoy reading some of the stories of impact and giving back from the past year within these pages of this 2023 Annual Report.

Thank you!

Impact by the Numbers

20
23

Grants Awarded

\$3,626,038.34

Scholarship Awards

\$1,753,048

Foundation Assets

\$84,321,841 as of 12/31/2023

Total Funds

351

Gifts

\$2,725,800.84

Total New Funds

22

Strategic Plan

Legacy Foundation's 2024-2028 Strategic Plan will focus its impact in 5 guiding pillars.

In August of 2023, we launched our new 5-year strategic plan, with the idea that community challenges require a deep understanding of the local landscape along with earned trust, intentional listening, and collaboration.

Over 8 months, we spent time listening to and learning from over 100 diverse voices from community members, donors, and grantees through interviews, focus groups, and surveys. A lot of the feedback was positive; however, many respondents were not familiar with the various aspects of our work. With our new strategic plan, it is our goal to remain the same at the core, while boldly expressing our intentions and commitment to the communities we serve and expanding our outreach to those who are less familiar with the multi-faceted work we do.

Strengthening Organizations

Pillar 1

Establish capacity building grants that develop nonprofit infrastructure.

Expand Legacy Learning Lab training and education programs.

Create leadership and development opportunities for nonprofit staff and Lake County community residents.

Connecting Communities

Pillar 2

Acknowledge and celebrate resident contributions and achievements.

Invest in Rise NWI as a trusted source of nonpartisan civic engagement.

Launch a program that collaborates closely with neighborhoods to actively involve residents and advance community projects that emphasize a sense of place.

Give Locally

Pillar 3

Strengthen relationships with a diverse set of professional advisors.

Increase opportunities to give that are innovative and convenient.

Establish specific funds to identify opportunities for community members of diverse backgrounds to contribute in a way that is meaningful to them.

Mobilize Philanthropy

Pillar 4

Utilize data to understand the impact of Legacy Foundation funding.

Refine the grantmaking process to align with nonprofit organizations.

Identify strategies to enhance scholarship application rates from underrepresented schools and collaborate with organizations to support students.

Supporting Entrepreneurship

Pillar 5

Create mechanisms for investing in placemaking and tactical urbanism.

Increase access to community capital through CDFI partnerships.

Expand NWI BizHub visibility and engagement to provide small business owners with access to services to help them grow their business.

Lake County Forever

A limited time opportunity for the future of Lake County!

As part of the Lilly Endowment Inc.'s initiative, Giving Indiana Funds for Tomorrow (GIFT), Legacy Foundation was awarded a matching grant totaling \$7.5 million! Triple your impact by donating to an unrestricted endowed fund at Legacy Foundation.

Donate to support community grantmaking

Over \$530,000 in grants awarded each year!

\$50

+

\$100

=

\$150

Your Dollars

Matching Dollars

Triple the Impact

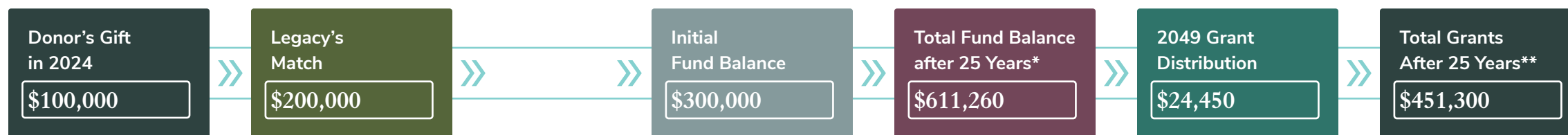
Campaign Goal	
Raised Money from Donors	\$1.937 M
Match Funds from Lilly Endowment	\$3.875 M
Total Added to Unrestricted	\$5.8 M
Impact After 10 Years	
Raised Funds Total	\$7.9 M
Additional Grants Annually	\$316,800
Total Grants from Raised Funds**	\$2.8 M

Lilly Endowment Inc. will give Legacy Foundation \$3,875,000 if we raise \$1,937,000 from our community by June 30, 2025!

Scan to Read More

The Power of an Endowment

See how your gift can grow!



*estimated annual investment return of 7% — **4% annual distribution

Now is the perfect time to establish a new unrestricted fund or support the Lake County Community Fund

When you give to a Legacy Foundation unrestricted fund, you are providing resources to address ever-changing community needs.

Your initial gift can triple in size, and future gifts made during the matching period to the fund may also be tripled! Legacy Foundation accepts cash, stock, art, real estate, and IRA assets.



Thank you to these funds that support our grantmaking priorities.

To learn more, contact Erica Fizer Katsepas at 219-736-1880 or efizer@legacyfdn.org.

+ How are unrestricted funds used?

At Legacy, our unrestricted endowed funds are used to support grants to nonprofits and programs that serve Lake County.

+ Why is an unrestricted endowed fund helpful?

Unrestricted funds provide the much needed dollars to support the people and nonprofit organizations addressing current and future needs in Lake County. Our grantmaking for priority community needs is overseen by a board of directors and professional staff to ensure funds are used for maximum impact.

+ What is our process for monitoring grant funds?

After grants have been made from unrestricted funds, Legacy Foundation ensures due diligence by conducting site visits and collecting final reports to learn more about the projects funded and about the work being done by our amazing local nonprofits, ensuring that your gift has been spent in an impactful way.

+ What is the GIFT VIII match timeline?

The timeline for the GIFT VIII Lilly Endowment match is October 1, 2023 – June 30, 2025. Irrevocable pledges made during the matching period are required to be paid by December 31, 2027.



Donors

The Lauer Family

Shaping the future they want to see.

Bob and Lauren Lauer were cognizant of the struggles faced by many with less and recognized the impact they could have by starting a fund in their thirties. Inspired by a popular podcast, they committed to giving back 10% of their income annually to actively shape their envisioned future.

The Lauers worked with Legacy's CEO, Donor Engagement Director, and Scholarship Administrator to identify the causes they wanted to support.

“By working with the Legacy Foundation to give back locally, we've been able to build a strong sense of connection and purpose within our community, which we deeply value. We hope to inspire other young individuals to join us in contributing to positive change.”

In addition to opening a donor advised fund, the Lauers started a scholarship fund that reflected Bob's role at a computer programming school. Discussions with Legacy staff highlighted the shortage of scholarships that support non-traditional forms of higher education, even as the number of students enrolled in such programs continues to steadily increase. The Lauers created the Building the Future Vocational Scholarship, aimed at empowering Lake County residents to pursue vocational or trade school education with the goal of local employment. The collaborative effort not only resulted in the creation of a meaningful scholarship, but also underscored the potential for positive change when community stakeholders work together.



“We integrate giving into our budget, ensuring consistency and fostering a sense of accountability to our commitment to philanthropy. This approach not only allows us to support important causes consistently, but also reinforces the importance of generosity in our lives.”



Scan to
Read More

Their advice to peers:

Commit to donating a percentage of your annual salary and then make the contributions on a monthly basis, similar to the common practice of committing a portion of your income to retirement savings.

2023 Donors

A

- 18th Street Brewery Gary, LLC
- Edward and Dolores Abromaitis
- Acme Print Copy Design
- Robert Acosta
- John Albers
- Albert's Diamond Jewelers
- Brad and Kristina Alvarez
- Elizabeth Alvarez
- Scott Alwin
- Amazonsmile Foundation
- Kelly Anoe
- Sandra Appleby
- Armans Restaurant
- Taghi Arshami
- John and Lillian Attinasi
- Auditor of the State
- David and Dorothy Austgen
- Bruce E. and Judith N. Ayers

B

- Frank Baccino
- Bank of America Charitable Foundation, Inc.
- Evelyn Banzon
- Paul Bartos
- Leslie Beck-Pociask
- John Beebe Sr.
- Calvin and Catherine Bellamy
- Eric P. Bergstrom
- Kathleen Bernicky
- Estate of Joan Berry
- Richard and Mary Ann Best
- David Besterman
- Hussain Bhanpuri
- Linda Blomquist
- David and Ann Bochnowski
- Wallace and Janice Boilek

B (continued)

- Debra Bolaños
- Books, Brushes & Bands for Education
- Mark Borst
- Bosak Motors of Merrillville
- Ian Boyle
- Boys & Girls Club of Northwest Indiana, Inc.
- Cleo Brown
- Bumbales & Son, Inc. (dba Lake Station Ace Hardware)
- Burke Costanza & Carberry, LLP
- Xavier Burks
- Maria Burud
- Tom Byelick
- Cafe Borgia Inc.

C

- Robert Campion Revocable Trust
- Mary Therese Carey
- Catholic Charities Diocese of Gary
- Cenifax, Inc.
- Centier Bank Corporate
- Centier Bank Schrage Family Scholarship
- Elizabeth Cera
- Thomas and Theresa Cera
- Corya Channing
- Michael Chirich
- Stephanie Cislo
- Margot and Glenn Clark
- Cleveland-Cliffs Steel LLC
- Nancy Cohen
- Susan Cohen
- Tom and Sylvia Collins
- Mary Comer
- Commercial In-Sites, LLC
- Danna Conley

C (continued)

- Monica Conrad
- Willie Cook
- Tracy Cooley
- Richard and Joyce Coprljevic
- Brad Crenshaw
- Jim Crisman
- Crossroads Regional Chamber of Commerce
- George and Marianne Culver
- Emily Cutka
- Rose Cyphert

D

- John Davis
- Wilbur and Jean Davis
- Tim Davoren
- Manelita Dayon
- Jack Denges
- Joseph and Marla Dernay
- John Derosseau
- Jerry and Barb DeYoung
- John and Louise Diederich
- Christopher Dilts and Megan Cecil
- Julie Dilts
- Mattison and Gene Dilts
- Disabled American Veterans No. 17
- Diane Dluzak-Brown
- Michael and Kathryn Dobosz
- Erica Dombey
- Matt and Cynthia Doyle
- Deborah Doyle
- Michael and Vikki Doyne
- May Drysch
- Mary Dugger
- Dunes-Calumet Audubon Society
- Peter Dyba
- Dyer Memorial VFW Post 6448

E

Sean Egan
 R. Ritchey Eibel
 Linda Eisenhauer
 Ryan Elinkowski
 Gail Elkins
 Marie Englehart

F

Fair Haven Rape Crisis Center
 Georgia Falkenberg
 Robert Farag
 James E. Feltzer
 Sarah Ferraro
 Fidelity Charitable
 Sandra Finnegan
 Rodney and Linda Fisher
 Flamingo Pizza of Miller
 Foundations of East Chicago, Inc.
 John Freyek
 Mariann Frigo
 Alana Furlow

G

Josh Gamble
 Charles and Colleen Gardiner
 Taylor Garrett
 Marian Garrigan
 Gary Community
 Partnership Corporation
 John Gerber and Jennifer Gates
 Mary Geroch
 Mary Gerritsen
 Lisa Giglio
 Robin Gintert
 GL Ace, LLC
 Godwin Realty Company
 William and Sandra Goldsby
 Patricia Gonzales
 Monica Guzman Gonzalez

G (continued)

Google (Payroll Match)
 Myrene Gordon
 Jolynn Gosser
 Grantstation.com, Inc.
 Mary Ann Greiner
 Estate of Barbara A. Gross
 Jose Gutierrez
 Mario Guzman

H

Linda Halas
 Bessie Halfacre
 David R. Hall and Michael C. Nugent
 Cindy Hall
 Mary Ann Hamill
 Hammond Education Foundation
 Mike and Jennifer Hansen
 Bruce Harlow and Paul Weldin
 Alan Harrell
 Kathalene M. Harris
 Haywood and Fleming Associates
 Alfred Hoffman
 Collis Hooks
 Horizon Bank
 James and Claudia Huson

I

IBEW Local #697
 Independent Colleges of Indiana
 Indiana Grocery Group, LLC
 dba Strack & Van Til
 Indiana Philanthropy Alliance (GIFT)
 Indiana University Northwest

J

John W. Anderson Foundation
 Gary Johnson and Brenda Ashley
 Martin K. Johnson
 Nancy and Allen Johnson
 Natalie Johnson

K

George and Susan Kallimani
 John Kaminski
 James Kapla
 Roger and Elizabeth Kapla
 Elizabeth Kasbeer
 Erica Katsepas
 Judy Katz
 Stephen Kavois
 Helen Keen Thoesen
 Pat Kelly
 Rebecca Kendall
 Balagopal Keralavarma
 and Anitha Nair
 Fran Kintzele
 Deborah Kirk
 John and Karin Kirulis
 Amy Klefeker
 Denise Koebcke
 Lorna Kotlin
 Ed Kozlowski
 Connie Kreps
 Leslie Krupchak
 Thomas Kuhn
 Richard Kutchek

L

Jose Lagunas
 Lake County Amateur Radio Club, Inc.
 Lake County Athletic
 Officials Association
 Lake County Bar Association
 Lake County Fish and Game
 Lake Street Gallery
 Lakeshore Health Insurance Brokers
 Lakeview Investment Group
 & Trading Company, LLC
 Larry Lapidus
 Bob and Lauren Lauer
 Leo's Mobile Bicycle Service
 Nancy Levgard

L (continued)

Randolph and Marian Kay Lewis
 Lilly Endowment, Inc.
 Judy Lindsey
 Chase Lowden
 Robert Lowry

M

Millicent Macon
 Chukwudi Maduakolam
 Frank and Tyra Marmo
 Marvin Weiss Trust
 Amanda Maynard
 Garrard and Quonica McClendon
 Terri McCormick
 Jo Anne McDonald
 Terry and Karen McMahan
 Sara McPherson
 Joe and Nancy Medellin
 Melton For Mayor of Gary
 Methodist Hospital
 Meyers Glaros Group
 Mike Anderson Chevrolet
 Miller Garden Club
 Scott and Sandra Miller
 Ronald and Karen Millies
 Amira Mohammed
 James Allen Moore
 Morgan Stanley Gift Fund
 Gloria and Robert Morris
 Richard Morrisroe
 Sandra Mosley
 Celeste Murday
 Linda Murphy
 My Way 2 Work

N

Sally Nalbor
 Robert Nemeth
 New Star Services
 Myrna Newgent
 NIPSCO
 NiSource Charitable Foundation
 NiSource, Inc.
 Northern Trust Company
 Northwest Indiana
 Forum Foundation, Inc.
 Northwest Indiana Veterans
 Action Council (NWIVAC)
 Samantha Norton

O

O.M.A.R. Presents
 Jenifer Okamura
 Radek Oksimowicz
 Julie Olthoff
 Order of Ahepa 78
 Pam Ott
 Margaret Ozimec

P

Park Place 84, LLC
 Lauren Partan
 Renee Patterson
 PayPal Giving Fund
 Peoples Bank Corporate
 Peoples Gas Light and Coke Co.
 Per Mar Charity Fund
 Carmelita Perry
 Jeffrey Perz
 Gloria and Steve Pestikas
 Joe and Maryetta Petras
 Alice Pickford
 Bryan Piskol
 Polycon Industries, Inc.
 Jennifer Poncin
 Stanley and Julie Porter

P (continued)

Powder Coating Creations
 Ted and Wendy Prettyman
 Proctor Technologies Inc.
 Progressive Democrats of America
 Purdue Federal Credit Union
 Purdue University Northwest
 Purdue University, West Lafayette

Q

Quantum Corridor, Inc.

R

William Ramos
 William Tom Randall
 Cirilo Rangel
 Erica Rangel
 Barry Rapoport and Tina Repnicki
 Laura Reid
 Renita Reyna
 David Rich and Margaret
 Gardner Rich
 Robin Rich
 Jill Ritchie
 Martha Rivas-Ramos
 Cynthia Roberts
 Robinson Engineering, LTD
 Jean and William Robinson
 Michael Rodriguez
 Diana and Steve Rogers
 Anna Rominger
 Thomas and Paula Rooney
 Ann E. Rose
 Bud and Kay Rosen
 Damian Rouson
 Lance Russell
 Susan Rutsen
 Geoffrey Ryan

S

- Antonia Sanchez
- Ken Sandine
- Carmella Saraceno
- Carolyn Saxton and Bill Gregory
- Matthew Scheuer
- Jill Schlueter-Kim
- Verne P. Seehausen
- Thomas Serynek
- David and Karen Simon
- Linda Simon
- Deborah Williford-Simpson
- Carol and Phillip Smith
- Toya Smith
- Diana Smoot
- Sociedad Cultural Y Civica la Reforma
- Tom Sourlis and Sue Eleuterio
- Mikayla Guzman Southwell
- Allen and Ann Deborah Spajer
- Robert Spajer
- Stephen Spicer
- W. James and Elaine Spicer
- Deborah Stalmack
- Mary Stark
- Charles W. Steele
- Dick and Betty Sterk
- Mark Stern
- Yolanda Stoffregen
- Sophia Stratton
- Verlie Suggs
- Swank Boutique
- Mark Swanson

T

- Lisa and Ron Talbot
- TCB Communications, LLC
- Temple Israel Sisterhood
- Megan Thornberry
- Don Tokoly
- Jack and Judith Tonk
- Town of Merrillville
- Tradewinds Services, Inc.
- True Wealth Advising Group
- Brandi Turner
- Mardie Tuttle

U

- Tim and Michelle Ulanowski
- United States Steel Corp.
- United Way Northwest Indiana
- Urban Enterprise Association
- Urban Institute

V

- Robert R. Van Slyke
- Frank and Gladys Van Til
- Dan Vance
- Dawn Vanzo-Gessler
- Veteran's Roundtable
- Viktoria Voller

W

- Jeanne Wease
- Terri Weems
- Julie Wendorf
- Kent and Sally Westley
- Raven Whiteside
- Chelsea Whittington
- Barbara Wilhelm
- Rebecca Lynn Williams
- James Winters
- Maren Woodlock
- David. W. Wright

X

- Xel-Ha Escuela De Danza Inc.

Y

- Richard and Pamela Young
- YourCause Paying agent for The Blackbaud Giving Fund
- Carey and John Yukich

Z

- Carla Zamora
- Darren Zar
- Sherri Ziller

Women in Philanthropy

Legacy Foundation's Women in Philanthropy Group

A network of dedicated philanthropists who strive to enhance the lives of women and children throughout Lake County, Indiana.

WIP creates a sustainable source of funding and opportunities for women and children in Lake County to fully participate and thrive in their communities. The ideas and investments of each member strengthen the group's ability to make strategic, impactful grants to local nonprofits.

\$19,000

Total in grants from the spring and fall cycle.

The supported organizations were: Crisis Center, Jacob's Ladder Pediatrics, Sojourner Truth House, Haven House, and Safe Coalition for Human Rights.



"I became a member of WIP so I could contribute to organizations that focus on women and children. WIP makes it easy for me to give back to areas that I care about. Without this collective effort, I'm just not sure how else I could manage to help effect change. I also love that I have the opportunity to give my input for grant making."

- Alana Furlow, WIP Member



Members

- Kathleen Bernicky
- Karima Hasan Bey
- Margot Clark
- Nancy Clifford
- Monica Conrad
- Cynthia Doyle
- Susan Eleuterio
- Georgia Falkenberg
- Nancy Frigo
- Alana Furlow
- Diane Gordon
- Jolynn Gosser
- Mary Ann Greiner
- Jessica Kartz
- Erica Katsepas
- Judy Katz
- Lisa Kuehl
- Judy Lindsey
- Ashley Luptak
- Kimberly Modigell
- Pam Ott
- Rosa Peña
- Cynthia Roberts
- Carol Smith
- Toya Smith
- Shawn Strack
- Verlie Suggs
- Megan Thornberry
- Mardie Tuttle
- Chelsea Whittington
- Carey Yukich

\$8,000

In funding was granted to Jacob's Ladder Pediatrics from WIP.

With this funding, the organization purchased equipment used to provide hearing screenings for children in underserved areas of Lake County.



Legacy Society

The Legacy Society honors those donors who have expressed their commitment to charitable giving by naming Legacy Foundation as the beneficiary of a gift in their will or estate plans.

Gifts may include a bequest and/or charitable income gifts, such as gift annuities, charitable remainder trusts, or gifts of life insurance or retirement plan assets.

Robert and Nancy Anadell
 Lisa Ausgten
 Cheryl L. Austin
 Frank Baccino
 Glen E. Bacus
 Joseph Barbarossa
 Calvin and Catherine Bellamy
 Catherine Riley Boege
 John M. Cain III
 Robert and Betty Campion
 Elin J. Christianson
 Estate of Stanley D. Christianson
 Margot and Glenn Clark
 Nancy and Richard Clifford
 Arthur R. and Nancy M. Collins
 Ruth Cornwell
 Marcia Dемpe
 Michael Dobosz
 Judith Dow
 Sean Egan
 Jeffrey P. Gajewski

Richard Gardner
 Bobbi Gasser
 James H. and Mary Ann Greiner
 The Estate of Barbara A. Gross
 The Estate of Dorothy Gross
 Collis Hooks
 Jeanne Howarth
 The Estate of Sandra M. Hynek
 Nancy and Allen Johnson
 Robert Johnson
 Richard and Sylvia Komyatte
 Carol Kutak
 Eleanor B. Leese
 Mary Manos
 James and Linda Martin
 Irene Mateja
 Barbara Miller Meeker
 The Estate of Patricia Merrell
 Thomas and Joanne Nastoff
 Fred Newman
 Margaret V. Ozimec

Victoria A. Ozimec
 Tammy Pavlowski
 William J. and Roseann Quilling
 Robert E. Rainsberger
 Maria M. Reiner
 Lois Rhinesperger
 The Estate of Alice Rogers
 George Rogge
 Susan Rutsen
 Verne P. Seehausen
 John Shroat
 Sharon Siebecker
 Joseph Skora
 Edith L. Sonntag
 Lynnette Stephens
 Fred and Judith Van Senus
 Kenneth Wilk
 The Estate of Martha L. Woodward
 Pamela Meyer Yttri
 John and Carey Yukich



Ways to Give

Witness the impact of your giving with a donation today



Make a Future Gift

Leave a legacy with a gift in your will or estate plans.

Bequest

A bequest is one of the easiest gifts to make. With the help of an advisor, you can include language in your will or trust specifying a gift to be made to Legacy Foundation, Inc. as part of your estate plan. You can donate a specific dollar amount, a percentage of your estate, or the residual of your estate. Your estate qualifies for a charitable deduction for the full donation.

Beneficiary Designation

A beneficiary designation gift is a simple and affordable way to make a gift to support Legacy Foundation, Inc. You can designate us as a beneficiary of a retirement, investment, or bank account, or your life insurance policy.

Federal Tax ID # 35-1872803

Cash



Write a check or use a credit card. Easy to make; receive an income tax charitable deduction for full amount of gift.

Stocks & Bonds



Transfer appreciated assets held for more than one year. Receive an income tax charitable deduction for full fair market value; avoid capital gains tax.

IRA Qualified Distribution



At age 70½ or older, direct your IRA custodian to make a qualified charitable distribution (QCD) to Legacy Foundation. Avoid taxes on transfers of up to \$105,000 from your IRA to our organization, reduce your taxable income, and satisfy your required minimum distribution.

Gift of Grain



By gifting grain to Legacy Foundation, you avoid including the sale of the grain in your farm income, and your taxable income is reduced. Farmers may realize savings on federal and state income taxes and self-employment tax while still deducting the costs of production.

Charitable Gift Annuity



Donate cash or appreciated securities in exchange for fixed annuity payments. Charitable deduction for gift portion of donation; part of payments may be tax-free return of principal; capital gains tax on transfer spread over donor's life expectancy if donor is the annuitant.

Programs



Legacy Foundation President & CEO, Kelly Anoe, and LCAC member Cal Bellamy, with Futurecast panelists Carol Rogers, Phil Powell, Kristoph Kleiner, Micah Pollak, and moderator Dr. Surekha Rao.

LCAC

After 58 years, the Lake County Advancement Committee turned over its reins to the Legacy Foundation.

Since its inception in 1965, LCAC has been identifying major social, economic, and policy issues impacting the citizens of Lake County, educating Lake County leaders and the greater community about these important issues, and engaging in dialogue around these topics.

We partnered with Indiana University for Futurecast, hosting a panel of guest speakers that covered the economic outlook for 2024 locally and beyond. Economists from Indiana University's Kelley School of Business shared their economic outlook for the Region, State of Indiana, and the Nation.

Good news prevailed as the experts discussed a rosier 2024 outlook stating that population growth, a strong economy for workers, and a 5.8% wage increase have worked to put NWI in a place where "the sun is shining brightly on us as we go into the future."

With over 150 Northwest Indiana residents, businesses, and nonprofits in attendance, LCAC member Cal Bellamy passed the baton to President & CEO, Kelly Anoe.

“ After a brief retirement, we're back with Lake County Advancement Committee 2.0
- Cal Bellamy

Legacy is thrilled to continue the lunches, conversations, and advancement of Lake County. We will carry forward the mission and rich history of LCAC, while encouraging members of the community to join these important conversations.



Scan to Read More

Learning Lab

Strengthening nonprofit capacity and leadership, Legacy Learning Lab supports Northwest Indiana nonprofit organizations through workshops and strategic resources.

Over the year, Legacy Foundation hosted 13 events and workshops, collectively engaging nearly 500 attendees. Topic sessions included employment law, investing, attracting donors, grants, and executive director peer group. Additionally, it supported capacity building initiatives to further support local nonprofits.

GrantStation

Legacy Foundation partnered with GrantStation, an online database of grant opportunities, to offer Lake County serving organizations a discounted one-year membership to GrantStation. Through this partnership, nearly 40 nonprofits have received a discounted membership of over \$600 in savings and have access to thousands of grant opportunities from private and governmental agencies, along with tools to strengthen their grant applications.

Resilia

Legacy Foundation provided 10 local nonprofits a year-long membership to the Resilia platform. Resilia's goal is to amplify philanthropic impact by offering nonprofits access to capacity building support, technical assistance, and one-on-one coaching. By using the variety of available tools, "nonprofits become stronger and more sustainable by building knowledge, developing diversified funding, and tracking their impact." Members accessed over 200 resources in areas of strategic planning, board orientation/development, and fundraising.

Topic Sessions

- Employment Law _____
- Investing _____
- Attracting Donors _____
- Grants _____
- Executive Peer Group _____

13

Events and workshops were hosted by Legacy Foundation over the year.

500

Attendees were collectively engaged.

LEGACY LEARNING LAB (L)



Rise NWI

Legacy Foundation's civic engagement program, Rise NWI, empowers residents to create change within their community.

Voter Engagement

Rise NWI engaged over 300,000 NWI residents through digital and in-person education around the 2023 municipal elections. Voters were educated on election dates, making a plan to vote, engaging with candidates, and voter rights. Additionally, through a partnership with the League of Women Voters of the Calumet Area, Rise NWI published VOTE411 Lake County, an online nonpartisan voter engagement hub to educate voters on the positions up for election and the candidates running for office.

While civic engagement is the core of Rise NWI, in 2023, the program implemented initiatives to address time-based community needs.



300,000+

Residents across NWI were engaged.

NWI BizHub

Strengthening Northwest Indiana's entrepreneurial ecosystem.

During 2023, NWI BizHub expanded its entrepreneurial support to the seven-county Northwest Indiana Region, adding services to Jasper, Newton, Pulaski, and Starke Counties.

NWI BizHub focused on providing one-on-one support, addressing each client's unique business needs. The program brought together hundreds of small business owners through networking and training events, engaging in one-on-one conversations with over 1,500 entrepreneurs and resource partners in the community.

2,200

Individuals engaged since 2020 through the NWI BizHub Resource Navigator.

NWI BizHub is a regional partnership among Legacy Foundation, Crown Point Community Foundation, Unity Foundation of La Porte County, Center of Workforce Innovations, and Northwest ISBDC.



“ Belstra first connected with NWI BizHub during a Network Night at Fenwick Farms Brewing Company last summer and had a great time meeting up with fellow small businesses and resource partners. This initial contact resulted in Belstra Farm and Garden, which is our new store in DeMotte, being featured in an interview on NWI Business Spotlight. This interview was not only a professional experience but our interviewer Chelsea Whittington made it feel easy and fun. We're definitely looking forward to the next event with NWI BizHub!”

-Vanessa Donovan, Belstra's Milling Company



20+

Accessible vaccine clinics were locally organized.

Health Equity

Our Shot 219

Through a grant from the Urban Institute, and focused on breaking barriers to healthcare, Our Shot 219 assisted in organizing vaccine clinics with local health-care providers at over 20 accessible locations, including churches, small businesses, and community centers. These clinics provided COVID-19, Flu, Shingles, and other CDC recommended vaccines. Attendees were encouraged to participate in other preventative care screenings at these clinics, such as blood pressure and glucose testing. Through these events nearly 700 vaccines were distributed.

The program's educational campaign developed 50 communication products that engaged 249,000 individuals digitally and over 11,500 residents at various community events. Through developed materials and meaningful one-on-one conversations, the program provided up-to-date accurate information to residents.

Affordable Connectivity Program

Get Connected, Lake County

Get Connected, Lake County assisted households in applying for the Affordable Connectivity Program (ACP) which provided low-income households free or reduced internet access. Program volunteers visited 42 community events to help residents apply for ACP. Additionally, a digital ad campaign was generated to spread program awareness and eligibility.

42

Community events were attended to help residents apply for ACP.



Grants



“ Nature-based learning promotes the academic, physical, and social well-being of youth. When kids gain the environmental know-how they need to thrive in our rapidly changing world, we see smarter decisions, stronger communities, and daily actions that improve their well-being and our planet.

- Heather Hahn Sullivan
Dunes Learning Center, Executive Director

Dunes Learning Center

Invest in environmental education: exploration and connections in nature's classroom.

With the support of a Legacy Foundation Transform Lake County grant, Dunes Learning Center continues to provide excellent nature-based learning adventures that spark curiosity, joy, and wonder for a new generation of youth. This program equips students with the skills and compassion needed to ensure nature and our communities are healthy and thriving for those who follow. The children who participate in programming at Dunes Learning Center develop a lifelong connection to nature that empowers them to make smarter decisions that lead to stronger communities and a greener planet.

“ My students come from a high-poverty area. Many have never left the neighborhood or experienced the lakeshore. They need to see all the beauty that lies within the Indiana Dunes.

- 4th Grade Teacher
Kenwood Elementary in Hammond

7,416

Individual program participants in 2023-24.

Whether in a classroom, canoe, or anywhere in between, research shows that nature-based learning sticks with kids more than traditional learning, fueling interests in science, and sparking the curiosity that makes them better learners. It also improves health and wellness, because going outdoors to explore nature benefits children's mental and physical health. Environmental education strengthens children's self-esteem, leadership, and character, and enhances social justice by leveling the playing field.



Scan to Read More



2023 Legacy Foundation Grantees

A

Abundant Life
Tabernacle Church, Inc.
\$1,000.00

African American Achievers Youth Corps, Inc.
\$2,000.00

Alaska Raptor Center
\$177.00

Alehsan Foundation
\$500.00

American Bible Society
\$500.00

American Cancer Society
\$500.00

Association for Wolf Lake Initiative
\$300.00

Association of Fundraising Professionals - NWI
\$1,000.00

B

Banneker Elementary at Marquette School
\$198.01

B (continued)

Beachfront Dance School
\$200.00

Best Buddies International, Inc.
\$5,000.00

Bonton Farms
\$25,000.00

Books, Brushes & Bands for Education
\$10,300.00

Boys & Girls Club of Northwest Indiana, Inc.
\$51,488.00

Brothers' Keeper, Inc.
\$17,860.00

C

Calumet College of St. Joseph - Whiting
\$17,698.00

Calumet Heritage Partnership Inc.
\$750.00

Camp Quality USA - IL
\$680.00

C (continued)

Campagna Academy - Gibault Children's Services
\$1,605.00

Cathedral Hill Montessori School
\$25,000.00

Catholic Charities
\$4,312.00

Catholic Medical Mission Board
\$4,790.40

Catholic Relief Services
\$4,790.40

Center for Possibilities
\$7,847.20

Cesare Battisti Lodge 27
\$2,900.00

Challenger Learning of NWI
\$32,278.00

Colorectal Cancer Alliance
\$10,000.00

Community Help Network, Inc.
\$3,000.00

C (continued)

Crisis Center
\$71,405.50

Crossroads YMCA
\$58,983.00

**Crown Point
Community Foundation**
\$2,500.00

D

Diocese of Gary
\$11,976.00

**Doctors Without
Borders, USA**
\$1,000.00

**Dunes Dog
Training Club, Inc.**
\$5,000.00

Dunes Learning Center
\$20,382.53

E

Earth Charter Indiana
\$16,000.00

Empower Schools
\$35,000.00

Erin's Farm NFP
\$3,245.31

E (continued)

**Exceptional Equestrians
Unlimited**
\$7,133.67

F

Faith Church
\$578.00

**Families Anchored
in Total Harmony**
\$24,656.71

**Family Life Community
Youth Center**
\$3,250.00

**Feline Community
Network**
\$3,245.31

Fight Club Survivor, Inc.
\$2,000.00

**First Presbyterian
Church of Naples**
\$27,000.00

**First Unitarian
Church of Hobart**
\$4,235.00

**First United Evangelical
Lutheran Church**
\$37,500.00

F (continued)

**First United Methodist
Church of Crown Point**
\$8,152.80

For the Love of the Arts, Inc.
\$7,800.00

**Force For Good
Community Development
Corporation**
\$5,000.00

Forest Ridge Academy, Inc.
\$1,100.00

**Franciscan Health
Foundation, Inc.**
\$4,000.00

**Franciscan Health,
Crown Point**
\$10,639.00

Fried's Cat Shelter, Inc.
\$3,295.16

**Friends of Jose De Diego
Community Academy**
\$1,000.00

**Friends of the Crown Point
Community Library**
\$5,652.80

G

**Gabis Arboretum at
Purdue Northwest**
\$1,140.00

**Gary Community
Partnership**
\$3,250.00

**Gary East Side Community
Development Corporation**
\$10,000.00

**Gary International
Black Film Festival**
\$750.00

**Gary Public
Transportation Corp.**
\$19,549.00

**Gary Shakespeare
Company**
\$4,000.00

**Greater Hammond
Community Services, Inc.**
\$2,000.00

**Greek Orthodox Church
of Saint Demetrios**
\$1,000.00

**Guaranteed Income
Validation Effort, GIVE**
\$50,000.00

H

**Habitat for Humanity of
Northwest Indiana, Inc.**
\$8,251.00

**Hammond Community
Corporation**
\$61,721.00

**Hammond Education
Foundation, Inc.**
\$18,729.00

Haven House
\$17,347.20

**Highland Community
Foundation, Inc.**
\$600.00

**Highland Orchestra
Boosters, Inc.**
\$100.00

**Hilltop Neighborhood
House**
\$1,000.00

**Hinton & Williams
Funeral Home, Inc.**
\$2,000.00

**Hobart Community
Foundation**
\$13,049.00

H (continued)

Hobart Family YMCA
\$2,670.70

Hobart Food Pantry, Inc.
\$53,282.25

Hobart Historical Society
\$7,061.00

HOBY Indiana
\$1,200.00

Holistic Evolution, Inc.
\$500.00

Honor Flight Chicago
\$2,000.00

Hope for Humanity, Inc.
\$1,000.00

**Hospice of the Calumet
Area, Inc.**
\$21,128.92

Humane Indiana, Inc.
\$16,723.00

**Humane Society
of Hobart, Inc.**
\$705.00

I**Independent Cat Society, Inc.**

\$1,000.00

Indiana Audubon Society

\$1,000.00

Indiana State Literacy Association

\$750.00

Indiana University Foundation

\$688,000.00

ITOWN Ministries, Inc.

\$4,000.00

Ivy Tech Foundation, Inc. - Northwest Indiana

\$6,163.00

J**Jacob's Ladder Pediatrics**

\$8,829.00

Junior Achievement of Chicago

\$520.00

L**La Lumiere School, Inc.**

\$1,000.00

L (continued)

Lake County Community Services, Inc.

\$7,500.00

Lake County Fairgrounds

\$2,826.40

Lake County Public Library

\$9,580.80

Lake Court House Foundation, Inc.

\$2,826.40

Lakeshore Public Media

\$11,177.00

Lowell Public Library

\$8,838.00

Lutheran Life Communities Foundation

\$5,652.80

Lymphira, Inc.

\$25,000.00

M**MAKS Corp.**

\$5,000.00

Maria Reiner Center

\$98,627.36

M (continued)

Marquette University

\$5,000.00

Maryknoll Sisters of St. Dominic, Inc.

\$4,790.40

Mayo Clinic Foundation

\$9,580.80

Meals on Wheels of NWI

\$40,084.30

Mental Health America

\$12,500.00

Mercy Ships

\$500.00

Miller Beach Arts & Creative District

\$7,760.00

Miller Beach Tourism Bureau, Inc.

\$33,220.00

Miller Citizens Corporation

\$14,598.78

Miller Community Fund

\$16,805.30

Miller Garden Club

\$342.77

M (continued)

Mission Aviation Fellowship

\$1,000.00

Mobility Ministries, Inc.

\$1,000.00

Morning Bishop Theatre Playhouse, Inc.

\$5,000.00

Mount Mary University

\$2,395.20

Mr. John Grigsby's Memorial Park LTD

\$1,000.00

N**Nelson Algren Museum of Miller Beach**

\$395.30

Northwest Indiana Cancer Kids Foundation, Inc.

\$5,000.00

Northwest Indiana Community Action

\$500.00

Northwest Indiana Symphony Society, Inc.

\$9,539.00

N (continued)

NWI Volunteer Lawyers, Pro Bono Indiana, Inc.

\$10,526.00

O**Operation Combat Bikesaver**

\$5,000.00

Opportunity Enterprises, Inc.

\$25,606.80

P**Pacific Garden Mission**

\$2,940.00

Paladin, Inc.

\$6,106.00

Pathway to Adventure Council, Boy Scouts of America

\$11,153.00

Planned Parenthood Great Northwest, Hawaii, Alaska, Indiana, Kentucky

\$971.00

Portage Township YMCA

\$100.00

Porter Starke Services, Inc.

\$3,000.00

P (continued)

Powell-Coleman Funeral Home

\$1,500.00

Project Outreach and Prevention on Youth Violence Foundation

\$20,000.00

Prom Genie, Inc.

\$1,000.00

Providence Cristo Ray High School

\$7,500.00

R**Resilia**

\$25,000.00

Ridge United Methodist Church

\$2,543.00

S**SAFE Coalition for Human Rights**

\$7,000.00

Samaritan Counseling Center

\$1,129.00

Samaritan's Purse

\$1,000.00

S (continued)

**Save The Dunes
Conservation Fund**

\$1,899.00

School City of Hammond

\$1,500.00

School City of Hobart

\$2,670.70

**School City of Hobart
Educational Foundation**

\$2,214.00

ShelterBox USA

\$1,000.00

Sheltered91

\$9,500.00

**Shirley Heinze Land
Trust, Inc.**

\$67,345.65

**Shriners Hospital
for Children**

\$500.00

**Sixteen Pearls
Foundation, Inc.**

\$20,000.00

Smile Train, Inc.

\$1,000.00

**Sociedad Cultural Y
Civica La Reforma**

\$1,500.00

**Society of Innovators at
Purdue Northwest**

\$2,000.00

Sojourner Truth House

\$29,194.20

South Shore Arts, Inc.

\$58,431.54

**South Shore Convention
& Visitors Authority**

\$10,000.00

**St. Iakovos Greek
Orthodox Church**

\$50,000.00

**St. John the Baptist
Catholic Church**

\$2,345.00

**St. Jude Children's
Research Hospital**

\$500.00

St. Jude House

\$2,500.00

St. Mary Catholic Church

\$1,000.00

St. Michael's Parish

\$5,000.00

T

The Caring Place, Inc.

\$10,000.00

The Cavaliers AP&E, Inc.

\$7,152.00

The Father's Heart Church

\$500.00

**The First Tee of Hammond,
Hammond Youth Golf
Academy Inc.**

\$7,945.00

**The MAAC
Foundation, Inc.**

\$13,263.00

**The Methodist Hospitals
Foundation Inc.**

\$13,389.00

The Navigators

\$500.00

The Night Ministry

\$177.54

The Rotary Foundation

\$500.00

**The Salvation Army
Northwest Indiana
Area Command**

\$7,841.00

T (continued)

**The Society for the
Restoration of the Gary
Bathing Beach Aquatori-
um & Chanute's Place
in History**

\$250.18

**The Trinity Baptist
Church of Gary Indiana**

\$12,550.00

Theatre at the Center

\$177.00

Top 20, Inc.

\$3,000.00

Towle Theater

\$5,772.00

Town of Dyer

\$578.00

**Town of Griffith
- Parks & Recreation**

\$914.00

**Town of Griffith
- Police Department**

\$26,424.00

Town of Merrillville

\$750,000.00

Town of Munster

\$2,075.00

Tradewinds Services, Inc.

\$111,099.50

Tri Town Safety Village

\$842.00

**Trinity Lutheran
Church and School**

\$106,564.50

**Trustees of Purdue
University**

\$3,000.00

U

UNICEF USA

\$500.00

**United Charitable
- Athletes for Charity**

\$5,000.00

**United Way of
Northwest Indiana, Inc.**

\$16,567.00

**Urban League of
Northwest Indiana, Inc.**

\$11,150.00

V

VicTory 4 Kidz

\$10,701.00

VNA of Porter County

\$49,282.25

W

We Are The Village, Inc.

\$1,500.00

**Westminster
Presbyterian Church**

\$1,251.00

**White's Residential and
Family Services, Inc.**

\$500.00

Whiting Entertainment Center

\$10,000.00

**Whiting/Robertsdale
Comm Improvement Corp.**

\$5,205.00

WJOB/Vasquez Broadcasting

\$3,875.00

**Woodland Child
Development Center**

\$30,000.00

**World Wildlife Fund
U.S. Headquarters**

\$177.00

WTTW11

\$177.00

Unrestricted Funds

American Savings FSB Fund
 Beth Radigan Memorial Fund
 Betty J. and Dick J. Sterk Fund
 Carolyn Saxton Fund
 Catherine and Calvin Bellamy Fund
 Catherine Riley Boege Community Fund
 Chase Fund
 Cicco Family Memorial Endowment
 Cindy J. Hall Unrestricted Fund
 Cyril Sandala Fund
 Dean and Barbara White Fund
 Francis Meyer Family Fund
 Fred and Judith Van Senus Memorial Fund
 Fredricka Cooper Davidson Advised Fund

Gammon Foundation Unrestricted Fund
 HFS Bank Fund
 Irene M. Mateja Charitable Fund
 Jack S. and Frances S. Killen Fund
 James H. and Mary Ann Greiner Fund
 James L. and Prudence Dandurand Fund
 Lake County Community Fund
 Leonard and Mildred Millies Fund
 Louise and Bancroft Yarrington Fund
 Margot and Glenn Clark Unrestricted Endowment
 Morrow Family Fund
 Nancy and Allen Johnson Fund
 Nicholas J. Pangere Memorial Fund
 Nick Anoe Memorial Fund
 Peoples Bank Fund

Richard A. Gordon Memorial Endowment Fund
 Robert and Barbara Gasser Fund
 Ruth Cornwell Fund
 Sandra M. Hynek Unrestricted Fund
 Terry Conley Memorial Unrestricted Fund
 Timothy W. Raykovich, MD Fund
 TrueWealth Advising Group Endowment
 Webster Cornwell Fund
 Wilbert and Olga Seehausen Fund
 William and Diane Payne Fund

Donor Advised, Agency, and Field of Interest Funds

2076 Tri-Centennial Memorial Fund
 A Bunch of Responsible Guys Fund
 Alexandra Gardner Riddle Fund
 Klare E. and Marvin L. Anderson Scholarship Fund
 Anonymous Scholarship (Goldman, Sachs and Co.)
 ARC Fund for Developmental Disabilities
 Association for the Wolf Lake Initiative Fund
 Austgen Family Foundation Fund "In Memory of Ronald E. Austgen"
 AWLI Land Trust Fund
 Bank Calumet Fund (Calumet College)
 Barbara A. Gross Hobart Betterment Fund
 Betty and Dick Sterk Donor Advised Fund
 Betty Dye Memorial Fund
 Books, Brushes, & Bands for Education Fund
 Boys & Girls Club of Greater NWI
 Boys & Girls Club of NWI Indiana Fund
 Bryce Scott Handley Memorial Fund
 Calumet College Fund
 Calumet College of St. Joseph Endowment Fund
 Campagna Academy, Inc.
 Cara M. Spicer Fund
 Catherine Riley Boege Donor Advised Fund
 Catholic Charities Diocese of Gary, Inc.
 Cavalier Drum and Bugle Corps Fund
 Chad and Margaret Kollross Fund
 Challenger (Hammond Schools) Learning Center of NWI Endowment Fund

Challenger Spark Your Imagination Fund
 Challenger/ St. Mary's - Griffith Fund
 Challenger/Griffith School Corporation 3rd grade Fund
 Challenger/Griffith School Corporation Challenger Fund
 Challenger/Highland School Corporation Endowment Fund
 Challenger/Hobart School Corporation Fund
 Challenger/Lake Station School Corporation Challenger Fund
 Challenger/Merrillville School Corporation
 Chase Fund (Calumet College)
 Chase Fund (Ivy Tech State College)
 Chase Fund 2 (Ivy Tech State College)
 Chris and Dede Morrow Fund
 Christian Church Financial Education Endowment Fund
 Christopher Lindroth Fund
 Christopher M. Morrow Family Fund - Non Perm
 Clare and Lucy Oesterle Fund
 Cohen Family Designated Endowment Fund
 College Readiness Endowment Fund
 Collis C. Hooks Designated Non-Permanent Fund
 Crisis Center Inc. Endowment Fund
 Crossroads YMCA Hammond Capital Project Fund
 Cynthia R. and Mamon M. Powers, Jr. Advised Pass Through Fund
 Dana Rifai Fund
 Dean and Barbara White Community Center Capital Improvement Fund

Dean and Barbara White Community Center Fund
 Dennis and Amy Han Donor Advised Fund
 Diane and Terry Eich Fund
 Donald R. and Violet Hayes Wray Memorial Endowment for the NWI Symphony
 Dr. Leo and Arlene Cooper Fund for Catholic Charities
 Drifting Dunes Girl Scout Council Endowment Fund
 Dunes Learning Center Education Fund
 Dyer Community Foundation Fund
 East Chicago Katherine House Boys & Girls Club Capital Improvement Fund
 Edith L. Sonntag Living Trust Fund
 Elin Christianson Hobart Historical Society Endowment Fund
 Endowment Fund of YMCA of the Hammond Area
 Environmental Fund for Lake County
 Exploring Our Community Fund
 First Responders Training Fund: The MAAC Foundation
 Forging Futures Fund
 Franciscan Alliance, Inc. Fund
 Franciscan Sisters of Chicago Service Corp. Fund
 Frank and Brenda Rizzo Fund
 Frank Wright Memorial Fund
 Fred and Judith Van Senus Charitable Endowment
 Friends of Marquette Greenway NWI Fund
 Friends of Marquette Park Fund of Miller Citizens Shoreline Committee
 Friends of Planned Parenthood Lake and Porter County
 Friends of the Gary Air Show
 Fundamentals First Fund
 Gabis Arboretum at Purdue NW Fund

Cicco Family Memorial Endowment Fund

The fund was created to honor the life of Theresa Ann Cicco, after her 18-month battle with stage IV ovarian cancer.

A devoted mother, grandmother, and sister, Theresa was known for her kind heart, sweet smile, and connection to the community. As a business owner in Lake County, she developed a connection with her customers. Her warmth and generosity touched countless lives in a remarkable way.



Leave a Lasting Legacy

You too can leave a lasting legacy that honors your loved ones and contributes to the betterment of Lake County, both now and in the future. Because of the Cicco Family Fund, Legacy Foundation will be able to make grants that support our communities' greatest needs.

Funds continued

Gardner Salon Show Prize Fund

Gary and Sandy Neale Fund

George A. Rogge and Susan M. Rutsen Miller Beach Fund

George A. Rogge RMD Birthday Gift Fund

George and Harriet Korellis Roofing Memorial Fund

Glen E. Bacus Fund

Glen Gaby Foundation for the Betterment of Griffith Fund

Gloria Hubacek Duckworth Fund

Good Samaritan Endowment Fund of Lake County

Good Teachers Count Fund

Great Lakes Aquatic Habitat Fund

Gwendolyn Sargent Fund for East Chicago Katherine House Boys & Girls Club

Hammond Community Corporation, Inc. Endowment Fund

Hammond Community Corporation, Inc. Fund

Hammond Education Foundation Fund

Hammond Public Library Fund

Hammond Youth Golf Academy Endowment Fund

Harry Lucaitis Memorial Fund

Hearing Accommodation and Research Fund

Highland Community Foundation Fund

Hobart Anonymous Donor Fund

Hobart Community Fund - sponsored by HIEDC

Hobart Educational Foundation

Hobart Family YMCA Endowment Fund

Hobart Unitarian Church Endowment Fund

Hospice of the Calumet Area Endowment Fund

Humane Indiana

Indalecio L. and Celia C. Ruiz Fund

Indiana Dunes Environmental Learning Center Fund

Jack and Sara Dietrich Fund

James and Linda Martin Community Endowment Fund

James F. Van Senus Memorial Fund

James Van Senus Camp Quality Endowment Fund

Jerome J. Gross and Dorothy J. Gross Fund

JoAnn and Chuck Long Endowment Fund

John and Helen Sourlis Endowment Fund

John and Myrna Newgent Stewardship Program Fund

John S. and James L. Knight Foundation Donor Advised Fund

Junior Achievement (Northwest Indiana) Fund

Karen Monaldi Memorial Fund

KGGS Charitable Fund

Kreitzburg Cemetery Fund

Kyle and June Grady Fund

Laini Fluellen Charities Inc.

Lake Central Dollars for Scholars Fund

Lake County Advancement Committee

Lake County Community Sponsorship Fund

Lake County Early Childhood Fund

Lake County Literacy Fund

Lake County Local Food Fund

Lake County Public Library Fund

Lake County Veterans (VTC) Court Endowment Fund

Lake County Veterans Court Support Fund

Lake County Youth Fund

Lakeshore Public Media Fund

Lauer Family Fund

Lee Botts Environmental Education Fund

Legacy Learning Lab Fund

Legacy Women's Philanthropy Endowment

Linda and Myron Nidetz Salon Prize Fund

Lois Rhinesperger

Lowell Public Library Endowment Fund

Mabel McCants/NWI Symphony Fund

Mabel McCants/Planned Parenthood Fund

Margaret and Victoria Ozimec Fund

Maria Reiner Senior Center Fund

Maria M. Reiner Senior Citizens Fund

Marjorie A. Mills Fund

Mary Anne Hannah Fund

Mary G. White Fund

Mary J. Manos Endowment Fund

Mary Magdalene Lopez Fund

McMahon Charitable Advised Fund

Meals on Wheels of NWI, Inc. Fund

Merrillville Education Foundation Fund

Merrillville Parks and Recreation Fund

Michael W. Tuohy Indiana Ballet Theatre NW Endowment Fund

Miller Community Fund

Mission Journey Fund

Munster High School Speech and Debate Team Assistance Fund

N.L. Trusty History Graduate Research Award

Nancy and Richard Clifford Charitable Fund

Nancy and Richard Clifford Donor Advised Fund

Nancy K. Johnson Advised Fund

Nancy Snider Educational Endowment Fund

Nancy Snider Memorial Fund

New Star Fund

NIPSCO Endowment Fund

Norma J. and John M. Cain, Jr. Fund

North Township Veterans Support Fund

NWI BizHub

NWI Habitat for Humanity Fund

Officer Jerry Volom D.A.R.E Fund

Olga C. and William H. Brinkman Fund

Orval O. and Margaret Haag Salon Show Fund

Palmer C. Singleton, Jr. Fund

Pamela Meyer Yttri Donor Advised Fund

Pathways to Adventure Boy Scout Council Fund

Patricia and Durward Schuetz Endowment Fund

Patricia Merrell Memorial Transportation Fund

Patrick M. and Judith A. Dow Endowment

Peg Ozimec Fund

Peoples Bank Charitable Fund

Pope Family Fund

Prasco Family Fund

Rebuilding Together of South Lake County

Remote Area Medical "R.A.M." Fund

Richard W. and Wanda L. Gardner Endowment Fund

Rise NWI Fund

Rob Gardiner Legacy Fund for Boys & Girls Club of Greater NWI

Robert and Nancy Anadell Fund

Ruth Cornwell/Boys & Girls Club - Hammond Club

Ruth E. Cornwell Fund

Sally J. Benson Memorial Fund for Humane Indiana / Independent Cat Society



Jamika Smith, Teen's Legacy

Salvation Army NWI Area Command

Sandi Kozlowski Memorial Fund

Save the Dunes Conservation Fund

School Teachers' Fund

Scott Champion Fund

Seehausen/Boys & Girls Clubs of NWI Fund

Shirley Heinze Land Trust Fund

Sojourner Truth House Endowment Fund

South Shore Arts Fund

South Shore Arts Regional Award for Young Artists Fund

South Shore Arts Symphony Advancement Fund

St. John the Baptist Church Fund

St. John the Baptist Church Organ Fund

Stay for Supper Fund

Sue Crisman Kindness Endowment Fund

Sunny Medved Memorial Fund

Susan M. Rutsen Fund

Sylvia M. Komyatte - Hospice of the Calumet Area Endowment Fund

Tammy Pavlowski Trust - Pet Fund

Thomas and Joanne Nastoff Fund

Thomas and Joanne Nastoff Goodwill Fund

Thomas Ray Crowel Fund

Tom Sourlis and Sue Eleuterio Donor Advised Fund

Tri Town Safety Village Fund

United Way of Northwest Indiana Fund

USX Foundation Fund (Ivy Tech)

Valparaiso University Fund

Verne P. Seehausen Donor Advised Fund

Victor and Faith Davis Endowment Fund

Visiting Nurse Endowment Fund

Westminster Presbyterian Church Fund

Whiting/Robertsdale Community Improvement Corp. Endowment Fund

YWCA of Gary Fund

Scholarships

Building the Future Scholarship

Legacy Foundation's first scholarship dedicated to supporting students pursuing a trade or vocational education.

The Building the Future Scholarship was established in 2023 to support Lake County residents. The application is open to high school seniors, GED graduates, current students and adults returning to education. Students may pursue a wide range of careers such as culinary arts, cosmetology, healthcare, automotive technology, computer certifications, or any other vocational field. Legacy is excited to contribute to the thriving workforce of Lake County, Indiana!



Melanie graduated in December 2023 and is studying for the NCLEX-Nursing License exam.

"I would like to thank the many donors that helped not only me, but other students with scholarships. It is such a privilege to be chosen for this reward. It means a lot to me, and now I can go to school without worrying about paying for books out of pocket. I am now closer to becoming a Licensed Practical Nurse because of this opportunity."

- Melanie Calvillo
Recipient of Building the Future Scholarship

Town of Merrillville Scholarship

The Town of Merrillville Inclusion Scholarship was established in 2023 and was funded through proceeds from the Inaugural Black History Celebration Dinner held that year. Four scholarships were awarded in the first year. To apply, students must be graduating high school seniors from Andean or Merrillville High School and must be accepted into a 2 or 4-year accredited college or university, vocational, or trade school. Students must demonstrate financial need and commitment to their school and community.

Scholarship Recipients

Victoria Piskol • Christian Sabbath • Janiya Milton



Scan to Read More

Scholarship Recipients

- | | | | | |
|----------------------|---------------------|------------------------|--------------------------|------------------------|
| Diego Arriaga | Alexandra Crenshaw | Cooper Gregar-Skillman | Kaylyn Lee | Ashton San Miguel |
| Arely Aguilar-Prieto | Zachary Crizer | America Guerrero | Zoe Lenze | Mia Sarkey |
| Olivia Aichner | Twila Dale | Jessie Guillen | Bradley Loden | Keyonna Shamble |
| Citlaly Almaraz | James Davis | Alexandria Gust | Jacob Mabus | Salvatore Smith |
| Savanah Amschl | Kenjie DeCastro | Elizabeth Guzman | Camila Marquez | Morgan Smith |
| Isabella Andriessen | Olivia Decker | Stephanie Harden | Sophia Martin | Charles Smith |
| Bridget Armond | Mason Deering | Danielle Hargreaves | Isaac Martin | Geneva Smith |
| Eranique Armstrong | Christian DeMouille | Paige Harrison | Erica Maya | Christopher Somervell |
| Karla Arreguin | Madelyn Denklau | Zachary Hart | Christa McGee | Mikayla Southwell |
| Jazmin Avila | Israel Diaz | Jomar Henderson | Casey McNulty | Peyton Specht |
| Jade Bailey | Isabella Dietrich | Devin Henry | Nathan Middlebrook | Shirnice Spence |
| Callista Baim | Grace Dixon | Mirabellah Hernandez | Jenna Miller | Nathan Splant |
| Jackson Bakker | Katlyn Dolata | Sarah Hestermann | Janiya Milton | Alan Stirling |
| Dara Barach | Sean Dorsey | Annalise Hillary | Megan Moloney | Maizy Swanson |
| Donovan Baran | Shane Dorsey | Andrew Holbrook | Jason Moore | Ashley Taylor |
| Joel Barnes | Johnny Dowdell | Coralie Humbert | Angel Nevarez | Colby Tieri |
| Carolina Barragan | Alexis Dres | Kaylee Jackson | Braelynn D Norwood | Gabrielle Tomich |
| Trinity Belford | Alex Duvnjak | Kyle Janda | Sarah O'Farril | Victor Torres |
| Kylie Bell | Andrew Dyba | Lauren Jefferies | Maggie Oksimowicz | Emmanuel Torres |
| Mya Bell | Rylee Elkins | Brooklyn Johnson | Jacqueline Orozco | Nayeli Torres |
| Josephina Bontempo | Keith Ellis | Alicia Jones | Marianna Oxendine | Alyssa Toscani |
| Averi Borders | Alan Enriquez | Farah Kakish | Emma Padilla | Mark Tripenfeldas |
| Ava Brannon | Courtney Epler | Kendallyn Katona | Thomas Pagan | Luke Van Baren |
| Kristin Bribiesca | Payton Ericksen | Anthony Katona | Joshua Palma | Erick Vazquez |
| Melanie Calvillo | Isabel Esparza | Riley Kelly | Isidora Pavlic | Alejandro Velasco |
| Nayelli Campos | Sarah Espiritu | Jasmine King | Angela Perez | Aileen Verdoza-Luevano |
| Rebecca Carlos | Lauren Feder | Josephine Kissel | Whitney Peterman | Juan Villanueva |
| Ally Carlson | Ahmya Fields | Lazo Knezic | Victoria Piskol | Amanda Vis |
| Antonio Carranza | Maria Fierro | Jessica Kohut | Marguerite Ponda | Darren Waclawik |
| Michaela Chandler | Madison Fleming | Walter Kotlin | MariaEmilia Quiroga | Amelia Wetnight |
| Alexander Cioroianu | Hannah Flewelling | Samantha Kristoff | Mariaangela Ramos Vargas | Kaitlyn Whitaker |
| Alexandria Cline | Daniela Gallegos | Kathleen LaPorte | Mikayla Rebeles | Megan Whitford |
| Janeea Cole | Nasiya Gause | Austin Lawrence | Raeann Risos | Cheyenne Whitt |
| Sari Concepcion | Marianne Gerona | Joseph Lay | Elysa Roldan | Emma Williams |
| Aidan Conley | Israel Gibson | Selah Lee | Helena Ruiz | Madison Worosz |
| Madelynn Coy | Emani Goston | | Christian Sabbath | Lucas Wright |
| | | | Anthony Saberniak | Cristian Zarco |
| | | | Nataly Salas | Anneka Zylstra |

Scholarship Funds

Barbara Miller Meeker Art Scholarship
 BCC Edward L. Burke Law Scholarship
 Bi-Centennial Memorial Scholarship
 Bill and Sue Modrak Scholarship
 BP Products North America Scholarship
 Broadway Scholarship
 Building the Future Vocational Scholarship
 Cara M. Spicer Scholarship
 Cenifax Scholarship
 Continuity of Care Scholarship
 Crossroads Chamber of Commerce Scholarship
 Daniel Chavez Memorial Scholarship
 Demetrius Tirrell Williford Memorial Scholarship
 Dr. William and Margaret Morris Academic, Athletic, & Service Scholarship
 Dream Catcher Scholarship
 Fred and Louise Latshaw Scholarship
 George and Harriet Korellis Memorial Scholarship
 Gerritsen Scholarship
 Halfacre Excellence in Music Scholarship
 "in memory of Dennis Halfacre and Sandra Halfacre Moore"
 Hammond City Council Scholarship
 Hanover Central High School Scholarship
 Herbert R. Kocher Memorial Scholarship
 Highland Orchestra Scholarship
 IBEW Local Union #697 Memorial Scholarship
 Indiana Pandemic Poetry Project Scholarship
 James F. Van Senus Swimmers Team Spirit Award Scholarship
 Jeff Van Hecke Memorial Scholarship
 Joan and Ernest S. Berry Scholarship
 John V. and George Primich Family Scholarship
 John W. Anderson Foundation Scholarship
 Joseph and Evelyn Skora Scholarship
 Joseph and Marla Dernay Future Teacher Scholarship
 Joseph T. Morrow Urban League Scholarship
 June Pangburn Memorial Scholarship Fund

Kathy Lynn Hooks Non Permanent Memorial Scholarship
 La Lumiere School Scholarship
 Lake County Athletic Officials Association Memorial Scholarship
 Lake County Bar Association Scholarship
 Lake County Fish and Game Scholarship
 Lakeshore Chamber of Commerce, Van Til / Bellamy Salute to Education Scholarship
 Latinos Count Northwest Indiana Scholarship
 Legacy Foundation Unrestricted Scholarship
 Legacy Scholarship Endowment
 Legends Scholarship
 Mardie Tuttle Thrive Scholarship
 Mary Francis Textbook Scholarship
 Milton and Ruby McClendon Memorial Scholarship
 N.L. Trusty History Graduate Research Award Scholarship
 Norah Salt Scholarship
 O'Shea Patrick McCarthy Scholarship
 Peoples Bank Scholarship
 Philippine Professionals Association Scholarship
 Rachel Rodriguez Memorial Scholarship
 Robert E. Rainsberger Purdue University Northwest Advised Scholarship
 Robert E. Rainsberger Scholarship
 Robert L. Burdan Memorial Scholarship
 Roger Begnoche Scholarship
 Ronda Worden and Esther Henning Scholarship
 Schrage Family Enrichment Scholarship
 Scott Champion Scholarship for Special Education Teachers
 Sengupta Family Scholarship
 The Dr. John T. Scully Medical Scholarship
 The Dr. R.T. White Scholarship
 The Four Girls Scholarship
 The Good Teachers Count Scholarship
 Town of Merrillville Inclusion Scholarship
 Vic Sahagun Scholarship
 W. James Spicer Scholarship
 Webster Cornwell Scholarship



Scholarship Alumni Event

Legacy Foundation scholarship recipients gathered for networking and a volunteer activity! The group packaged care kits for residents at Brother's Keeper men's shelter located in Gary, IN. They also heard from Executive Director Isaac Mootye as he expressed the organization's impact on our community.



Scholarship Reviewers

Gail Anoe	Nancy Hamblin	Michael Rodriguez
Eran Armstrong	Bill Hart	Ginger Rodriguez
Regina Beard	Suzie Hartman	Lance Russell
John Beebe	Shemia Jackson	Cynthia Marie Sabo-Jones
Suzy Birdsall	Joan Kateiva	Megan Sikes
Thomas Bona	Judy Katz	Marilyn Simpson
Ebony Brown	Becky Korellis	Barbara Sofianos
Natasha Brown	Jack Kraus	Shanita Starks
Nina Burton	Lauren Lauer	Judith Stoll
Sheila Chandler	Julia Long	Nikki Templin
Christine Cid	AnnMarie Madera	Shelice Tolbert
Rosalinda Ciesielski	Mary Kathryn Malone	Mardie Tuttle
Valerie Daniels	Marc Malone	Barry Tyler
Brynn Denton	Morgan McCabe	Sonda Vasquez
Samantha Eaton	Heather McCarthy	Gerica Vega
Sean Egan	Ericka McCauley	Terri Weems
Riley Egan	Barbara Meeker	Deborah Weiss
Tiffani English	Sherri Modrak	Kim Whalen
Helen Engstrom	Charlene Newhuis	Keisha White
Alfredo Estrada	Lindsey Palascak	Sarah White
Sarah Ferraro	Rosa Peña	Ashley Wiater
Jaqueline Fowler	Laura Reid	Tiffany Williford
Celeste Garcia	Brad Remmenga	Jennifer Wilson
Josephine Gomez	Kelley Renz	Kim Yelich
Diane Gordon	Jeff Rhody	
Eric Griffin		
Bessie Halfacre		



Staff

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President & CEO



Eranique Armstrong
Marketing & Comm. Coordinator



Kelly Baer
Grants Coordinator



Donna Catalano
Outreach & Engagement Manager



Rose Cyphert
Finance Services & Operations Director



Maranda Fishback Engquist
Grants & Partnerships Director



Jodi Kateiva
Scholarship Administrator



Erica Fizer Katsepas
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Elizabeth Palacio
Equity Outreach Coordinator



Michelle Ulanowski
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The Heart of Lake County

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Lisa Goodnight
Purdue University Northwest



Gregory A. Gordan
Centier



Stephen P. Kavois
Oak Partners



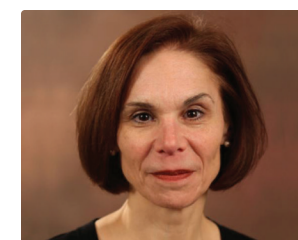
Gloria Morris
Float Sixty Corp, Google,
Great Lakes Sports Hub



Pam Ott
Franciscan Alliance



Verlie Suggs



Ellen Szarleta
Center for Urban & Regional
Excellence, Indiana University NW



Phil Taillon
South Shore CVA



Chelsea Whittington
C WHITT PR



Richard Young
Swartz Reston



Sherri Ziller
NWI Regional Development Authority



Robert Johnson
Director Emeritus

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 Karima Hasan Bey

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 Emily Edwards
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 Gloria Morris
 Deann Patena
 Victor "Tory" Prasco
 Verne P. Seehausen
 Joseph Skibbie

Financials

Assets	2023	2022
Cash and cash equivalents	\$6,685,190	\$5,150,276
Other assets	\$122,942	\$47,855
Construction in progress	\$140,750	\$23,800
Pledges receivable, net	\$3,901,748	\$5,766,939
Right of use asset	\$62,134	\$129,916
Investments	\$73,384,293	\$64,502,878
Property and equipment, net	\$24,784	\$83,990
Total	\$84,321,841	\$75,705,654

Liabilities	2023	2022
Accounts payable	\$141,789	\$65,083
Accrued expenses	\$24,633	\$13,368
Grants payable	\$151,573	\$331,304
Right of use liability	\$62,134	\$129,916
Annuities payable	\$336,443	\$342,302
Custodial funds	\$10,190,884	\$9,093,586
Total	\$10,907,456	\$9,975,559

Net Assets	2023	2022
Without donor restrictions	\$2,205,005	\$1,989,301
With donor restrictions	\$71,209,380	\$63,740,794
Total	\$73,414,385	\$65,730,095

\$84,321,841

\$75,705,654

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LEGACY FOUNDATION

Lake County's Community Foundation

370 East 84th Drive
Suite 100
Merrillville, IN 46410

 www.legacyfdn.org

 219.736.1880

Transforming Lake County
by providing strategic leadership
and impactful philanthropic
support to ensure equitable
opportunity for all communities
that we serve.

The
Heart
of Lake County

Annual Report



20
23