



Heritage Fund

2019 Annual Report

HERITAGE FUND: PHILANTHROPY IN ACTION

Heritage Fund reports each year on its activities. This report about 2019 is our way of making sure that you, a member of Bartholomew County, are able to see what your community foundation is doing with your very generous donations.

Yet as we prepare this report on last year, we are in the grip of the COVID-19 pandemic, and it is hard to think of anything else.

The Heritage Fund Board and staff have taken actions to respond in a fiscally responsible manner to the investment market downturn by reducing our operating costs. At the same time, we have a responsibility to respond to the dramatically increasing pain in the community. Finding that balance is a challenge.

This report, an example of that balance, is being sent in hard copy to only a small number of our closest donors and friends. A wider distribution of postcards directing people to the online version will round out our responsibility to be transparent in our actions to the broader community. We continue to look for other opportunities to reduce costs.

An article in *Columbus Magazine* described Heritage Fund as “Philanthropy in Action.” We are extremely proud of that description, and it has become a driving vision, especially during the COVID-19 crisis. We know our nonprofit community will be hit hard during this time of great need and reduced donations due to the instability being felt by everyone.

Nonprofits play an essential role in our community and Heritage Fund will be working to help those organizations survive and recover. We are able to offer support in difficult times like these only because of your very generous support throughout the years.

With much gratitude,



Tracy H. Souza, President & CEO



Photo by April Knox Photography

GRANTS

Because of the generosity and support of our local donors, in 2019 Heritage Fund was able to award 42 grants totaling \$727,129.07 to Bartholomew County nonprofits through the unrestricted Community Fund. Each nonprofit that received a grant went through a competitive grant application process overseen by a committee of Heritage Fund Board members and community volunteers responsible for reviewing applications to the Community Fund. Here a few of the grant recipients are highlighted:

Counseling Counts

The Counseling Counts program, a multi-year (2017-21) recipient of a Community Fund grant, has a vision “to develop a holistic systems approach to addressing the personal and social needs of all the district’s students.” Counseling Counts has placed 25 mental health clinicians in BCSC’s 17 schools and 522 new student clients are being served through the program. Some of the other benefits of the program include a new student support “help-line” being co-sponsored with the United Way of Bartholomew County to support students and their families, an increase in the “at-risk” senior graduation rate to 93 percent, life skills being taught to all first- and fourth-graders and a peer-to-peer mentoring program established at Columbus North High School and Northside Middle School.



Photo by Maika Shibata

25

MENTAL HEALTH CLINICIANS

17

SCHOOLS

522

NEW STUDENT CLIENTS

Columbus Homebuyer Program

The lack of affordable housing in Bartholomew County is a growing concern for local government, businesses and nonprofits. Conversations are happening around our community about how to provide safe, adequate shelter to people of all income levels and needs.

In 2019, Heritage Fund granted Southern Indiana Housing Community Development Corporation (SIHCDC) \$25,000 for the purchase of building supplies for C4 Building Trades Program students to build a new home on an Eighth Street property. While students work on the construction of the home, the Lincoln-Central Neighborhood Family Center assists in identifying potential homebuyers while First Financial Bank and Apprisen provide homeownership counseling to the candidates.

The Columbus Homebuyer Program brings together public, private and nonprofit organizations to facilitate opportunities for a new homeowner, counsels potential local homebuyers and promotes construction trades education. Heritage Fund is proud to be a part of these first steps toward neighborhood revitalization in the Lincoln-Central Neighborhood.

411 Community Studio

A Positive Change grant was awarded to Columbus Area Arts Council (CAAC) to support the design and buildout of the community studio at 411 Gallery, a transformation of an underutilized space into a flexible space for local and visiting artists to work, meet and collaborate. Since opening the community studio in August 2019, the CAAC has impacted 851 people, the majority being residents of Bartholomew County. This grant from Heritage Fund allowed CAAC to establish relationships with several community partners and helped to further their mission.



Photo by Hadley Fruits

‘Soul of Philanthropy’

Thanks to generous community members, Field of Interest Funds have been established at Heritage Fund to support specific charitable purposes. One example is The African American Fund of Bartholomew County, which funded the “Soul of Philanthropy” Exhibit that highlights the legacy of African American philanthropy in our community. About 20 individuals are honored in the physical exhibit, ranging from some of the county’s earliest African American residents to young activists of today. The exhibit opened in August 2019 at The Commons and has been on display at the Columbus Learning Center, Cummins, several schools and also has been made into a video.

HONORING

AFRICAN AMERICAN

PHILANTHROPY IN

OUR COMMUNITY

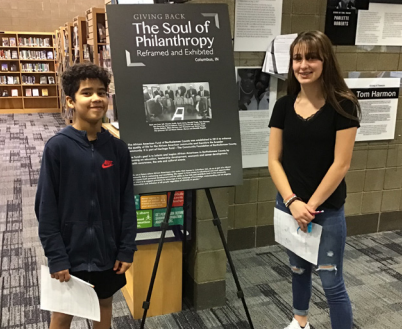


Photo by Robin Cain

SCHOLARSHIPS

More than 125 students benefited from the generosity of Heritage Fund scholarships in 2019, continuing our donors' both long-established and newly created legacies established in support of postsecondary education. Students were awarded more than \$600,000 in scholarships available for a myriad of educational endeavors, from attending favorite alma maters to pursuing particular fields of study – as well as honoring the memories of loved ones for whom many are named. In addition to our general scholarship program that is home to more than 90 funds, Heritage Fund also administers the Lilly Endowment Community Scholarship Program and our annual Brown Music Competition for high school musicians.

"As a medical student, I've accumulated quite a bit of educational debt over the years so it was a relief to have some of that burden taken off my shoulders. I feel fortunate and grateful to Heritage Fund, Dr. and Mrs. Probst, and Dr. Keith Bean for their support of my education. It's an honor I never expected but that I sincerely appreciate."

— Jonathan Alessi

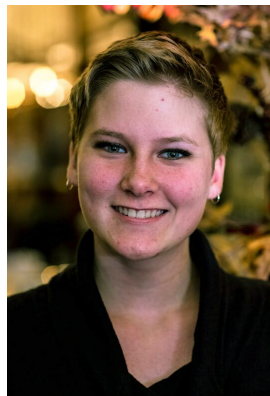
2019 Keith Bean Medical Scholarship and Dr. & Mrs. Edward L. Probst Medical School Scholarship recipient



"I am grateful for the support from Heritage Fund and the community to provide students like me opportunities to pursue higher education. I am thankful that organizations like Heritage Fund exist and support students following their dreams. I hope one day I can return the favor."

— Ruben Vizcarra Valdez

2019 Dave Galle Memorial Scholarship recipient



"Being a Heritage Fund scholarship recipient has opened many doors for me and has invited me into a network I would have otherwise never been a part of. As a Lilly Scholar, I am seen as a role model for my college. I thank you all for the opportunity."

— Riley Clark

2019 Lilly Endowment Community Scholar



PROGRAMS

Women's Giving Circle of Bartholomew County

In 2019, the Women's Giving Circle revised our mission: to educate, connect and inspire women to practice strategic philanthropy, using our collective strengths and financial resources to create positive change in Bartholomew County. In addition, a new look and initiatives were launched to create a more inclusive and strategic program.

The new initiatives that will continue in 2020 include:

Women in Crisis Micro-Loan Program

In partnership with Lincoln-Central Neighborhood Family Center, WGC provided grant funds to assist women in crisis. LCNFC identified women in need and worked to make small-dollar, high-impact loans with reasonable payment terms.

Bartholomew Co. Report Card for Women and Strategic Grantmaking

In order to better assess the needs of women in our community, WGC worked with strategic partners to collect key data on the status of women locally. Data will be shared with the community and used to define high-impact grantmaking from the WGC.

Women's Leadership Pipeline

WGC began to explore the creation of a leadership pipeline that will help to identify community leadership roles and how we can better connect local women with opportunities to lead.

WGC Empower Hour

These monthly gatherings increase our membership's knowledge about issues impacting women and families in our community.

Thanks to members of the WGC and our partners at Faurecia, more than \$10,000 in grants were made to launch the Women in Crisis Micro-Loan Program and to expand the "Turn the Page" project that saw books featuring empowering and inspiring women provided to our local middle and high schools.





EXHIBIT COLUMBUS

In 2019 Exhibit Columbus continued its celebration of architecture, art, design and community with the acclaimed exhibition “Good Design and the Community,” which featured 18 site-specific installations created by world-renowned architects and designers from across North America.

The 2019 exhibition provided a diverse platform for community engagement with more than 500 volunteers, including 400 Lincoln Elementary School students who participated in a planting day on Library Plaza, contributing 1,400 hours to help build installations. A dozen community organizations and local businesses also planned programs throughout the three-month exhibition that activated installations downtown, including a Spanish-speaking tour with Su Casa, dance performance by Ballet Folklórico, kick-off event for the Council for Youth Development’s Summit and ongoing agricultural care by the Columbus and Hope chapters of Future Farmers of America.

Exhibit Columbus expanded its commitment to educating the next generation by leading exhibition tours for more than 300 Central Middle and 80 Hauser Jr.-Sr. High school students, and more than 1,200 free Family Activity Guides were distributed directly to BCSC elementary school teachers with an additional 4,000 distributed through information hubs such as the Columbus Area Visitors Center and downtown merchants.

During Opening Weekend in August more than 300 people attended each day of the free exhibition conversations with the designers in North Christian Church and First Christian Church, and 700 guests from near and far celebrated together in Mill Race Park at the Opening Party. Seventy-five articles were published about the 2019 exhibition, many of which were in national and international publications such as *City Lab*, *Curbed*, *Dwell* and *The Architect’s Newspaper*.



Photos by Hadley Fruits



500+ VOLUNTEERS
1,400 HOURS TO HELP BUILD INSTALLATIONS

ANNUAL CAMPAIGN

‘Love Where You Live’

Inspired by our love for Bartholomew County and all that makes us proud to call this community home, Heritage Fund launched an annual campaign to benefit our Community Fund in 2019. Through this campaign, appropriately branded “Love Where You Live,” we hope to provide a yearly celebration of our community while giving donors the opportunity to give back to the projects, programs and organizations that make it so special.

Thanks to our generous supporters who truly “love where they live,” we raised more than \$100,000 to grow the Community Fund, increasing our 2020 grantmaking capacity to more than \$700,000.

Continuing to grow the Community Fund is critical to address new opportunities and changing needs in Bartholomew County. Community Fund grants since 1976 include rebuilding The Commons, pre-K initiatives, opioid abuse prevention and millions of dollars in support to our local nonprofit agencies.

The “Love Where You Live” Campaign featured a new design by local artist Laura Latham. Laura, daughter of Kami Adams and Joshua Latham, is a Columbus native and student at Columbus North High School.

We look forward to offering a new campaign with a new design in 2020!



“Designing the ‘Love Where You Live’ artwork for 2019 was truly an honor, and I was excited to show what I find special about our community. I love our architecture and our history, and I wanted to reflect this in the design. I thought about how to make the design personal but something that everyone can enjoy, just like our Columbus community.”

— Laura Latham
Artist and student at
Columbus North High School



The launch of the “Love Where You Live” annual campaign was held in conjunction with the 2019 Heritage Fund Reunion at Bartholomew County Historical Society.

Photos by Ali Elizabeth Photography



PLANNED GIVING

Leaving a gift to Heritage Fund in your will or by beneficiary designation is a great way to invest in the future of our community and make a lasting difference for the causes and organizations you care about.

We are proud to work with caring donors to develop a gift plan that honors an individual or family legacy while giving back in a meaningful way. We specialize in working with families and professional advisors to customize gift plans that fit every situation and donor preference. We also offer a wide array of funding options for your gift, including beneficiary designation, gifts from an IRA, bequests and more.

Want to include a charitable gift in your future plans? Contact us today.

Heritage Fund
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FUND HIGHLIGHT

AEI Youth Sports Fund

In 2019, former Board Member Angie May and her husband, David, approached Heritage Fund about helping kids participate in sports and athletic activities. They found a way to make that happen through their company, Analytical Engineering Inc.

The AEI Youth Sports Fund now provides additional access to athletic and fitness activities to youth with financial barriers to participation.

The fund distributes two types of grants annually – both for individuals and organizations with youth sports leagues.

Youth, parents, clubs, teams and others are eligible to apply for the grants that support youth ages 18 and under who reside in Bartholomew and surrounding counties. Grants are considered based on financial barriers to participation and include assistance for expenses such as lessons, clinics, travel, equipment, program fees and dues.

SPORTS GRANTS FOR INDIVIDUALS AND ORGANIZATIONS WITH YOUTH SPORTS LEAGUES



DONOR HIGHLIGHT



“We feel extremely fortunate that we grew up a part of this amazing community. We are now grateful that our children will grow up in a community that truly is welcoming, a community that embraces diversity, inclusion, and collaboration, a community that understands that to invest in itself, by any means, is an investment in the future successes of the community that we choose to call home. It is our privilege to be able to give back to a place that has given so much to our family already and as we grow into our future.”

— Mike & Melissa Wilson on why they give to Heritage Fund’s Annual Campaign

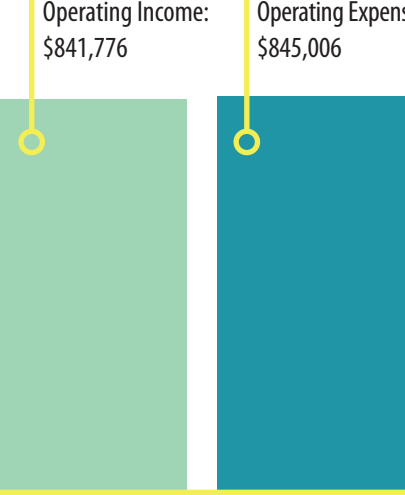
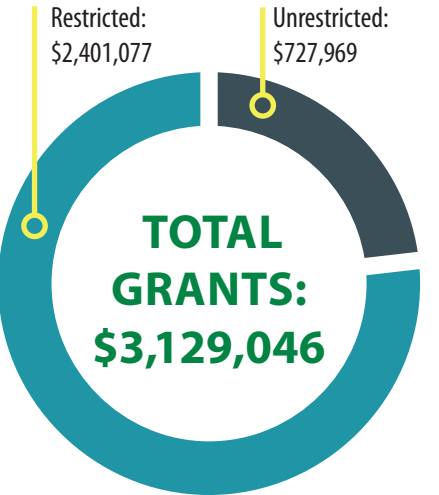


2019 FINANCIAL & INVESTMENT REPORT

TOTAL ASSETS:
\$78,792,612

TOTAL GIFTS RECEIVED:
\$3,770,188

SCHOLARSHIPS:
\$630,928
Heritage Fund Scholarships:
\$382,188
Lilly Endowment
Community Scholarships:
\$248,740



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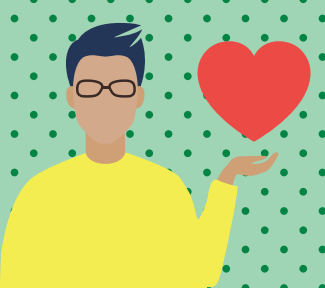
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Photo by April Knox Photography



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