

STRENGTHENING







LA PORTE COUNTY



NOW & FOREVER

2022 - 2023 Report to the community



Learn more about Unity's community leadership and impact with expanded

annual report content on our website.



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FROM OUR LEADERS

For over 30 years, Unity Foundation of La Porte County has remained dedicated to our mission of enriching lives and *Strengthening La Porte County Now and Forever*.

Through the leadership and generosity of visionary donors, Unity's assets have grown to more than \$40 million. Through the power of endowment, the fruits of these funds will be invested in La Porte County year after year...forever.

Our work is complex, but our vision is clear: to be a vibrant collection of unique communities that invest in their diverse people, grow their economic and health vitality, and promote innovative leadership through talented citizens for a rich quality of life for all.

In this report, we hope you enjoy stories of community impact and demonstrated ideas to build your philanthropic legacy alongside Unity Foundation of La Porte County. We are inspired by our donors, teachers, scholarship students, nonprofit organizations, businesses and citizens addressing complex issues in our diverse communities.

We're grateful for your trust and privileged to realize the potential our founders envisioned when our community foundation was formed in 1992. That potential continues to build, and Unity remains a 'Power for Good' in our communities. We invite you to join us.

Sincerely

Maggi Spartz President

fon A. Silmore

Jon A. Gilmore Chair







Visit **vibrantlpcounty.com** to learn more about this exciting initiative.



NWI BizHub connects entrepreneurs to assistance no matter where they are in their journey. Learn more at **nwibizhub.com**.

BOARD OF DIRECTORS



seated from left:

Laura Francesconi, Liz Bernel, Marti Swanson (Honorary Board Member), Angie Nelson Deuitch

second row:

Dale Parkison, Stephanie Oberlie, Kim Sauers, Edward L. Volk, Scott Rice, James W. Kaminski, Jon A. Gilmore, Maggi Spartz, the late Michael Brennan (Founder), Paul Applegate, Seth Spencer, Dr. Vidya S. Kora, Ronald J. Ragains, Diana Kabelin Corley, Dr. Barbara Eason-Watkins

not pictured:

Kathy Henrich and Honorary Board Members Daniel E. Lewis, Leigh Morris, Robert Schaefer





Maggi Spartz President



Shannon Walker Vice President



Thelma Slisher Controller



Jamie Miller Development Officer



Lauren Varga Marketing & Program Manager



Andy Neal Operations Manager



Margie Nasser Administrative Assistant (P/T)

GIVING



WAYS TO GIVE

We provide flexible, efficient, and tax effective options to ensure your charitable giving achieves the greatest possible impact. Give to Unity Foundation, your favorite fund or start a new fund!

Visit **uflc.net** to learn more about an exciting new matching opportunity – the eighth phase of Lilly Endowment Inc.'s Giving Indiana Funds for Tomorrow (GIFT VIII). We are grateful for all gifts received, no matter the size, and welcome gifts in many different forms, including:

- One-Time Cash, Check, Credit Card or ACH Donations
- Recurring Monthly, Quarterly, or Yearly Gifts
- Securities or Stocks
- Grain
- Real Estate
- Mention Unity or Your Favorite Fund in Your Will
- Life Insurance or Retirement Funds Designate Unity as a Beneficiary
- Charitable Gift Annuities

To discuss your giving ideas or learn more about starting your own fund or building funds for your favorite cause or organization, contact our Development Officer, Jamie Miller, at 219-879-0327.



Giving made easier! FUND ADVISOR PORTAL

Unity Foundation recently launched a new portal for fund advisors to access their fund information 24/7. Click on the **Fund Advisor Login button** at **uflc.net** to get started.

GIVING



THE IMPACT OF A FAMILY THE LUDINGTON SCHOLARSHIP FUND

The Robert L. Ludington & Anita Huppenthal Ludington Scholarship Fund

is an innovative Unity fund established in 2016 through the vision and generosity of Robert and Anita Ludington who believed that learning was the greatest gift you could give or receive. Since its inception the fund has granted nearly 500 awards to La Porte County students totaling \$673,000.

Robert and Anita embodied the "American Dream." After his first tour with the U.S Navy, Robert obtained a two-year degree that led to a job at Pullman-Standard where he filed his first patent in 1958 for a simplified process to replace rail car brakes. Robert never stopped being curious and learning. He continued his education at multiple schools including Notre Dame and Purdue University. When Anita decided to return to school for an education degree after twelve years' absence, Robert was her biggest cheerleader.

In addition to helping traditional students earn post-secondary degrees, the scholarship fund supports non-traditional students – like Robert and Anita including veterans and adults returning to school or transitioning to new career paths attain certificates, credits, and degrees.

To learn more about this or any Unity Foundation fund, visit uflc.net





JAMIE MILLER DEVELOPMENT OFFICER

"I am enthusiastic about collaborating one-on-one with our donors and community partners to ensure the best philanthropic solutions for their needs. I have the best job on the planet! Every day I plant seeds of trees under which I will never sit. Remember that your donations to Unity or a specific fund last forever. Contact me and together we can make La Porte County a better place to live!"

jmiller@uflc.net | 219-879-0327

GIFT PLANNING RESOURCES

Plan your estate and charitable giving in a way that benefits you, your family and your community. Visit our refreshed Gift Planning Website, **uflc.giftlegacy.com**, and discover a plan that works best for you.

up for our newsletter.



Find out what to give and learn about the best assets to make a planned gift. Learn how to give and about gift options that provide tax and income benefits. While you're there, check our estate planning resources and sign



UNITY FOUNDATION OF LA PORTE COUNTY REPORT TO THE COMMUNITY 2022-2023

SCHOLARSHIPS

310,000



Bhagirathi Agrawal Scholarship McKenzie Losinski

Row Crop Agricultural Scholarship

Kaylee Koselke Madeleine Nunn Jonathan Rocke Melissa Rudolph

Judith A. Amor Nursing Scholarship Nicole Hesters

Diane K. Bamberth Award Grace Rinkel

Gustav J. & Elma A. Banzhaf Memorial Scholarship

Francisco Bibian Erica Hesters Riley Moody Alissa Sonnenberg Sydney Varnak

Bensz Family Scholarship Kyra Krachinski Francheska Skonieczny

Lloyd G. & Betty Jane Clayton Scholarship Haleigh Miller

William Vernon Compton Scholarship Audrey Reese

Cunningham Scholarship Summer McGee

Ernest & Mildred Delco Scholarship Jillian Matzke

Carley Dickard Memorial Scholarship Mary Neary

Galena Township Scholarship Award Trenten Chalik Sydney Moody

6

James A. & Phyllis A. Garwood Memorial Music Scholarship Grace Rinkel

Donald & Beverly Guse Scholarship Emily Grieger

Harold & Rowena Hargrave Scholarship Payton Neely

Robert J. Hiler Memorial Scholarship Justin Bunce Byonka Hernandez Justin Jayasinghe

Ruth M. Howe

Scholarship Allison Grabarczyk Emma Heffron

Ingersoll Trust Scholarship Peyton Willoughby Lillian Burke Hannah Schoner

Bruce R. Johnson Scholarship Lillian Tolmen

Richard James Johnson Agriculture Scholarship Ryan Hesters Emma Hannon

Dr. King S. Jones Memorial Scholarship Adrian Huizar Kourtney Pratt

K.A.T. Volunteer

Scholarship Abigail Kemiel Rebecca Marxman Jessica Jara Huizar Allison Zila

Arthur & Alice Kabelin Scholarship

Zachary Archambault Anna Kubik Payton Neely Gretchen Sexton Peyton Willoughby Allison Zila Gavin Zolvinski

Kabelin Family Scholarship

Paige Hunter Preston Richard Christopher Seadorf Tristan Sherwood Lauren Trim

Harry L. Kelling Memorial Scholarship Carter Jones

Danielle Lilly Nathan Lilly

Kelly-Prentiss Scholarship Moriah Carmel

Sandra Calkins Kowalski Scholarship Jordan Forney

Richard & Tracy Krause

Scholarship Joel Kelley Julia Kelley Samantha Wilson Natalie Yacullo

La Porte County E-Z Riders Horse

& Pony Scholarship

Francisco Bibian Emma Hannon Anna Landing Abbigail Mitchell

La Porte County Nursing Scholarship

Carley Ellenberger Allison Grabarczyk Emma Heffron Nicole Hesters Lexi Scheidt Taylor Skibinski

La Porte County Symphony Orchestra Deborah DePoy Music Scholarship Joel Kelley Robert E. LeRoy Scholarship Tristen Poe Jory Bales

awarded this year to 172 recipients

Marilouise Lundgren Lossing Memorial Scholarship Zachary Archambault Jamie Ellis

Jack Lubeznik Scholarship Sela Van Buskirk

Robert L. Ludington & Anita Huppenthal **Ludington Scholarship** Samantha Ake Kaleb Bacztub Elizabeth Bahena Laura Bahena **Brennan Balka** Jayana Blakely **Riese Bornell** Travis Chalik Trenten Chalik James Collins Caiya Cooper Bryn Cothran **Olivia Cramer-Stevens** Lanie Criswell Rvan Cuma Olivia Davis Brenda Del Real Breanna Dove **Renee Eaton Carley Ellenberger** Jacob Ellis Aviana Garner Nicholas Gushrowski Mirabellah Hernandez Lauren Hertges Erica Hesters Sydney Hill Halle Hood Vanessa Horne **Brooklynn Hough** Abigail Huff **Emily Huff** Adrian Huizar Kvra Kellv Abigail Kemiel

Stephen Klimczak Elisabeth Korell Brenda Lopez Michael Malloy Hannah Misch Abbigail Mitchell Emma Mitschelen **Riley Moody** Sydney Moody Kristan Morrison Andrew Mrozinske Arturo Munoz Violet Murphy Violet Noveroske Madeleine Nunn Andrew Oleksiuk Austen Ott Garrott Ott-Large Grant Ott-Large Nathaniel Painter Kaitlyn Pollock Kourtney Pratt Autumn Reynolds Emma Rice Caleb Rosa Gideon Rosa Katelyn Rudolph Melissa Rudolph Joanie Sanchez **Diego Santos Bethany Schuster** Hannah Schuster Jacob Sherrick **Rachel Sherrick Michael Smelser** Sarah Smith Cory Stevenson Mia Taylor Lillian Tolmen Amanda Trojanowski Tyler Troy Alayna Tuholski Mason Tulacz **Riva Verma** Elizabeth Wadle Maria Wadle Abigail Walker Daniel Welsh **Brenna Woodruff** Makenzi Young

Joseph Zook

UNITY FOUNDATION OF LA PORTE COUNTY REPORT TO THE COMMUNITY 2022-2023

SCHOLARSHIPS

"This scholarship will help me achieve my goal of becoming a teacher and helping future generations of students."

KRISTAN MORRISON

"I am truly grateful for your support of my education. Your generosity has allowed me to pursue my dream of becoming a mechanical engineer. Thank you for believing in me."

CHRISTOPHER SEADORF

"I greatly appreciate your contribution to my education and look forward to giving back to the community through my future career."

ABIGAIL WALKER

"I am a first-generation college student and receiving this scholarship truly means the world to me. It shows the community of La Porte County supports my future endeavors, and for that I could not be more grateful."

ANGELINA CLAYTON



Ruth & Leonard Minich Scholarship Olivia Cramer-Stevens Jamie Ellis

Dr. Edwin C. & Alice J. Mueller Scholarship Jillian Matzke

Coach Nova Scholarship Alissa Sonnenberg

Pioneer Scholarship

Francisco Bibian Jacob Ellis Aviana Garner Mirabellah Hernandez Taylor Higley McKenzie Losinski Makenna Micallef Autumn Reynolds Natalia Ruiz Alissa Sonnenberg Pooja Verma Tristan Sherwood

Redington & Rootes Scholarship

Alexis Catron Paige Conklin Thomas Hertges Payton Neely Rebekah Novak

Robert A. & Dorothy W. Rocke Scholarship

Lillian Burke Anna Kubik Haleigh Miller Payton Neely Audrey Reese Hannah Schoner Peyton Willoughby Gavin Zolvinski

Donald F. Scott Motivational Scholarship

Layana Aoun Dejah Hawkins-Garner Jibreel Hoskins Adrian Huizar McKenzie Losinski Alyssa Shaia Tristan Sherwood Sophie Sorg

Floyd O. & Betty Shunk Scholarship

Zachary Archambault Jory Bales **Rachel Bellah** Jamie Ellis Jordan Forney Jade Foster **Thomas Hertges** Jessica Jara Huizar Abigail Kemiel Jillian Matzke Paige Maudlin **Kilee Miller** Payton Neely Rebekah Novak Tristen Poe Hannah Schoner Matthew Steele Ryley Zawada

Edward B. & Grace A. Steele Siperek Scholarship Taylor Higley

Mary Neary Pooja Verma Irvin & Peg Swanson Scholarship Lillian Burke Anna Kubik

Tanber-Blair

Golf Scholarship Sean Egan Violet Murphy

Neil G. Thompson Memorial Scholarship Jenna Cicero

Angelina Clayton

John R. & Florene

A. Troyer Scholarship Joslyn Rodriguez Brianne Simmons

D.I. Walker Scholarship

Evan Conrad Kaitlyn Day Brenda Del Real Mandy Fischbacher Emma Hannon Taylor Higley Brenda Lopez Audrey Reese Tyler Troy Pooja Verma

Unity Foundation County Wide Scholarship

Jory Bales Jacob Ellis Mirabellah Hernandez Sydney Hill Kylee Hughes Anna Landing Rebecca Marxman Makenna Micallef Spencer Noveroske Natalia Ruiz Francheska Skonieczny Ashlei Sonnenberg Tyler Troy Maria Wadle Gavin Zolvinski

Arlo & Jayne Westphal Scholarship Sydney Hill

Give now to help support generations of La Porte County students!



EDUCATION

The Lilly Endowment Community Scholarship Program, administered statewide by Independent Colleges of Indiana (ICI) and locally in La Porte County by Unity Foundation, provides two area students with four-year, full tuition scholarships to an accredited Indiana college or university of their choice and an annual stipend for required books and equipment.



approximately 600 awarded, benefitting

Over the past 25 years,

72 La Porte County students and their families

Grants for Michigan City Area Teachers

2023 Lilly Endowment Community Scholars



Kayla Campbell, a Michigan City High School graduate, has demonstrated outstanding leadership in her school and community through participation in a variety of extracurricular and volunteer activities She wants to ignite and inspire youth, and use her future career platform as a broadcast journalist to make a lasting and positive impact in the world. Kayla is attending Butler University.



Paloma Valdes, a Marquette Catholic High School graduate, is deeply involved in her community and uses her time, talent and opportunities to improve the quality of life of others. Her future career goals include being a part of the solution in making the technology industry more inclusive, and to leverage technology to improve societal issues in education, healthcare and the environment. Paloma is attending Saint Mary's College.

Three grant programs established by caring donors from Michigan City who believed in teachers as the critical factor for learning, annually support creative and innovative projects in Michigan City public and private schools classrooms.

Lake Hills Elementary School 2nd Grade Students

"This grant made it possible to purchase materials to make phonics learning engaging and meaningful. Many students have surpassed district, classroom, and personal goals. I would highly recommend educators continue to apply for this grant to enhance their teaching. The grant process is easy to navigate and provides educators with resources that they may not normally have."

Elizabeth Law, Lake Hills Elementary teacher and 2022-2023 Michigan City Education Foundation grant recipient.

Learn more about this year's teacher grant recipients and the impact of their projects in the classroom.



GOLD KEY SOCIETY

Ann Feltz and Matt Noll 1st Source Wealth Advisory Services

Patrick Spence Edward Jones Tim Gartland Edward Jones Jamie Miller, Unity Foundation and William Maar Thrivent Financial





GOLD KEY SOCIETY

We appreciate those who help foster gifts to or through Unity Foundation as they assist their clients in attaining their philanthropic and financial planning goals. Since our last annual report publication, we added five new members to the Gold Key Society and awarded 18 additional keys to advisors for assisting clients in strengthening their community by introducing them to Unity and the diverse options it offers to be philanthropic. Whether it is tax savings, the desire to fund a special cause or the importance of leaving a future legacy, Unity has vehicles to help everyone!

Dave Albers AFS Company, LLC

ManDee Alevios Edward Jones

William Anderson, CPA

Paul Applegate Applegate & Company CPAs

Jessica Blumenfeld Edward Jones

Natalie Boocher Schwarz Law Office, PC

Sarah Brown Edward Jones

Robin Clark Horizon Bank

Nate Cobbs Harbour Trust & Investment Management

Jess Denger Edward Jones

V. Michael Drayton Drayton, Biege, Sirugo, & Elliott, LLP

*New Gold Key Member

William Elliott Drayton, Biege, Sirugo, & Elliott, LLP

Associates, P.C. Ann M. Feltz* 1st Source Wealth Advisory Services

Espar and

Greta Friedman

Shaw Friedman *Friedman & Associates, P.C.*

Tim Gartland, AAMS

Alicia Gloyeske Attorney

Richard Graham *Ely-Graham Financial Advisory Services*

Steven Gronceski, CFP *StrateglQ Financial Group, LLC*

Michael Hackett Harbour Trust & Investment Management **Lynn Haverstock** Ott/Haverstock Funeral Chapel

Cynthia Hedge Attorney

William E. Hedge Attorney

Marty Hickey Horizon Trust & Investment Management

Lori Howard Harbour Trust & Investment Management

Ralph Howes Howes & Howes, LLP

Michael Jankowske Hamelind Group

Michael K. Jones, CFP Ameriprise Financial Services, Inc

James Kaminski Newby, Lewis, Kaminski & Jones, LLP

John Kaylor Schmitt & Kaylor CPAs

David Kibbe, J.D. Indiana Trust Wealth Management

Deborah Klosowski, CTFA Indiana Trust Wealth Management

Dale Knouse Cutler Funeral Home

Deborah Koller, AAMS Raymond James

Michael R. Kopec Edward Jones

James Lake Ameriprise Financial

Scott S. Luc, CFP[®] Cate Brunton Luc Group

William Maar* Thrivent Financial Lawrence Mazur, Retired Attorney

Barry McDonnell Attorney

Brian Merrill Harbour Trust & Investment Management

Ann Metcalf, CPA Angelos & Rardin

Matt Noll, CFA* 1st Source Wealth Advisory Services

Stephanie Oberlie Harbour Trust & Investment Management

Drummond Osborn Osborn Wealth

Justin Padgett, CFP Valeo Financial Advisors, LLC

Management

Dale Parkison, CPA *Parkison & Hinton Inc., P.C.*

David Pendergast Edward Jones

Lawrence Rardin, CPA Angelos & Rardin

Patrick Reynolds Ott/Haverstock Funeral Chapel

Timothy Rice, AIF, CWS CAPTRUST

Michael V. Riley Michael V. Riley and Associates

Thomas Root Root Funeral Home

Alec Rosario* Edward Jones

Bob Rose Harbour Trust & Investment Management

Jonathan Salisbury, AAMS Edward Jones **Rachel Saxon** Horizon Bank

Richard Schmitt, CPA Schmitt & Kaylor

James Shearin, CPA Schmitt & Kaylor

David Sirugo Drayton, Biege, Sirugo, & Elliott, LLP

Lee Slade PNC Private Bank

Angela Smoker Angela F. Smoker, CPA, PC

Patrick Spence* Edward Jones

Bruce Stevens StevINS Financial Services Marti Swanson, Retired

General Insurance Services
Susan Vance

The Power of Money 101 Karen Vogelsang Vogelsang Asset Manage-

ment **Edward Volk, Retired** Newby, Lewis, Kaminski

& Jones, LLP

Edward Wainscott, CPA Edward J. Wainscott, CPA

Bradley Werner, AAMS Brad Werner & Co.

Todd Wooten, CSA,CID Blue Sky Financial Partners, Inc.



Learn more at uflc.giftlegacy.com.

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Edward Jones

POWER FOR GOOD

5 190,000 to 45 Local Projects

"Community organizations are doing incredible work throughout La Porte County, and Unity is proud to support their efforts." – Shannon Walker, Unity Foundation Vice President



A community member prepares a meal for Nest Community Shelter (formerly Interfaith Community PADS) guests.

Community Food Pantry received a grant to provide food and household necessities to families in need in the townships of Galena, Hudson, Kankakee, and Wills.



2023 **Power for Good** Grant Recipients and their programs receiving funding are as follows:

Advancing Christ's Kingdom Ministries-Michigan City: ThanksGIVING Turkeys

Anthony Adams House: Save Our Youth

Arts in the Park: Summer Concert Series

Boys & Girls Clubs of La Porte County: Westville Club Expansion

Catholic Charities: Safe Haven Homeless Prevention

Citizens Concerned for the Homeless: Sand Castle Shelter for Homeless Families Renovation, Phase II

City of La Porte Police Department: Community Needs Fund

Community Food Pantry of Galena, Hudson, Kankakee, Wills Townships

Dunebrook: Child Advocacy Center

Dunes Arts Foundation: Creative Theatre Arts Program for Safe Harbor Summer Camp Students

Family Advocates: Inside Out Dads Pilot Program w/ La Porte County Jail

Fly High Youth Services: SOARING Through the Holidays

Hope Center: Helping Our People Excel -Rebuilding the Westside

Interfaith Community PADS: Emergency Shelter for Men, Women and Children

Intrepid Phoenix: Fitness for recovery from substance abuse disorder in La Porte County Junior Achievement of Northern Indiana: Elementary Programming – Michigan City Area Schools

La Porte County Drug Free Partnership: LaPorte Crisis Intervention Team – Improving Responsiveness to Mental Health and Substance Use Crises

La Porte County Public Library: Dolly Parton's Imagination Library in La Porte County

La Porte County Symphony Orchestra: Side by Side Concert with Local Music Educators

La Porte High School: SlicerTech Robotics

LaPorte County Habitat for Humanity: La Porte Build on McCollum and Woodward Street

La Porte Lake Association: Pine & Stone Lake weed treatments, lake equality and walleye stocking to our lakes

Leadership La Porte County: 2023-24 High School Leadership Program & Youth Advisory Council

LETSGO City: LETSGO Get It Program Support

Michiana Humane Society: Kitten & Puppy Foster Support

Michigan City Area Schools: "Future Wolves" Elementary Sports Program

Michigan City Art League: Bringing the love of art to everyone in the community

Michigan City Holiday Meals: Free Holiday Meals

Michigan City House of Hope: Program Support

POWER FOR GOOD



Michigan City Police Department: Community Needs Fund

North Central Community Action Agencies: Health and Hygiene for Youth

Open Door Adolescent Health Center

Open Door Community Alliance: Medication Assistance Program

Paladin: Reducing Social Isolation through Transportation Services

The Play for Jake Foundation: Meet Ready Eddy

READ La Porte County: Tutor Recruiter

Sacred Heart Food Pantry at St. Mary: Healthy Families

The Salvation Army of LaPorte Indiana: Client choice food pantry

Service League of Michigan City: Equipment Inventory Additions

Social and Learning Institute: Science & Nature Exploration

South Central Jr. Sr. High School: Engineering and Robotics Equipment Supplement

Stepping Stone Shelter for Women: Shelter Meals and Food Security Program

Trinity Episcopal Church: Trinity Community Food Pantry

Worthy Women Recovery Home: Worthy Home

Youth Service Bureau of LaPorte County: School Buddies Unity Foundation recognized the 2023 grant recipients during its Annual Luncheon and Grant Celebration on October 26, 2023.



Boys & Girls Clubs of La Porte County offers free programming that supports Academic Success, Character & Citizenship and Healthy Lifestyles. This grant will help increase capacity at their Westville Club.

These grants are possible because of the generosity of many donors, including visionary donors who left unrestricted community funds to Unity Foundation (listed on page 14). The following funds provided additional support for this year's grants: La Porte County Mental Health Fund, Glick Foundation Fund for the City Of La Porte, George H. And Madeline A. Smrt West Side Neighborhood Fund, Kay Franklin Commemorative Fund, Charles Westcott Youth Fund, Polad Animal Care Endowment Fund, Barry Dulyea Arts Fund for Children, and the La Porte County Educational Advancement Fund.

ASSETS

Cash and cash equivalents	\$1,515,899
Investments	37,752,782
Beneficial interest in charitable remainder trusts	
Receivables	6,060
Right of use assets	25,064
Net property and equipment	
Total Assets	\$40,050,237

LIABILITIES AND NET ASSETS

Accounts payable and accrued expenses	\$109,475
Right of use liabilities	25,064
Non-current liabilities	1,498,613
Total Liabilities	\$1,633,152

Net assets with donor restrictions	
Total Net Assets	\$38,417,085
Total Liabilities and Net Assets	\$40.050.237

REVENUES, GAINS & OTHER SUPPORT

Investment return, net\$(5,642,485)	
Contributions1,470,284	
Gift-in-kind rent66,348	
Rent income86,219	
Change in value of charitable remainder trusts65,719	
Special events, Project fee, Admin fee income 605,775	
Total revenues, gains and other support \$(3,348,140)	

EXPENSES

Revenue and support

Program services	\$2,248,081
Supporting services	
Fundraising	
Total Expenses	\$3,299,763

CHANGE IN NET ASSETS \$(6,647,903)

The above represents summarized financial data for the year ending December 31, 2022 as audited by Estep Burkey Simmons, LLC. A complete audited financial report is available upon request. The Unity Foundation of La Porte County, Inc., is a tax-exempt public charity under IRS Code Section 501 (c) (3).

As reported by our independent investment advisors, The Mason Companies, the year to date time weighted returns, net of fees, for permanent assets under management as of 12/31/22 were -12.83% vs. GRP (Growth Reference Point) of -13.95%. The 3 Year return was 4.65% vs. GRP of 2.78; 5 Year: 4.84% vs. GRP of 3.93%; 10 Year: 6.02% vs 5.91% GRP.





Summary Statement of Financial Position for the Year Ended December 31, 2022

Source: Audited Financial Statements





GRANTS AND SCHOLARSHIPS AWARDED



ASSET GROWTH ALL FUNDS



UNITYFUNDS

As your community foundation, Unity Foundation of La Porte County helps people like you invest in our community's future. We invite you to help us in our mission to strengthen La Porte County now and forever.

To view funds and give online scan the code.



COMMUNITY FUNDS

These flexible funds are responsive to ever-changing needs in La Porte County or one of its communities.

AAUW La Porte Community Fund **Backer Family Fund Bowers & Smyrl Families Community Fund** Fred & Helen Brust Community Fund Petrea A. Clark Community Fund John P. & Anne H. Daley **Community Fund Ernest & Mildred Delco Community Fund** Pauline M. Dent Memorial Fund Randy & Jane Dorman Foundation Fund Charles T. & Pauline J. Dye **Endowment Fund** Mark E. Essling Community Fund Sanford Z. Friedman Community Fund David C. Gardner Community Fund Christopher B. Jollief Memorial Fund Kabelin Family Community Fund **Ruth W. Pollingue Community Fund** Purdue Federal Credit Union Fund Scott & Marianne Rice Family **Community Fund** Tom & Judy Ringo Community Fund **Ruth Sabin Community Fund** Philip A. Sprague Community Fund Thomas C. & Blanch G. Stokes **Community Fund** Tower/Oktoberfest Community Fund Unity Foundation Power for Good **Community Fund**

John & Jean Vail Advised Fund Sandra L. Young Community Fund

CITY, TOWN, TOWNSHIP FUNDS

John A. & Dorothy Sieb Carstens Fund Galena Township Community Endowment Fund Hanna, Indiana Community Fund Westville, Indiana Community Fund



In memory of founder Mike Brennan, Unity Foundation's Operating Endowment Fund has been renamed the Mike Brennan Operating Endowment Fund to honor his legacy and vision. Mike believed that a strong Unity Foundation was critical to the future of La Porte County.

FIELD OF INTEREST FUNDS & AGENCY FUNDS

These funds benefit a specific charitable organization or cause.

ANIMAL CARE & ANIMAL EDUCATION

Animal Lover's Fund Independent Cat Society La Porte County Small Animal Shelter Michiana Humane Society Polad Animal Care Fund Washington Park Zoo Fund Clarence Weinkauff Jr. Grant Fund

ARTS & CULTURE

Arts in the Park Fund Arts United Fund of La Porte County Bankoff Family Fund for the Sinai Sunday Forum Beverly Shores History Museum & Art Gallery Fund Canterbury Guild Inc. Endowment Fund Carillon Fund of the Presbyterian Church of La Porte

*New Fund

Dunes Arts Foundation Endowment Eugene & Marilyn Glick Arts Fund *Barbara S. Friedman Poet Laureate Indiana Humanities Fund La Porte County Symphony Fund La Porte Little Theatre Club **Endowment Fund** La Porte Music Club, Inc. Fund Dale E. Landsman Arts Foundation Jack & Shirley Lubeznik Center for the Arts Jerry Peters Memorial Fund Ted & Ruth Rohrabaugh Fund for the Michigan City Lakefront Amphitheater Julia Diane Ragains Slawin Music Fund Sculptor Isamu Noguchi Tribute Fund Stisher Family La Porte High School **Band Fund**

Barry Dulyea Arts for Children Fund

Taleamor Park Environment & Art Fund Sandra L. Young Arts Appreciation Fund

COMMUNITY DEVELOPMENT & PHILANTHROPY

African American Empowerment Fund Mike Brennan Operating **Endowment Fund Economic Development Investment Fund** Honor Our Military Fund Jim Jessup Future Leaders Fund Kankakee Valley Workforce **Development Fund** Kiwanis Club of La Porte Charitable Fund La Porte County Celebration Fund Leadership La Porte County Fund Local Heroes Fund Michigan City Lion Charities, Inc. **Endowment Fund** Joseph & Jerome Nickels Fund Rotary Club of Michigan City Foundation Fund George H. & Madeline A. Smrt West Side Neighborhood Fund United Way of La Porte County **Endowment Fund** Unity Foundation Operating Fund Vibrant Communities of La Porte County Wanatah Lions Club Endowment Fund Ron Wood Jr. Memorial Water Safety Fund

UNITY FUNDS



The African American Empowerment Fund offers a unique opportunity to identify challenges and opportunities to improve the economic and health conditions of the African American people in La Porte County.

EDUCATION

Barbara A. Carmen Memorial Fund

Janet Collings Drayton Teacher Innovation Fund

The Graduates of Isaac C. Elston High School Education Support Fund

Haiti Children's Education Fund

Ivy Tech MC Pejic Campus Fund

La Lumiere School Endowment Fund

La Porte County Educational Advancement Fund

La Porte Educational Development Foundation Endowment Fund

La Porte High School Class of 1952 Fund

League of Women Voters Education Fund

Marquette Catholic HS Education Fund

Michigan City Area Chamber of Commerce Education Foundation

Michigan City Area Schools Endowment Fund

Michigan City Education Foundation

J. Robert & Marjorie Miller Teacher Advancement Fund

Morgan Family Foundation Fund

Jeanette and George Neagu Gardens for All Fund

Notre Dame Catholic School Education Fund

Peepers for Teachers

Queen of All Saints School Language Arts

South Central Education Foundation

Teacher Innovation Fund for MCAS

Westville Schools (MSD of New Durham Twp) Endowment

*New Fund

EMERGENCY SERVICES, HOUSING & FOOD

Affordable Housing Fund for the Greater Michigan City Area

American Red Cross Endowment Fund – La Porte County Chapter

Catholic Charities of the Diocese of Gary

Food Bank of Northern Indiana Funn

Home Team Project Fund

Homeward Bound, Inc. Endowment Fund

Housing Opportunities Endowment Fund

La Porte County Disaster Relief & Recovery Fund

La Porte County Habitat for Humanity, Inc. Endowment Fund

La Porte County Meals on Wheels Endowment

Michigan City Holiday Meals

Lorraine Gehrke Orlowski Fund for Housing & Homelessness

Nest Community Shelter Endowment Fund (formerly Interfaith Community PADS)

The Salvation Army of La Porte Endowment Fund

The Salvation Army of Michigan City

The Salvation Army of Michigan City Major Building Repairs Fund

Sand Castle Shelter for Women & Children Stepping Stone Shelter Endowment Fund

ENVIRONMENT, PARKS, & RECREATION

Barker Woods Stewardship Fund Beechwood Golf Course Endowment Fund Dunes Environmental Learning Center Tuition Assistance Fund Environmental Improvement Fund for La Porte County

Fort La Play Porte Endowment Fox Memorial Park Endowment Fund

Friendship Botanic Gardens Fund

June B. Kelley Garden Fund for Long Beach La Porte City Park Foundation Fund

La Porte County Conservation Fund

La Porte County Conservation Trust Fund La Porte County Park Foundation Fund

Long Beach Tree Fund

Mill Pond Park Fund

Jan Nona Environmental Stewardship Award Fund

Rotary Special Projects Fund

Save the Dunes Conservation Fund Endowment

Shirley Heinze Land Trust Endowment for La Porte County

Trail Creek Watershed Partnership Fund

Urban Forestry Fund – Michigan City

Unity Park Endowment Fund

FAMILY SUPPORT

Children's Fund (Child Abuse Prevention) – Dunebrook

Family Advocates (CASA) Fund

*Held In Hope Endowment Fund

La Porte Family YMCA Child Care Center Fund

Women's Care Center of Greater La Porte County Endowment Fund Womens Well-Being Fund

HEALTH CARE

Center for Hospice Care Fund Duneland Health Council Fund Erdheim – Chester Disease Global Alliance Fund Franciscan St. Anthony Health, Michigan City Fund Mosette Levin Cancer Fund Open Door Community Health Alliance Endowment Fund Dr. R. Thomas Rocke SMILE Foundation VNA of La Porte County Endowment

HISTORIC PRESERVATION

Celebrating Naomi Anderson Project Fund Dick Reel Memorial Pioneerland Fund Michigan City Lighthouse Catwalk Maintenance

Rumely/Allis-Chalmers La Porte Heritage Center Fund Washington Park Bandstand Fund

(continued on next page)

UNITY FUNDS



Emma Hersom is the 2023 recipient of the Clarence Weinkauff, Jr. Memorial Award, established to promote the La Porte County 4-H swine program and reward the extra effort and passion that goes along with breeding and raising swine.

A grant from the Jerry Peters Memorial Fund supported the wrapping of the Michigan City High School resource officer vehicle. MCHS students created the design.



(continued from previous page)

LITERACY & LIBRARY SERVICES

Kay Franklin Commemorative Fund La Crosse Public Library Fund La Porte County Public Library Endowment Fund

Marquette Catholic High School Library Fund

Michigan City Public Library Fund **READ La Porte County Literacy Fund** Unity Foundation Literacy Fund

MENTAL WELL BEING

Anam Cara Endowment Fund Mental Health Fund of La Porte County Samaritan Counseling Centers Fund Worthy Women Recovery Home Endowment Fund

POSITIVE YOUTH DEVELOPMENT

4-H of La Porte County Boys & Girls Club of La Porte County **Endowment Fund** Boy Scouts of America LaSalle Council #165 Fund Imogene L. Dahl Purdue Extension Fund DeCamp's Band of Brothers Fund Dr. Fischer LPHS Athletic Fund Foundations for Youth (Youth Service Bureau) Girl Scouts of Northern Indiana-Michiana Hands off Heroin Fund, MSD New Durham Twp Schools Imagination Station Fund Junior Achievement of Michigan City

*New Fund

La Porte County Fair Fund La Porte County Family YMCA Fund La Porte County Family YMCA MC Elston Branch Endowment Fund La Porte Jaycees Deserving Children **Endowment Fund** LOK Wishing Tree Foundation MCHS Athletic Booster Club Zach McCov Youth Development Fund Aaron McNew Memorial Fund New Prairie Athletic Capital Fund Kent D. Ribordy Youth Fund Philip A. Sprague Care & Share Fund *Steck Family Music Education Fund Teen Dream Fund Tuholski & Oberlie Environment & Arts Fund for Youth **Charles Westcott Youth Fund** Youth 2 Youth Endowment Fund RELIGIOUS **Bethel Presbyterian Church**

of Union Mills Fund

First United Methodist Church of La Porte Endowment Fund

Holy Family Parish Endowment

Evelyn & Robert Johnson Fund for the First Christian Church of La Porte Music Fund for First United Methodist Church of La Porte

Presbyterian Church of La Porte **Endowment Fund**

Sinai Temple of Michigan City Endowment St. John's United Church of Christ, **Michigan City**

Trinity Church Fund, Michigan City Wanatah Sacred Heart Catholic Church

SENIOR CITIZEN WELL BEING & OTHER-ABLED

Agrawal Family Fund for Social & Learning Institute Gardner & Guerrucci Memorial Endowment Fund for Social & Learning Institute **Gesse Family Endowment** for the Other-Abled Legacy Fund for the Swanson Activity Center for Older Adults Library Services for the Disabled Fund Paladin Endowment

Reins of Life Michigan City Endowment Fund Senior Independence Fund SHARE Foundation with the Handicapped Fund

SCHOLARSHIPS & AWARDS

Agricultural Scholarship The Judith A. Amor Nursing Scholarship Diane Kay Bamberth Memorial Award Gustav J. & Elma A. Banzhaf Scholarship Fund **Bensz Family Scholarship Fund** Barbara Brandon Piano / Organ Achievement Award Dr. Windham Bremer Scholarship Lloyd G. & Betty Jane Clayton Scholarship Fund William Vernon Compton Scholarship Earl & Faye Cunningham Scholarship Anne H. Daley Youth Service Bureau Scholarship R.E. Daly III La Lumiere Scholarship Ernest & Mildred Delco Scholarship Carley Dickard Memorial Scholarship Fund Galena Township Scholarship Fund James A. & Phyllis A. Garwood Memorial Music Scholarship Donald & Beverly Guse Scholarship Fund Harold & Rowena Hargrave Scholarship Robert J. Hiler Memorial Scholarship Ruth Howe Memorial Nursing Scholarship The Ingersoll Trust **Richard James Johnson** Agriculture Scholarship Dr. King S. Jones Memorial Scholarship Fund Arthur & Alice Kabelin Scholarship Kabelin Family Scholarship K.A.T. Volunteer Scholarship Harry Kelling Scholarship Fund

UNITY FUNDS

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Sandra Calkins Kowalski Community Nursing Fund

Richard & Tracy Krause Scholarship Fund

The La Porte County E-Z Riders Horse & Pony Scholarship Fund

La Porte Amateur Music Scholarship La Porte County Nursing

Scholarship Fund

La Porte County Symphony Orchestra Deborah DePoy Scholarship

Robert E. LeRoy Tennis Scholarship

Linnen Family Scholarship for La Lumiere

William P. & Mary Lou Linnen Fund for St. Mary's College

Linnen Memorial Fund for La Lumiere

Marilouise Lundgren Lossing Memorial Education Fund

Jack Lubeznik Scholarship Fund

Robert L. Ludington & Anita Huppenthal Ludington Scholarship Fund

Ruth & Leonard Minich Scholarship Fund *Morgan Family Scholarship Fund

Dr. Edwin C. & Alice J. Mueller Scholarship Fund Coach Nova Scholarship

Loyal Perlich Outstanding Speaker Award

Pioneer Scholarship Redington & Rootes Scholarship Ida M. Reffett Debate Scholarship Robert A. & Dorothy W. Rocke Scholarship

Frank & Dorothy Schellin Scholarship Donald F. Scott Motivational Scholarship Floyd O. & Betty L. Shunk Scholarship Edward B. Siperek & Grace A. Steele

Siperek Scholarship Irvin E. & Peg Swanson Scholarship

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D.I. Walker Scholarship Fund

Arlo & Jayne Westphal Memorial Scholarship Westville Police Department Scholarship

DONOR ADVISED FUNDS

These funds are for charitable purposes recommended by the Donor Advisor. Their recommendations are honored as long as they are deemed legal and charitable in nature.

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VISIONARIES



Visionaries and former board members **Leigh Morris** and **Marti Swanson** were named Honorary Board Members in recognition of their substantial and ongoing commitments and contributions. Pictured with Jon Gilmore, Board Chair, and Maggi Spartz, President.

Ordinary people extraordinary vision

Unity Visionaries see beyond today to enrich our community far into the future. They were inspired to start a permanent fund; name Unity as a beneficiary of their will, insurance policy or IRA; or to create a charitable gift annuity. By doing one or more of these acts, they are meeting their goals today, while making a lasting expression of their family values.

We love our Visionaries and they love what Unity does to help them strengthen La Porte County now and forever!

We are grateful for their trust and their commitment to our future.

TRIBUTES

Unity Park is located on Pine Lake in La Porte.

GIFTS



IN MEMORY OF

Allison pets **Evelyn Amberg** Arlene Avery Kathy Bard Karin Bauchrowitz Linda Blozis Virginia Bobillo Mike Brennan Leona Brown **Buster Brown** Linda Burden Annette & Gus Carlson **Robert Clark Ron Clindaniel** John Coulter Deidra Crail Laura Crochet Kyle Ethan Dale Lois Dawson John P. and Anne H. Daley Larry Dalton Marsha Demkovich Wayne Dudeck Luella Ensign Eula Richard (Dick) Euler Don Foldenauer Barbara S. Friedman **Michelle Fuller** Gail and Bonnie **Bobbe Gull**

Grandma Gum "GG" Holly **Robert Horst** Carol Howe Claire Howe Frank Howe Theresa Jamieson Leon and Norma Kaminski Peter Kaminski **Calvin Kesling** Charlene Kesling Lindsey Kesling Dr. Peter Kesling **Rus Kintzle** Sandra Kowalski Joseph Krochta Judith Louise Hayes Kroczek Dale Landsman Tom Larson Thomas and Jean Larson **Bob Lasater** Dr. Ross Lawrence Helen Lazarek Mary Lou Linnen Marge Leek David Levenhagen Lee Levine Maurice Levine **Bob & Joyce Livesay** Nancy Luethke Alvin P. Luther

Amos Malstaff Merle J. Marguiss John H Marshall **Dorothy Massena** Jerry Mayes **Terence Metcalf** Pat Molden Gene & Marianne Moldenhauer Sheryl Morrison **Our Mothers Raymond Nemeckay Richard Niegos** Fran Oberlie Debbie Paholski Vance Parkhouse Jackie Passauer **Isabelle** Peterson Larry Reed **Rick Richards Brett Ricks Eyvette Rose Burton Ruby** William C. Ruddell **Bob Rumsey Randy Russell** Shirley Sassaman Loretta Scarborough **Eileen Schnick** Nick Seibert James Sennett Gene Shurte

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Rodney W. Smith Mark Sobecki **Stephen Squires** Richard Stalbrink Sr. William Staples Jean Steck Neil G. Thompson Lewis Timberlake Dr. Bart Tyrrell John and Carol Weeks Susan Wilkins **Becky Williams** Ed Wojasinski Kay Wojasinski Armina Kitty Wolf Ron Wood Jr.

IN HONOR OF

Nick Africano Cheryl Allen Darby Arnold Bobbye Bellis Andrew Berkson Rabbi Marc Berkson Beth S. Berkson Susan Berkson Emily Bozeman Ellen Byers Curt Cipares Earl & Faye Cunningham Steve DePalma William Elliott Otto Euler Brian & Anna Fine **Raymond F. Gaston** Patricia Gronceski Dawn Hyna IJ Sister Marie Joy Tim King Deb Klosowski **Roy Langford** Lubeznik Center for the Arts Max and Ireland, MHS cats Missy My beautiful mother **Bertie Noorlag Dale Parkison Ruth Radke Reins of Life** John Sheely Rev. and Mrs. RT Shipp **Denice Shipp-Glenn Stepping Stone Shelter** For Women Tam & Becky Tone, Chip, Chumley, **Rollie Fingers, Smitty** William and Souhaila Wendt

Unity Vice President Shannon Walker (third from right) graduated from the Indiana Philanthropy Alliance's John Mutz Philanthropic Leadership Institute, a 10-month intensive program that identifies and develops transformational philanthropic leaders in Indiana.





Donors who contributed \$100 to \$999 between October 1, 2022 and September 30, 2023.



(continued from previous page)

The La Porte County Symphony Orchestra is a cornerstone of the vibrant arts landscape in Northwest Indiana. Unity Foundation continues to be a proud sponsor of the LCSO.

LEADERSHIP BUILDERS

Donors who contributed \$1,000 or more between October 1, 2022 and September 30, 2023



Unity Foundation donors helped support scholarships for Michigan City Area Schools middle school students to participate in the South Shore Sailing School.

Are you a past Unity scholarship recipient or Lilly Scholar?

We want to hear from you! Please scan the QR code and respond to a brief survey.

As champion of the African American Empowerment Fund, Denice Shipp-Glenn is helping to build the fund so that we can provide new opportunities to strengthen the people of La Porte County.







422 Franklin St., Suite C Michigan City, IN 46360

THANK YOU TO OUR 2023 SPONSORS!

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Why we give...

"At Horizon Bank, our commitment to our community's growth and prosperity is unwavering. That's why we choose to support the Unity Foundation, a trusted partner in our collective mission to enhance our community. Through their diverse range of giving

opportunities, the Unity Foundation consistently proves its ability to drive positive change, making our community a better place for all."





"NIPSCO is proud to partner with Unity Foundation of La Porte County, an organization that shares our belief in prioritizing the social and economic growth and prosperity of the community we serve. With our continued support, NIPSCO is certain Unity Foundation will achieve its goal of assisting more people and organizations with the help they need."



NIPSCO Public Affairs & Economic Development Manager Denise Conlon (center) with Unity Foundation staff members.

