



Philanthropy: Easy, Effective, Enduring

ANNUAL REPORT 2013



From the chair...

Southwest Louisiana is experiencing unprecedented growth. This growth is bringing change. It is my honor to chair an organization dedicated to shaping our future in a meaningful way. The mission of our **Community Foundation** is to bring people and resources together to enhance the quality of life in our region. As the chairman of the **Community Foundation**, I look forward to working with individuals, businesses, nonprofits and governmental entities to shape our future in a way that benefits us now and for generations to come.

It's time to dream big in Southwest Louisiana. The **Community Foundation** is here to help make those dreams a reality. One of my dreams is to see our nonprofit organizations and schools energized, proactive and more robust for my children's children and beyond. The **Community Foundation** can help make these dreams a reality. Interested people can contribute to an **Endowed Fund** for nonprofits, schools or causes they wish to support. By making a one-time or annual tax-deductible contribution, your dollars may be combined with other gifts. As a result, **Endowed Fund** investments continue to grow. The income from these long-term investments are used to support the organization, benefitting current and future generations.



Another dream: maximize and optimize our opportunities in this time of great promise. In the early 20th century, Southwest Louisiana pioneers dreamed about a ship channel that would connect the Gulf of Mexico to Lake Charles. Together, they made their dream a reality, and what an impact it continues to have on our regional economy. The **Board of Directors** of the **Community Foundation** is moving forward to turn the hope of the 21st century into our own real gains.

Let's see what we can do together! Work with your coworkers, friends, neighbors and me as we dream big. We'll bring those dreams to life for us, our children and future generations.

—**Tom Shearman**
Chair, 2014—2016

2014 Board of Directors

Board of Directors—A board composed of up to 18 members governs the Community Foundation. Terms are three years; directors may serve two consecutive terms. The Community Foundation's chair and other officers are elected annually from the board and serve two-year terms. Officers may serve two consecutive terms, after which they must rotate off for at least one term. The president, who also is CEO, serves as a board member. We thank Phil Earhart, past chair, and Edwin F. Hunter III for their years of dedicated service to the board.

Tom Shearman, *Chair*, American Press

Sara Judson, *President and CEO*, Community Foundation of Southwest Louisiana

Jon Manns, *Vice Chair*, Axiall, retired

Jonald Walker, *Treasurer*, J. Walker & Co.

Dan Donald, *Secretary*, Jeff Davis Bank

Greg Webb, *Past Chair*, First National Bank

Susan Blake, Community Volunteer

Dinah Bradford, Community Volunteer

Mary Shaddock Jones, Attorney at Law

Brent Lumpkin, Lumpkin Properties/Southland Capital

Rick Richard, Empire of the Seed

Marshall Simien, Simien & St. Mary Law Firm

Lehrue Stevens MD, The Pathology Lab

Mary Leach Werner, The Sweet Lake Land & Oil Co.



**COMMUNITY
FOUNDATION**
of Southwest Louisiana

About us...

The Community Foundation of Southwest Louisiana improves the quality of life in two ways.

1. The Community Foundation connects fund donors—philanthropists—to worthwhile projects and nonprofits. Fund donors open charitable accounts with the Community Foundation and receive tax deductions for donations to the account. We manage the funds, issue grants upon their request and handle all paperwork.
2. The Community Foundation conducts projects to shape the direction of our region, such as master planning to improve public spaces.

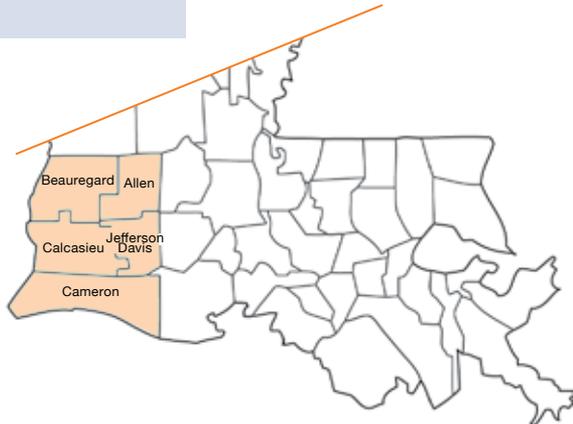
We serve people in the parishes of Calcasieu, Beauregard, Allen, Cameron and Jefferson Davis.

The Community Foundation was founded in 2001 under the United Way. After initial development, the board had the opportunity to align with the Baton Rouge Area Foundation (BRAAF), which has granted more than \$350 million across South Louisiana since inception in 1964. The affiliation with BRAAF let us expand our capacity and pool finances to accelerate the work of philanthropists. An independent board from Southwest Louisiana governs our Community Foundation. Denise Rau of Rau Financial Group serves on the investment committee that oversees the stock and bond assets of the Community Foundation.

INVESTMENT PORTFOLIO RETURN

2013.....	10.16%
2012.....	9.87%

WHO WE SERVE





Message from the President...

"Never doubt that a small group of thoughtful, committed citizens can change the world. Indeed, it is the only thing that ever has." —Margaret Mead

This is one of my favorite quotes and speaks to why I am now leading the Community Foundation of Southwest Louisiana. I've had the pleasure of working with many dedicated people in both volunteer and professional organizations. We have all seen first-hand the positive impact that thoughtful, committed people can make. The passion of one person often spreads to others; together, they create positive change.

A **community foundation** gives people - individuals, families, businesses, a group of like-minded residents - a variety of ways to make a positive difference that can last well past their lives. A Community Foundation like ours helps people shape the future.

A powerful example is Reed Mendelson, a former board member, and Wayne Simmons. Reed Mendelson, a financial advisor, had a client who wanted to donate to four charities upon his death. Reed advised him about an opportunity with the Community Foundation, where he could continually give to these four charities. Acting on that advice, Simmons decided to create an Endowed Fund through the Community Foundation, whereupon his death the annual income will go to his four selected charities forever! Instead of receiving one time dollars used perhaps in just one operating budget, the organizations will continue to impact



the community through on-going, annual support. Mr. Simmons died recently, leaving the legacy that will live on through causes that make a positive impact.

This annual report highlights other thoughtful, committed citizens who are changing the world. I encourage you to read about young **Maci Fontenot**, who, after beating cancer, decided to give back to others who had supported her. Her family's commitment to making a difference is made easier through the Community Foundation. **LaGrange High School alumni** are positively impacting students and faculty through a fund they created at the Community Foundation. Again, a group of thoughtful, committed citizens are making life better for others.

As you can see, there are many reasons to be energized about the difference the Community Foundation can make in Southwest Louisiana. I urge you to be an active partner by becoming a **Friend of the Community Foundation** through an annual charitable donation or to start a **Charitable Fund** that fits your own charitable giving goals. As thoughtful, committed citizens, we will shape a bright future.

—**Sara McLeod Judson**
President and CEO

“You don’t have
to be perfect to
be amazing!”

—Maci Fontenot



It takes a family...

At the mere age of 4, when she was starting to see the world, Maci Fontenot was blinded in one eye by a tumor. Looking at herself in the bathroom mirror, she would sob to her mother, “I’m broken. I’m broken.” Nikki Fontenot healed her daughter with a challenge: Turn your misfortune into good for others.

So Maci Fontenot became a published author, writing “You Can’t Take My Vision: Finding Purpose Through Your Pain.” And then she became a festival producer, creating **MaciFest** to raise money for charities.

Ten years old now and clear of cancer, Maci talked Bethany Hamilton into sharing her own story of triumph at the festival this year. Maci and the surfer, who overcame a shark attack to return to professional competition, together raised several thousand dollars for the **Red Cross**.

“It takes up a lot of time, but we have a lot of fun with it,” says Maci of the festival, a ticketed event with music by young people and games.



The Community Foundation of Southwest Louisiana has made it easier for Maci and her family to grow MaciFest. Our legal staff ran the thicket of IRS regulations to create a Field of Interest Fund at the Community Foundation. The finance department manages a charitable account for the nonprofit. Money raised is pooled with our other charitable accounts and those of our affiliates, the Baton Rouge Area Foundation and the Northshore Community Foundation, to achieve the greatest returns.

It appears that our Community Foundation will have more to do. That's because Maci's six-year-old sister Ellie has begun her own fund-raiser. "It's called Hula Hoop for THE Heart," says Ellie. "Not Hula Hoop for Heart." She's already donating funds to the **American Heart Association**.



Advisory Board members Denise Rau, Jamie Bice and David Conner with students Davia Landry and Jeremiah West

Get set...go...

The starter blocks wobbled under the runners feet. The baseball bats jangled when balls were smacked. The helmets that protect young minds were dented. And there was not an extra penny in LaGrange High School's budget to replace all the worn-thin athletic equipment.

Eight generous graduates created a charitable account—a Field of Interest Fund—at the Community Foundation of Southwest Louisiana. They continue to raise money for the LaGrange Athletic and Educational Fund, an investment account for doing good. AT&T appreciated the effort and added \$10,000 to the amount alums raised initially. “We are looking forward to continuing to support programs that keep students in school, and help create the workforce of the future,” said Sonja Perez, AT&T president for Louisiana.

The Community Foundation will continue to manage the Fund as it grows over time and manage the grants process in line with the wishes of the fund's advisory board, which includes Louisiana Speaker of the House Chuck Kleckley, Mayor Randy Roach, Calcasieu Parish School Superintendent Wayne Savoy, and local business leaders Jamie Bice, David Conner, Denise Rau, Lenard Quebedeaux and Philip Tarver.

Alumni of other SWLA schools are invited to connect with the Community Foundation to learn more about how they can support their alma maters.

“I support the LaGrange Fund as part of my overall support of education, particularly targeting my alma mater. Given the budget constraints on government, private citizens simply must step up to give today’s youth the same opportunities we were all given. Every dollar counts.”

–Denise Emerson Rau, LG 1977

Donors open charitable funds and make tax-deductible investments in them. The Community Foundation does the rest—managing the funds, issuing grants to nonprofits recommended by the donor, providing local knowledge of issues and nonprofits, filing the paperwork with federal and state agencies. Below is a list of funds started by our donors. Grants from charitable accounts are in the next section.

DONOR FUNDS

Autism Services of Southwest Louisiana
Kyle Broussard Memorial Fund
Staci and David Bruchhaus Fund
CFSWLA Key Indicators Fund
Chambers-Bokros Medical Fund
City of Sulphur Enrichment Fund
Community Foundation of Southwest Louisiana Displaced Residents Fund
Community Foundation of Southwest Louisiana Hurricane Relief and Recovery Fund
SWLA Firefighters' Fund
First Lieutenant Douglas B. Fournet Memorial Fund
The Emma Dee Gray Foundation Fund
Juliet Hardtner Fund—Endowment
Juliet Hardtner Fund—Spenddown
Ginny and John Henning Endowment Fund
Lena and Bill Henning Memorial Endowment Fund
Lena and Bill Henning United Methodist Church Fund
Susan and W.L. Henning Jr. Fund
Thomas G. and Shirley M. Henning Family Foundation Endowment Fund
Thomas G. and Shirley M. Henning Family Foundation Spenddown Fund
The Industrial Development Board of the Parish of Calcasieu Inc. Fund
JPMorgan Chase SWLA Fund
The LaGrange Athletic and Educational Fund
Lake Charles Memorial Hospital Foundation Fund
The Fritz Lang Foundation Fund
Jack E. Lawton Family Fund
Mendelson Family Fund in Honor of Rev. Dr. Joseph P. Bishop
Military Veterans Fund
Millennium Park Restoration Fund
Dr. and Mrs. W. A. Mixon Fund
Hector San Miguel Memorial Fund
The Saint Anthony Fund
The Bishop Jude Speyrer Fund in Honor of Monsignor Gouaux
The Stables of Le Bocage Fund
Southwest Louisiana Law Center Fund

Donors can choose from a fund that best suits their causes. Please contact Sara Judson to learn more about funds that can be tailored to fit your charitable giving goals.

Donor Advised Funds and Corporate Advised Funds: The most popular of the funds, they are like an investment account for doing good. Donors put money in the funds and recommend grants to nonprofits. The Community Foundation makes the grant and manages the associated paperwork.

Designated Beneficiary Fund: Donors use these funds to automatically give to a nonprofit of their choice. They put money in an endowment and designate in legal documents a nonprofit that will receive earnings from it.

Field of Interest Fund: This type of fund is managed by the Community Foundation and its board or by a committee set up by donors. Each fund is dedicated to an area, such as education. The fund may be used to pay invoices incurred to do fundraising for the fund.

Community Foundation Fund: You entrust the Community Foundation to invest in emerging opportunities. With no restrictions placed by fund donors, decisions are made by our board. This enables the Community Foundation board to react more quickly to opportunities to meet a need or improve quality of life in SWLA.

Organization (Agency) Fund: A means for charities to use services of the Community Foundation. We manage assets on behalf of nonprofits to provide the greatest return within reasonable risk.

Support Organizations: These are nonprofit subsidiaries. Grants from SOs are approved by their own boards. Generally, fund donors begin support organizations with a minimum donation of \$1 million.





Hector San Miguel Fund Grant

The Hector San Miguel Memorial Fund was created by colleagues and friends of this award-winning newspaper reporter, who died of leukemia in 2009. The Community Foundation assists the fund's advisory board in holding an annual awards luncheon to honor Hector's memory. KPLC's Gerron Jordan is the first winner of a second award that has been created with the fund's growth. He used the award to attend the Computer Assisted Reporting Conference sponsored by Investigative Reporters and Editors Association.

Donors contribute to their charitable funds, then make grant recommendations. The Community Foundation board approves the grants, issues the checks and follows up with nonprofits. We handle the paperwork, provide local knowledge and pool our assets with those of our affiliates in Baton Rouge and Covington to provide exceptional returns for fund donors.

Since forming in 2008, the Community Foundation has granted \$7.8 million, thanks to the generosity of philanthropists who have established donor funds with us. In 2013, our fund donors and the Community Foundation granted \$505,313 to nonprofits.

A list of donor funds from which grants are made is in the preceding section. A list and accounting for grants are below.

2013 GRANTS FROM DONOR FUNDS

Animal Welfare	\$6,680
Culture and Arts	\$1,000
Education	\$75,592
Environment and Wildlife	\$1,000
Health	\$15,700
Human Services	\$248,992
Religion	\$156,348
TOTAL	\$505,313

GRANTS BY YEAR

2013	\$505,313
2012	\$1,530,495
2011	\$1,597,851
2010	\$1,088,450
2009	\$2,893,234
2008	\$209,000

2013 GRANTS— Total: \$505,313

- Alfred M. Barbe High School, \$1,500
- American Heart Association Inc., \$1,700
- Autism Services of Southwest Louisiana Inc., \$2,500
- CCA Louisiana Foundation, \$1,000
- Ethel Precht HOPE Breast Cancer Foundation Inc., \$1,000
- Family and Youth Counseling Agency Inc., \$138,892
- Fellowship of Christian Athletes, \$10,000
- Imperial Calcasieu Museum Inc., \$2,500
- LaGrange High School, \$12,792
- Los Medicos Voladores, \$50,000
- Louisiana 4-H Foundation, \$1,681
- McNeese State University Agriculture Foundation, \$20,000
- McNeese State University Foundation, \$11,500
- National Lung Cancer Partnership, \$2,500
- New Life Counseling Inc., \$1,000
- Our Inheritance Ministries Inc., \$2,000
- Our Lady Queen of Heaven School, \$2,000

- Petal School District Education Foundation Trust Inc., \$25,000
- Pin Oak Charity Horse Show Association, \$10,000
- Salvation Army Lake Charles, \$5,000
- Southwest Louisiana Hospital Association Foundation Inc., \$50,000
- Spring Gathering Charity Horse Show, \$1,000
- St. Louis Catholic High School, \$3,800
- St. Louis Catholic High School Foundation, \$1,000
- St. Luke-Simpson United Methodist Church, \$10,000
- St. Nicholas Center for Early Intervention, \$2,500
- Summerville Baptist Church, \$10,000
- The Whistle Stop, \$600
- Town of Jena, \$1,000
- Trinity Baptist Church, \$30,000
- United Methodist Foundation of Louisiana, \$92,348
- Wounded Warrior Project Inc., \$500



1st Lt. Douglas B. Fournet Memorial at Veterans Memorial Park

The Foundation collaborated with the City of Lake Charles and the Mayor's Committee for the 1st Lt. Douglas B. Fournet Memorial to help make this dream a reality. This Fund gave people the chance to join together in making tax-deductible contributions to create a memorial that serves as a lasting reminder of our many local heroes, including Lt. Douglas B. Fournet.

The Community Foundation is just getting started with its civic initiatives that improve the quality of life for everyone. We are partnering to develop the bike and pedestrian paths over Contraband Bayou Bridge, which we believe will spark a network of trails across Southwest Louisiana. Civic initiatives are supported by Friends of the Community Foundation. Please join us as a Friend of the Community Foundation to create a Southwest Louisiana we all deserve.



Millennium Park Restoration Fund

Southwest Louisiana loves Millennium Park. When it was destroyed by fire in 2011, the City of Lake Charles partnered with the Community Foundation to create the Millennium Park Restoration Fund so individuals and businesses could easily support the rebuilding of this lakefront attraction. This Field of Interest Fund allowed tax-deductible donations to be received and acknowledged, and bills to be paid so that a bigger and better Millennium Park could again be a place families enjoy.



FRIENDS OF THE COMMUNITY FOUNDATION

FOUNDERS FORUM

(\$5,000 to \$10,000)

American Press Foundation

— Tom & Noni Shearman

Capital One Bank

Stockwell Sievert Law Firm

IMPACT ALLIANCE

(\$1,000 to \$4,999)

Dr. & Mrs. David Buttross Jr.

Penny & Dan Donald

Lucie & Phil Earhart

Iberia Bank

Reed Mendelson

Brian & Mary Shaddock Jones

Mr. & Mrs. W. Brent Lumpkin

McDonald's of SWLA

— Doug Gehrig

Anne & David Reinauer

Dr. and Mrs. Lehrue Stevens

Lisa & Jonald Walker

SIGNATURE

(\$100 to \$999)

Erin & Kevin Alley

Arabie Environmental Solutions Inc.

Autism Services of Southwest Louisiana

Louie D. Barbe III

Edith & Bryan Beam

Susan Blake

Mr. & Mrs. William Blake

David Brossett

Helen Curot

Julie Gani

Greengate Garden Center

— Sallie L. Dondis

Mark A. Hanudel

Caroline Hollins

Edwin F. Hunter III

William & Jean Mancuso

Lady Marilyn Q. McLeod

Mr. & Mrs. Paul Miller

Jody Reed

Randy Roach

Della & Billy Rose

Terry & Vic Stelly

Janet & Chad Thielen

United Way of Southwest Louisiana

— Denise Durel

Joanna & Charlie Viccellio

Dr. & Mrs. George Hardy Vincent

Tammy & Greg Webb

Kelly & Aubrey White

MEMORIALS AND HONORARIA

Any resident can make a gift to the Community Foundation in honor or in memory of someone.

2013 Honoraria

Ms. Susan Marriner

Mr. Reed Mendelson

2013 Memorials

Mr. Roy Abate

Mr. Frank Evans Brame

Mrs. Louise "Jean" Courmier

Mrs. Joyce Faulk

Mr. Ernest Garfield Fritsche

Mr. Randy Roberts

Mr. Allan Troutman

Mr. Richard "Ricky" Wayne Tupper

Mr. Reed Mendelson (all above)

Dr. Billy Rivers Penn

Mr. and Mrs. Michael Nodier

“By supporting the Community Foundation we can combine our resources and energy to improve the quality of life for our families, friends and neighbors for generations to come.”

–Greg Webb, Immediate Past Chair



**COMMUNITY
FOUNDATION**
of Southwest Louisiana



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