

# THE REALTOR® FOUNDATION

ANNUAL REPORT 2013



**THE REALTOR®  
FOUNDATION**

*linking hope to homeless*





## OUR MISSION

To mobilize our real estate community to raise funds and foster support for organizations that transition central Indiana's homeless to safe and secure housing.

## OUR VISION

Central Indiana's homeless have access to safe and permanent housing solutions that positively change their lives.

## OUR HISTORY

Founded in 1984 by the Metropolitan Indianapolis Board of REALTORS® and operating as its charitable arm, the REALTOR® Foundation provides REALTORS® the opportunity to make a difference by supporting the people, projects and services that shape the quality of their community.

Since its founding, the REALTOR® Foundation has awarded grants that have helped central Indiana strengthen its environment.

In 2003, the REALTOR® Foundation announced its new mission to assist in fighting the serious problem of homelessness in our area. The Foundation made a long-term commitment to working with organizations in and around central Indiana that reach out to victims who have lost their homes due to domestic violence, natural disaster, job loss and other tragedies. Our focus is on breaking the cycle of emergency shelters and homelessness, putting victims on the path to stability. Since 2003, the Foundation has granted more than \$1,000,000 to local homeless service providers.

*Our 2013 Annual Report is provided with the generous support of RE/MAX of Indiana.*



## LETTER FROM THE PRESIDENT

I have been honored to serve as the REALTOR® Foundation President in 2013.

The Foundation had another banner year thanks to the combined generosity of individuals and businesses in our real estate community. All three of our signature fundraising events – The Ball, Golf Outing, and Feed the Fight – exceeded their fundraising goals, and Annual Fund donations soared. The success of our fundraising efforts, combined with a healthy real estate market resulted in growth in our grantmaking, donor base, and endowment fund. I'm so proud of the hard work of our board, committee members, and staff that helped to make 2013 a tremendous year.

The Foundation Board of Directors is more committed to this cause than ever. Although we saw growth in our fundraising, we also received a record number of grant requests totaling nearly \$375,000. The need in our community is great! When you make an investment in the REALTOR® Foundation – personally, through a division, or through your company – your dollars are carefully invested to have the greatest impact on central Indiana's most vulnerable population. Learn more about the impact of your gift on page 6 and 7.

As we celebrate our 30th anniversary in 2014, I hope you will take this opportunity to get involved in your REALTOR® Foundation. See all the ways you can get involved on page 16.

Thank you for standing with the Foundation. Together we are linking hope to homeless.

Sincerely,

Gail Watts  
2013 REALTOR® Foundation President

## 2013 REALTOR® FOUNDATION BOARD OF DIRECTORS

**President**  
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Vicki Kenworthy Wright

**Immediate Past President**  
Bruce Bright

**Foundation Manager**  
Gabe Benson



2013 GRANT  
RECIPIENTS

- Coburn Place Safe Haven  
\$7,500
- Craine House  
\$10,000
- Damien Center  
\$6,600
- Dayspring Center  
\$8,000
- Gennesaret Free Clinic  
\$7,500
- Indianapolis Interfaith  
Hospitality Network  
\$10,400
- Pathway to Recovery  
\$10,000
- Progress House, Inc  
\$5,000
- Project Home Indy  
\$10,000
- Promising Futures  
\$7,500
- Sheltering Wings  
Center for Women  
\$10,000
- Turning Point Domestic  
Violence Services  
\$7,500

Find out more about our  
grantmaking at  
[www.realtorfoundation.org](http://www.realtorfoundation.org)

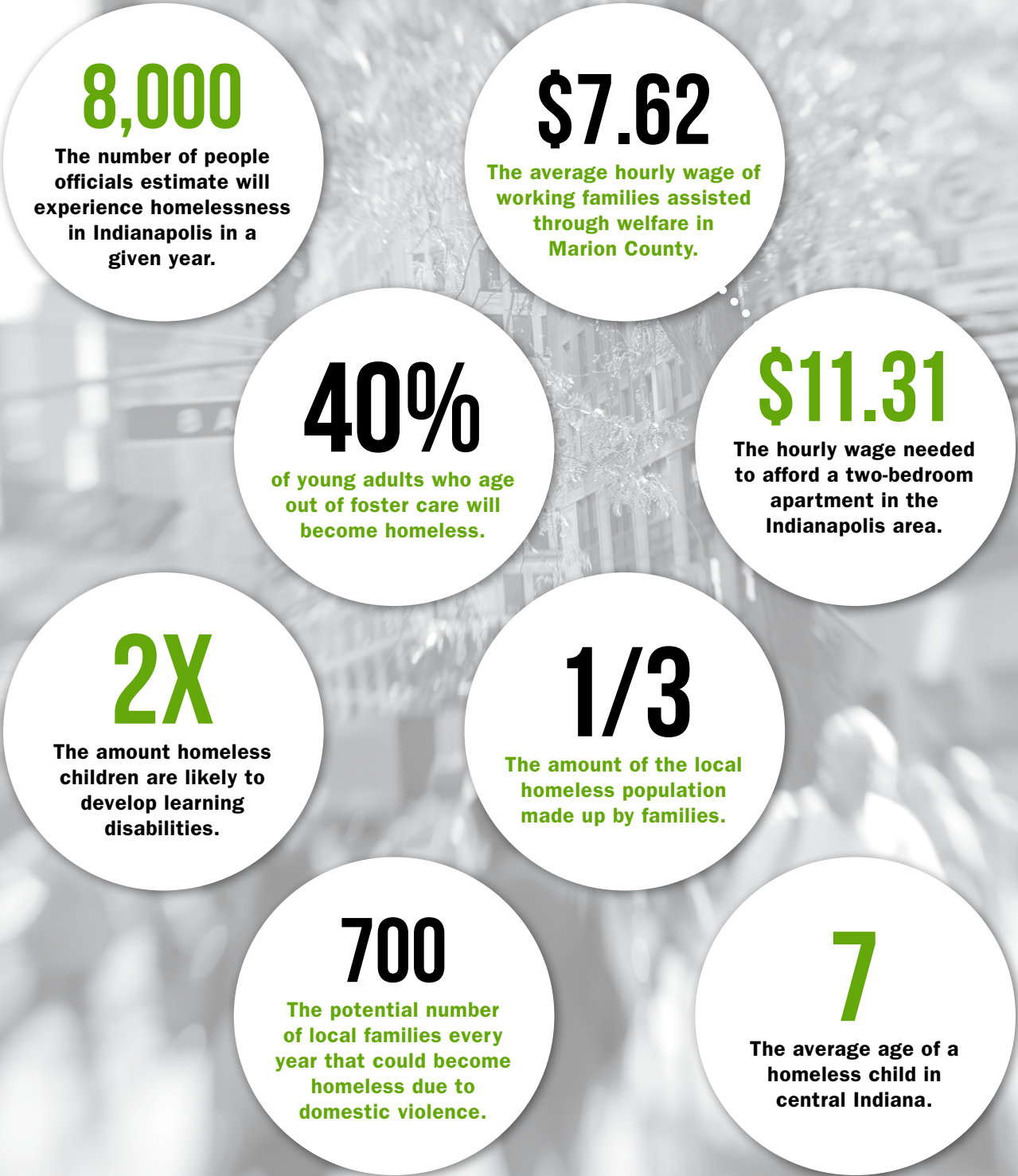


MOTHER GAINS HOPE AND HAPPINESS AT TURNING POINT

A young mother with two young children sought shelter and safety from her abusive partner. This victim had no family or friends in the state so she and her children were transported to Turning Point’s shelter. After arriving at shelter, she worked with staff to increase her safety and plan for her future. During her three week stay, staff assisted her in applying for her driver’s license, which her abuser did not previously permit, and finding employment. She also received domestic violence education and attended support groups. She left the shelter with a new found hope and the resources to start a new life for herself and her two children.

“I can’t even begin to thank you ladies enough for the incredible kindness you showed, and for all the selfless help you offered even beyond our stay at Turning Point. You truly helped change our lives and I am forever grateful. We are doing great and loving life and moving forward every day. Not a day has gone by that I don’t look back on my time with you all at the shelter in light, love and happiness, with a gratitude that I can’t even begin to express. You will forever be in my heart, and we will forever be safe. Thank you always and forever. Wishing you all the very best.” – Turning Point Domestic Violence Services Client

DID YOU KNOW?







# YOUR GENEROSITY IN ACTION

## DAYSPRING CENTER

Dayspring Center serves families at all stages of homelessness. Last year, Dayspring served 68 families comprised of 239 individuals including 151 children. Their 2013 grant supported the follow-up case management program. Many families exiting the Dayspring shelter leave with employment and permanent housing, but there are many other influences that lead to recurring homelessness. Dayspring's follow-up program empowers formerly homeless families with the life skills and resources they need to remain permanently housed and achieving their goals for stable, health living. Seventy-five percent of the families who participate in this program have remained housed an employed.

## CRAINE HOUSE

Craine House is a unique agency, offering non-violent women the ability to serve the remainder of their executed sentence along with their pre-school age and younger children. Craine House allows the women to live with dignity in a safe, structured, supportive environment, preserving the mother-child relationships, while they develop skills to improve their lives and better maintain their families and ultimately putting their children on a more positive life path. Craine House has attained a 20 percent recidivism rate — making our community safer and enabling young women who have made poor choices in the past to become responsible parents and more productive members of the community. Craine House used their 2013 grant to fund renovations to the women's and a children's rooms in their new facility. Their new facility dramatically increases the number of families they can serve and provides much needed programming space to facilitate support services.

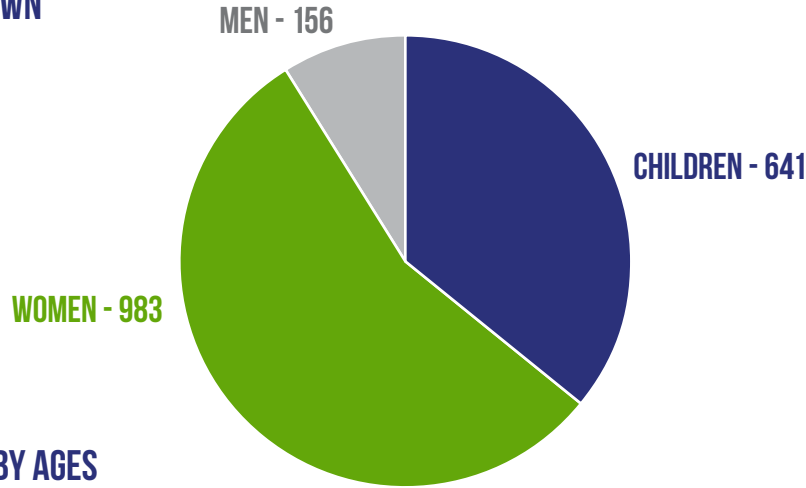
## INDIANAPOLIS INTERFAITH HOSPITALITY NETWORK

*(now Family Promise of Greater Indianapolis)*

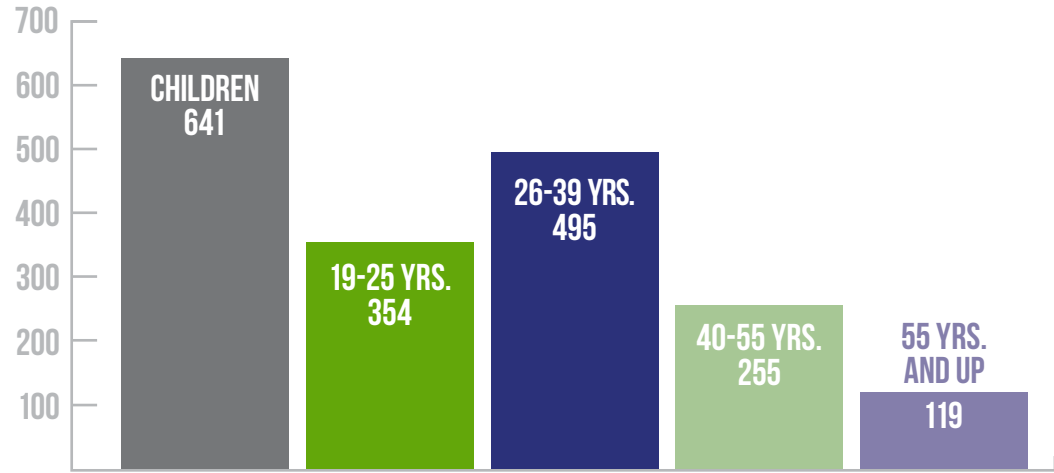
Indianapolis Interfaith Hospitality Network is a partnership of congregations and community organizations responding to the crisis of children and their families who are homeless. In 2013, IHN served 200 individuals in over 50 families providing shelter, guidance and friendship through their Day Center staff and over a 1,000 volunteers at about 30 hosting congregations. IHN helped about 65% of these families move into permanent housing. A grant from the REALTOR® Foundation was used to purchase new cots and mattresses for families seeking shelter. New beds offered dignity and comfort to these families and IHN was then able to provide the older, but still usable mattresses to families transitioning out of the program—effectively doubling the impact of a small investment.

# PEOPLE SERVED IN 2013

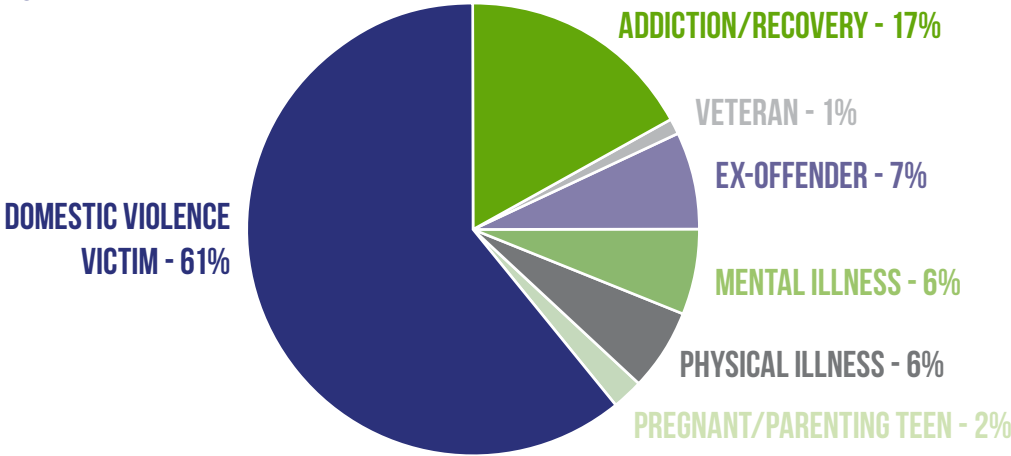
## BREAKDOWN



## SERVICE BY AGES



## SERVICE/TREATMENT





RESIDENT IMPACT

189  
individuals housed

69%  
were children

23  
current residents were original residents. Their lives have been stabilized for the past 2-3 years.

Six  
families came from homeless shelters.

One  
original resident is now a homeowner.

Building a Living Legacy:  
Centennial Project



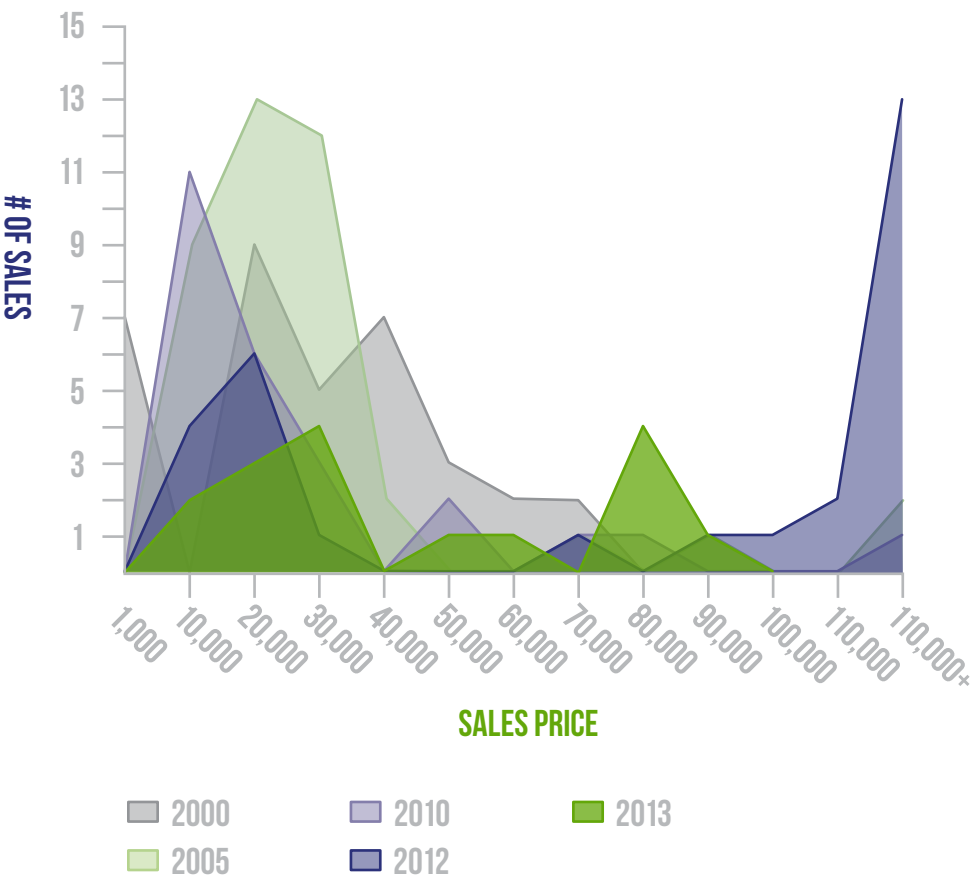
NEAR EASTSIDE IMPACT STUDY

MIBOR and The REALTOR® Foundation worked in partnership with the John H. Boner Community Center, Indy-east Asset Development Corp, and other partners for more than three years to renovate and/or build 32 homes, which (the number selected to represent 32 NFL cities) currently house 32 families coming out of, or on the verge of, homelessness. Each home provides permanent supportive housing on a continual basis with vital social services provided by the John H. Boner Community Center. In 2012, MIBOR members donated \$500,000 to lift up an emerging neighborhood in a project called Building a Living Legacy: Centennial Project.

The Building a Living Legacy housing initiative was one component of the larger 2012 Indianapolis Super Bowl Housing Legacy project, which involved a series of major capital investments across Indianapolis' Near Eastside.

In 2014, MIBOR released the Near Eastside Impact Study, which reviews the economic and social results of this investment. The impact study focuses on housing data and the overall community revitalization on the near eastside.

<http://www.realtorfoundation.org/near-eastside-impact-study/>



The chart above illustrates sales trends in the St. Claire Place neighborhood.

The project produced a spike in higher-end sales in 2012. Afterwards, sales spread out, making this neighborhood a place in which families from several income levels can choose to live.

*“When I think back to over two years ago when I was in the shelter...wow, it’s been a rough journey. I just feel so blessed. It’s been such a blessing to have someone believe in me. My children are happy with their new home, having a yard to play in, or, especially this winter, to build snowmen in.” “It is so nice to come home to my house, instead of going back to the shelter. Thank you.”*

- Teresa B., resident



# TOP TEN REASONS TO TRY TRANSACTIONAL GIVING

1. Small gifts can add up to a big impact
2. For many offices, it's as easy as filling out a box on the closing form
3. It's tax-deductible
4. Receive a year end statement for tax purposes
5. Make yours in honor of another agent or client
6. Save your own stamp – your office handles it all
7. A \$25 gift at one closing per month gets you listed on the Heroes of Hope wall in the MIBOR lobby
8. Your office could win a coveted award
9. Participation signals a commitment to your industry
10. You won't miss a few dollars, but central Indiana's homeless will benefit

Learn more at [www.realtorfoundation.org](http://www.realtorfoundation.org)

# DONORS MAKE THE DIFFERENCE ONE TRANSACTION AT A TIME

In 2013, 40 percent of donors to the Foundation made a gift in the form of transactional giving. The transactional giving program allows agents at participating companies to make a contribution to the REALTOR® Foundation or another designated charity directly from the closing form.

Each year, we award the Don “Pooch” Hunter Transactional Giving Award given in honor, and loving memory of, Pooch Hunter who was so dedicated to finding ways for REALTORS® to give to the Foundation in an ongoing way – through transactions.

Congratulations to Keller Williams Indy Metro North for winning both awards in 2013 for highest agent participation and dollars contributed!



We would not have been able to see such success without the support of our participating offices.

Carpenter, REALTORS®  
CENTURY 21 Scheetz  
ERA Real Estate Links  
F.C. Tucker Company  
Keller Williams Realty  
RE/MAX Ability Plus  
RE/MAX Legends Group  
RE/MAX Metro

Interested in making your gift at closing? Talk to your broker to learn more about this convenient way to give back to your community through the Foundation.

# CORPORATE PARTNERS STAND UP FOR THE CAUSE

It's rewarding for the Foundation leadership to know that we are forming lasting partnerships with companies inside the industry. It's that bond that keeps the Foundation's mission moving forward. We are very thankful for the companies that make the Foundation a priority. Without our sponsors and donors, the REALTOR® Foundation would not be possible.

Sponsorship opportunities are available for all of our fundraising events: The Ball, REALTOR® Foundation Golf Outing, Feed the Fight as well as the Foundation's Annual Fund. By underwriting our expenses, sponsor support helps increase the amount that is donated to organizations that support homeless people with shelter and services. Find a list of event sponsors on page 12 & 13.

# THANK YOU 2013 ANNUAL FUND CORPORATE SPONSORS

\$10,000

Chicago Title Insurance Company

\$5,000-\$9,999

Tish Flooring, Inc.

\$2,500-\$4,999

The National Bank of Indianapolis

RE/MAX of Indiana

\$1,000-\$2,499

Prudential Indiana Realty Group

Woodley Farra Manion Portfolio Management, Inc.







## THE BALL

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**Platinum**  
Amerifirst Home Mortgage

**Diamond**  
CoreLogic/MarketLinx  
Pulte Homes  
Prudential Indiana Realty Group  
Stonegate Mortgage

**Gold**  
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F.C. Tucker Co.  
First American Homebuyer's Protection/  
First American Title Insurance Co.  
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J.P. Morgan Chase  
Keller Williams Indy  
Metro North  
The National Bank of Indianapolis  
Prime Lending

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Ryan Homes  
Stockyard Bank  
Tom Wood Automotive  
Western Division of MIBOR

**Silver**  
Channelwood Mortgage  
Ryland Homes  
Hirons & Co.

**Friend of the Foundation**  
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Hendricks County Division of MIBOR

**Bronze**  
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Kristie Smith  
Meridian Title  
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Northside Division of MIBOR

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Sentrilock  
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Bob Lewis  
Roger Lundy  
Larry Mitchell  
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Nancy Smith

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Keith Bergfeld  
Diane Bussell  
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Mikie Collins  
Cheryl Davis  
Nancy Warfield Dewbrew  
Chris & Shari Dykes  
Jayne Gauci  
Dave Goff  
Jeromy Graft

Kathy Hall  
Mary Johnson  
Joe Kempler  
Susan Kent  
Rhonda Kuchik  
Denise Long  
Jeremy Long  
Elizabeth Marshall  
Brett Martin  
Larry Mitchell  
Joyce Moore  
Jason O'Neil  
Jodi O'Neill  
Nancy Patterson  
Chis Price  
Elizabeth Priller  
Ranj Puthran  
Jenny Rice  
Brandy Schroeder  
Bruce Shell  
Kristie Smith  
Nancy Smith  
Marcia Souers  
Kellie Stanley  
Kelly Todd  
Larry Wilson  
Lynn Wuethrich  
Steve Zachary

## 20TH ANNUAL GOLF OUTING

**Dinner Sponsor**  
Corelogic/MarketLinx

**Golf Cart Sponsor**  
Bailey & Wood Financial Group

**Golf Towel Sponsor**  
First Republic Mortgage Corp.

**Lunch Sponsor**  
New Hope Title

**Beverage Cart Sponsors**  
Affiliate Division of MIBOR  
Pulte Homes  
New Hope Title  
Security Home Inspections

**Beverage Station Sponsors**  
Davis Building Group  
Hendricks County Division of MIBOR  
Hamilton County Division of MIBOR  
F.C. Tucker Co.  
Prospect Mortgage

**Beat the Pro Sponsors**  
Hamilton National Title  
Heartland Golf Cars

**Premium Hole Sponsor**  
Commission Express  
New Hope Title  
Tom Wood Automotive Group

**50/50 Raffle Sponsor**  
Prudential Realty

**iPad Raffle Sponsor**  
HWA Home Warranty

**Second Change Scorecard Sponsor**  
Channelwood Mortgage

**Driving Range Sponsor**  
Hirons and Company

**Goodie Bag Sponsor**  
CENTURY 21 Scheetz

**Contest Hole Sponsors**  
2-10 Home Buyers Warranty  
Access National Mortgage  
Channelwood Mortgage



Hallmark Home Mortgage

HouseMaster Home Inspection

John Q. Herrin

Meridian Title

Parker Mortgage Group

Prime Lending

**Hole Sponsors**

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Hirons and Company

INHP

J.P. Morgan Chase Bank

Keller Williams Indpls

Metro North

MainSource Bank

Merchants Bank of Indiana

M/I Homes

Movement Mortgage

Nations Title Agency

Pyatt Builders

RedLinxs

Security Title

Stewart Title

T&H Realty Services

## FEED THE FIGHT

**Top Gun**  
Burton's Flooring

**Mission Match**  
Bailey & Wood Financial Group

**Above the Crowd Discovery Flight**  
RE/MAX of Indiana

**Iceman Bar**  
University Lending

**Maverick**  
J.P. Morgan Chase Bank  
Pulte Homes  
Security Home Inspections  
Stonegate Mortgage

**Goose**  
Access Valuation  
Channelwood Mortgage



Connie Dixon/First Financial Bank  
HouseMaster Home Inspection

Prime Lending  
Indiana Residential  
In Partnership with Tom Wood Automotive Group



## ANNUAL FUND HEROES OF HOPE

*\*Designates Individuals who have made donations in the past 5 consecutive years. Thank you for your loyalty!*

### \$5,000+

CENTURY 21 Scheetz  
Legacy Foundation

### \$2,500-\$4,999

John Abernathy\*  
Jim Litten and the F.C  
Tucker Company\*  
Hamilton County  
Division of MIBOR  
Kaye Hirt-Eggleston\*

### \$1,000-\$2,499

Mike Bentley  
Dan & June Bowden\*  
Steve Burkhardt\*  
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Grace Colette\*  
Luis C. Coronel  
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MIBOR  
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Kathy Hall\*  
Dean & Rita Hicks  
Tracy & GR Hutton\*  
Keller Williams Carmel  
Cares  
Joan Lonnemann  
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MIBOR  
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Ranj Puthran  
Randy R. Scheidt\*  
Women's Council of  
REALTORS®  
Lynette Wuethrich\*

### \$500-\$999

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Paul Starr  
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David Zeyen



# TEN GREAT WAYS TO BE INVOLVED

- 1 **Connect a nonprofit who fits our mission**
- 2 **Invite a Foundation speaker to your meeting**
- 3 **Come to one of our signature events**
- 4 **Commit to a gift at closing through transactional giving**
- 5 **Include the Foundation in your will**
- 6 **Host a fundraiser to benefit the Foundation**
- 7 **Join Team Foundation to be an advocate for our mission**
- 8 **Volunteer with us**
- 9 **Ask your company to be a corporate sponsor**
- 10 **Share our social media messages**

LEARN MORE AT [WWW.REALTORFOUNDATION.ORG](http://WWW.REALTORFOUNDATION.ORG).

LOOK FOR US ON:  

## OTHER WAYS TO GIVE

There are many different ways to make a gift to The REALTOR® Foundation, some of which may be particularly advantageous to you as an individual donor and to the Foundation. Your own attorney or financial adviser should be consulted during your next meeting as to the best plan of action for you. Consider one of these giving vehicles.

**Stock Gifts** – If you own shares of stock that you no longer need, donating them to the REALTOR® Foundation may allow you to take a substantial tax deduction. Your bank or broker may contact us for transfer instructions.

**Bequests**– As you prepare your will, please consider designating a set amount or percentage as a bequest to the REALTOR® Foundation. Bequests are the simplest kind of planned gift!

**Real Estate** – Consider a gift in honor of your industry. Avoid capital gains tax on the sale of a home or other real estate. Gifts of real estate that are owned free of any liens or encumbrances and able to be transferred with clear title will be accepted.



The REALTOR® Foundation is pleased to recognize those who initiate a legacy gift. The **Key Circle** is a special group of REALTOR® Foundation supporters who are committed to supporting the Foundation through an estate or planned gift. **Key Circle** members are unlocking the doors to hope for central Indiana's homeless in perpetuity. For more information, contact the Foundation office at (317) 956-5255.

Additionally, many of our grant recipients appreciate donated goods throughout the year. If you wish to make an in-kind donation, contact the Foundation office at (317) 956-5255 to be connected with the right organization.

The REALTOR® Foundation is a 501(c)3 not-for-profit organization and donations are tax-deductible to the extent allowed by law.



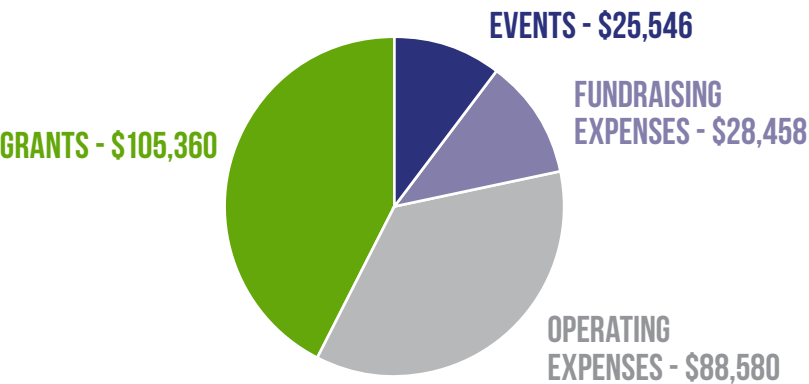
## 2013 FINANCIAL HIGHLIGHTS

We had an amazing year for fundraising! Our annual fund exceeded goal by 20%. We were able to increase our grantmaking to \$105,000 distributed to 13 organizations. We ended the year with a net income of \$102,032 which will be added to our endowment fund to support our mission in perpetuity. Market gains added an additional \$154,284 to the value of our investment portfolio.

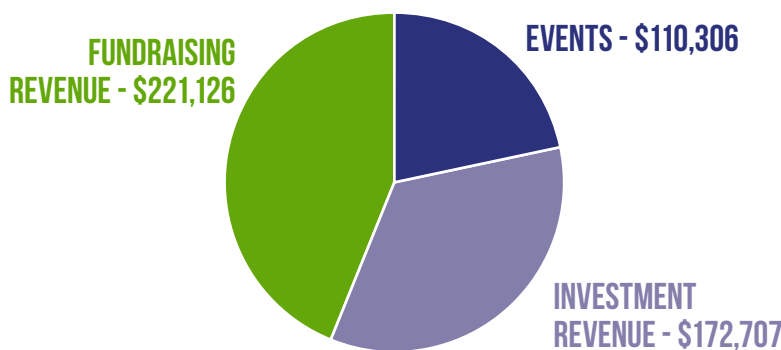
It is important for the REALTOR® Foundation to ensure its financial integrity is kept to the highest standards. We are careful stewards of every dollar we receive and manage our finances as conservatively as possible. We take our role as the stewards of your good faith and benevolence very seriously and strive to place your investment in the hands of quality and effective organizations.

Detailed financial statements are available upon request.

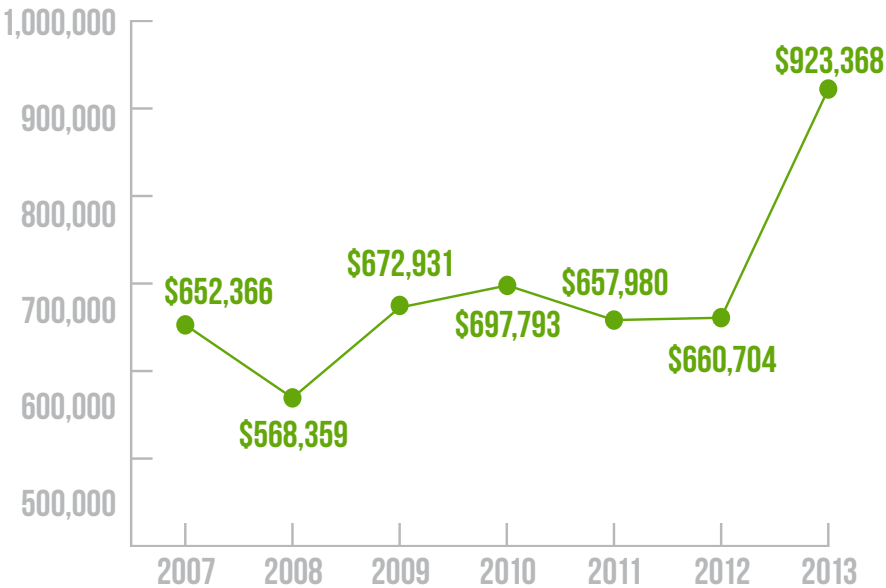
### EXPENSES



### INCOME



## ENDOWMENT GROWTH



## ENSURING THE FUTURE

Annual fundraising efforts have allowed the Foundation to maintain its annual grant making at a \$100,000 minimally each year. But the need is far greater—and growing. In order to make the greatest impact while planning for the future, the Foundation aims to grow the organization's endowment fund.

The growth of the endowment is critical to the long term sustainability of grant making. Endowment funds are a critical source of support for a nonprofit organization, like the REALTOR® Foundation. Our goal is to continue to grow the endowment and at a point begin to utilize investment earnings to increase our grantmaking capacity.

Our endowment grows through gifts directly allocated to the endowment, memorial contributions, planned and estate gifts, realized and unrealized market gains, and the Foundation's net income at year end. Learn more about unique giving strategies to help grow our endowment on page 17.





**June 28, 2014**



**September 18, 2014**



**January 17, 2015**



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