



2021

ANNUAL REPORT



South Bend Heritage



South Bend Heritage

All of us were tested once again in 2021 as we emerged from the pandemic. Despite the setbacks that affected our construction schedules, budgets and programs, SBH delivered amazing results throughout the year. We continued to give back by providing over \$25,000 in direct rental support to our community through the Audrey G. Ratner Housing Fund. We also supported families in their journey to purchase our affordable homes. Joyously, we began construction on Hope Avenue Homes, Hoose Court Townhomes and Chapin Street Apartments. We completed our third Permanent Supportive Housing Institute in anticipation of building SB Thrive in collaboration with the Youth Service Bureau. Our partnerships with the Northeast Neighborhood Revitalization Organization (NNRO) and Rebuilding Together advanced work on a Community Land Trust (CLT) and delivered over \$150,000 of critical repairs to senior homeowners.

We are so proud of our property management teams and their dedication to serving the residents living across our seven rental apartment communities. Everyday, they do their best to assist hundreds of families and individuals by delivering critical programs and services.

Of course, we couldn't achieve these amazing accomplishments without the support of Mayor Mueller's administration as well as our donors and partners. We are extremely grateful for the support of our community and we're looking forward to giving you more awesome news in 2022.

Please enjoy the highlights from 2021 in this annual report.

Respectfully,

Johnathan Wingfield
Board President

Marco Mariani
Executive Director



Executive Director Marco Mariani gives a tour of Hope Ave Homes to key project supporters.

OUR PURPOSE

Established in July 1974, South Bend Heritage Foundation, Inc. (SBH) is a not-for-profit service and community development corporation that is committed to the stabilization and enhancement of our neighborhoods.

Purpose: To enhance the beauty and value of neighborhoods and empower residents, through collaboration, physical transformation, advocacy and education.

Vision: A united community where diverse neighborhoods are considered choice places to live, as well as to operate a business, and where all residents have equitable and just opportunities to reach their full potential.

Our Non-Profit Partners



In 2021, we assisted in managing the rehabilitation of 12 homes for low-income elderly and disabled homeowners in our community, despite setbacks from the pandemic. Volunteers from the skilled trades and community assisted in improving the homes.



In 2021, the NNRO launched an Owner-Occupied Repair Program for low-income and elderly homeowners in the Northeast Neighborhood, completed and sold 702 St Louis Blvd, and worked to create the first Community Land Trust in South Bend.

2021

YEAR IN REVIEW



Despite pandemic related complications, construction progressed on South Bend's second Permanent Supportive Housing project, Hope Ave Homes, to serve individuals experiencing homelessness.



The Charles Martin Youth Center received a new parking lot, as well as interior upgrades, thanks to the generous support of the City of South Bend and Community Foundation of St. Joseph County.



SBH supported numerous resident engagement activities for our 500+ residents, including a Halloween Party at Oliver Apts and an Art Day at Washington-Dunbar Homes.





Launched an Owner-Occupied Repair program in partnership with the NNRO, the City of South Bend, and Old National Bank in the Northeast Neighborhood.



Sold 4 new construction and rehabilitated homes to first-time, low-income homeowners.



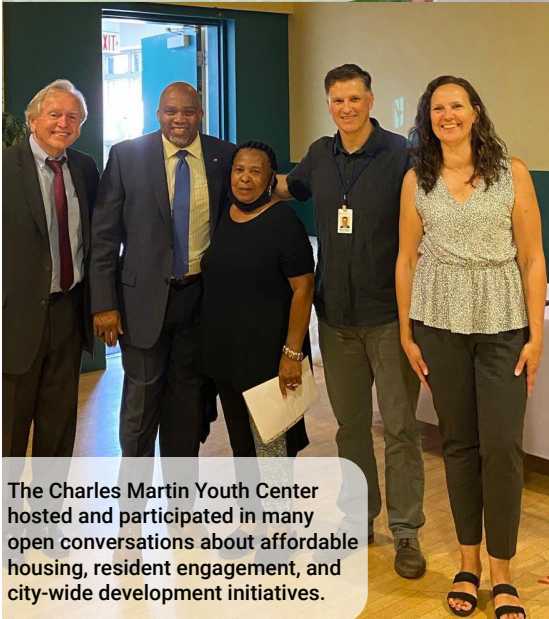
Audrey G Ratner Housing Fund

South Bend Heritage

The Audrey G. Ratner Housing Fund provided \$25,000 in rent relief for residents across the SBH rental portfolio.



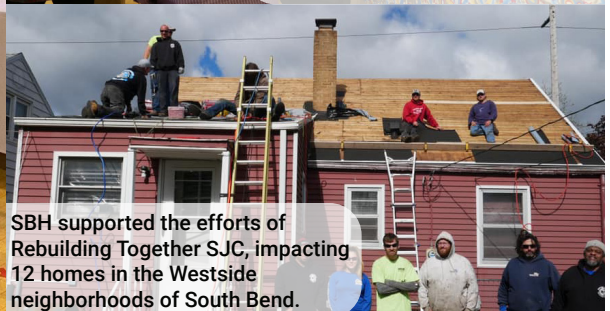
SAVED! 615 LaSalle was renovated back to into a wonderful single-family home after years as problem property tri-plex rental.



The Charles Martin Youth Center hosted and participated in many open conversations about affordable housing, resident engagement, and city-wide development initiatives.



The Colfax Gallery returned to in-person gallery receptions, hosting six exhibitions, include the annual Art & Social Justice show.



SBH supported the efforts of Rebuilding Together SJC, impacting 12 homes in the Westside neighborhoods of South Bend.



HOOSE COURT

South Bend is in urgent need of affordable housing, and the demand for low-moderate income housing for families continues to grow across the city. South Bend Heritage Foundation is actively working to create more housing opportunities for families to ensure that all have access to safe and affordable housing. This includes the new-construction rental units in South Bend's Near Westside neighborhood, located at the corner of Hoose Court and Scott Street. This is the first affordable development this area of South Bend has seen in decades, and it is desperately

needed, given the affordable housing shortage. The project features four 3-bedroom, 2-bath units across two buildings and is tailored for families. This project, in combination with Hope Ave Homes, Chapin Street apartments, Gemini Apartments, and SBH's current inventory for affordable rental housing, will make a dent in the growing waiting list of families in need of affordable housing. Hoose Court is anticipated to be open to families in Fall of 2022, and was made possible by the support of the City of South Bend and partnership of Lake City Bank.

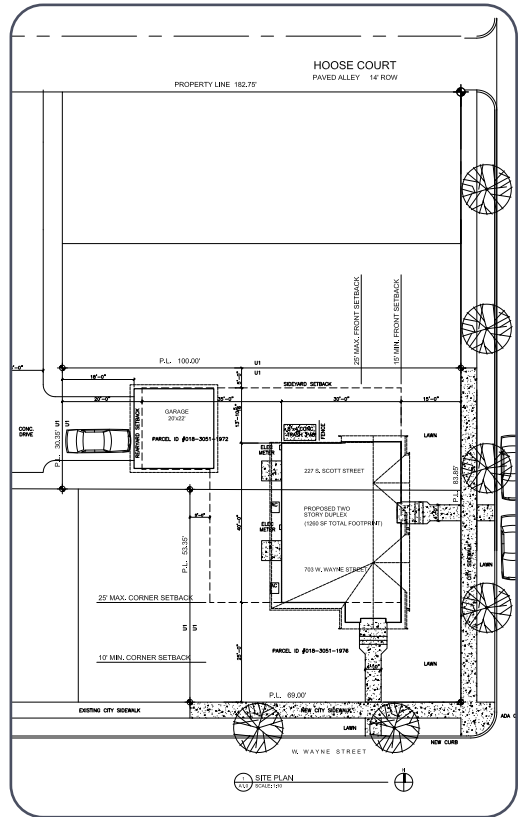
PROJECT DETAILS

- » Approx 4,800 Sq Ft Total across 2 Duplex Buildings, 2 Stories Each
- » 3-Bedroom, 2-Bath Units, 1,200 Sq Ft each
- » \$900,000 Total Investment
- » Designed and tailored for low-moderate income families
- » Expected completion Fall 2022
- » Use of Local & Minority Contractors

Thank you to the City of South Bend for the generous support of the Hoose Court development.



Project Financing Provided by **Lake City Bank**
Member FDIC



Architect, Pat Lynch visits Hoose Court during construction.



RENTAL REHABILITATION

Over its nearly 50 year history, South Bend Heritage has managed over 500 rental units across the city of South Bend. Most of these units, from the larger apartment communities at Washington-Dunbar and New Heritage Homes, to scattered site locations, have been rehabilitated by South Bend Heritage to ensure safe, decent, and affordable housing for low-moderate income families. Rental rehabilitation and facilitating the growth of high quality rental housing continues to be a key aspect of the mission for South Bend Heritage vision.

The primary goal of rental rehabilitation is to increase the supply of affordable housing through the renovation of existing housing stock or the adaptive reuse of buildings. Rental rehab targets housing stock that will enhance the neighborhood when it is rehabilitated, providing positive economic and physical transformation for the community.



Executive Director Marco Mariani, Architect Pat Lynch, and a City of South Bend representative Sante Garces talk about plans for Chapin Street rental rehab.



Throughout 2021, South Bend Heritage worked at Chapin Street and Historic Gemini Apartments to renovate several apartment units. The wait list for quality, affordable units in South Bend is long, but leasing these units will provide much needed rental housing for many families. In conjunction with our new construction single family homes, rental production provides more quality affordable housing for a wide variety of households, including that were experiencing homelessness.

CHAPIN STREET PROJECT DETAILS

- » Total gut of the upstairs space and conversion into two units
- » 2 - One Bedroom, One Bath Apartment Units
- » Approx 900 Sq Feet Each
- » Brand new mechanical systems, windows, carpentry, and flooring





COLFAX GALLERY

South Bend Heritage believes that the engagement in and enjoyment of the arts can and should be universally accessible for all. The inception of the Gallery in the mid-1980s realized this goal, and the Colfax Gallery has become an integral part of the SBH purpose to enhance the beauty and value of our community.

Owned and curated by South Bend Heritage (SBH) and the Colfax Gallery Committee, which includes local artists and art educators, the Gallery hosts 6 exhibitions per year, with each show highlighting both new and seasoned artists, exploring culturally-relevant themes, and, most importantly, providing opportunity for the local community to engage in the arts in a unique and approachable venue.

In 2021, the Colfax Gallery was

generously supported by multiple grants to support arts programming, as well as provide interior upgrades to the building. In 2022, the Gallery will see repairs made to its mechanical systems, roof, and exterior facade, as well as receive a much needed interior face lift with new furniture and other upgrades.

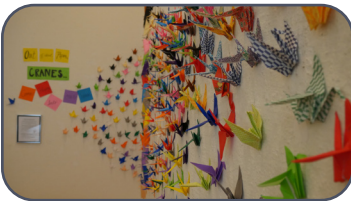


THE GALLERY SEASON



"On Exhibit" Series

The "On Exhibit" exhibition series offers space for artists who live and work within 50 miles of South Bend, with each artist exploring unique themes. This series has provided opportunities for new artists and experienced artists alike. Each season has three "On Exhibit" shows, featuring three artists each.



Middle School Exhibition

The Middle School Art School Exhibit demonstrates that our public schools foster extensive talent in the visual arts, as well as encourages young and budding artists to explore their talents in a wide array of visual arts. Over 100 students from the local middle schools provide artwork for this special show.



Community Arts Organization Show

The Community Arts Organization exhibition invites a community or society of artists to exhibit as a collective body of artists. The 2021 show featured the St Joseph Valley Watercolor Society, with approx 50 artists displaying work.



Art & Social Justice

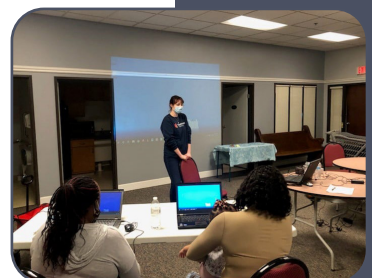
"Art and Social Justice" was the title of a joint exhibition of work by artists Jake Webster and Douglas Kinsey. The theme, a socially just world, is particularly reflective of South Bend Heritage Foundation's mission and therefore inspired this annual juried exhibition. The annual Art and Social Justice Exhibition has become a significant and anticipated Colfax Campus Gallery event and exhibits over 50 artists from the four-state area.



RESIDENT SERVICES

According to the National Aging in Place Council, there are three components that are needed to ensure older adults can successfully age in place: the place, including home modification and community environment; the person, which ranges from finances, daily activities, and healthcare to recreation and spirituality; and the support network, which includes being involved in a community, friends and family, and continuing education. For more than 20 years, South Bend Heritage has aimed to enhance the lives of low-income senior residents in South Bend by providing aging in place programs that successfully meet these goals. These programs provide supportive services that offer opportunities for engagement, education, and continued socialization to ensure our neighbors live a life full of dignity as they grow older.

In 2021, South Bend Heritage provided a wide variety of activities for our senior residents at Robertson's, Oliver and Rushton apartments, including weekly Bingo, computer literacy programs, healthcare resource fairs, potlucks and community luncheons, food and household supply pantries, and more. Thanks to a special grant from AARP, in 2022 South Bend Heritage will revitalize the alleyway next to Robertson's to create a functional outdoor community space for our residents to enjoy.



Rosie Leyva, Director of Property Management, poses with a Robertson's resident.



SUPPORT & PARTNERS

FRIENDS OF THE FOUNDATION

Alliance Architects, Inc.
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Arvid and Jane Zenk
Bellwether Enterprise Real Estate
Capital, LLC
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Thomas & Eileen Hughes Family Fund
Tim Mehall
Tom & Anita Veldman
Toy Villa
William Lamie
William Weeks III
William Welsheimer, Jr.

GRANTING PARTNERS

AARP
Beacon Community Impact
City of South Bend:
Community Development
Block Grant
HOME Funds
Centene Corporation
Community Foundation of
St. Joseph County:
ArtsEverywhere Philanthropic
Fund
Robert P. & Clara I.
Milton Fund
St. Joseph County Housing Consortium
Indiana Arts Commission

Indiana Housing & Community
Development Corporation
Judd Leighton Foundation
NeighborWorks America
South Bend Community
School Corporation
United Way of St. Joseph County
Wells Fargo Wealth
Management Group:
Robert P. & Clara I. Milton
Charitable Trust
Stanley A. and Flora P. Clark
Memorial Trust Foundation
Florence V Carroll Charitable
Trust
John, Anna, and Martha Jane
Fields Trust Foundation

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Beacon Health Systems
Community Foundation of St. Joseph
County African American Fund
Episcopal Diocese of Northern
Indiana
Four Winds Casino
Indiana Michigan Power
Indiana University South Bend
KeyBank
Mel Hall
Saint Joseph Health System
University of Notre Dame

**Thank you to our 2021
major funding partners:**



Mayor James Mueller



St. Joseph County

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Teresa Gilbride
Elizabeth Leachman
Rosie Leyva
Patrick Lynch
Marco J. Mariani
Jackie Martin
Safa Saddawi

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Anthony Clark
Kevin Colbert
Sidney Forrester Jr
Gloria Murphy
Brian Martin
Tanesha Scruggs
Maria Velazquez



In Memoriam

Susan (Zenk) Miller

February 23, 1949 – May 10, 2021

Suzie was a deeply caring person and passionate supporter of South Bend Heritage. Her profound connection to our work began in the 1970's when she and Tom purchased the Frank Lloyd Wright designed K. C. DeRhodes House on West Washington Street. After retiring from Indiana University, Suzie served as an amazing South Bend Heritage staff member for many years. We are forever grateful for her many talents and devoted friendship.



STATEMENT OF FINANCIAL POSITION AS OF DECEMBER 31, 2021

ASSETS

Cash	\$2,327,475
Receivables	\$865,822
Real Estate Held for Resale	\$261,915
Capital Assets	\$26,045,710
Other Assets	\$158,735
Operation & Replacement Reserves	\$1,851,663
Investments in Subsidiaries	\$86,159
TOTAL	\$31,597,479

LIABILITIES & NET ASSETS

Accounts Payables & Accruals	\$2,906,092
Long Term Liabilities	\$8,497,087
Net Assets	\$11,438,373
Non-controlling Interest	8,755,927
TOTAL	\$31,597,479

REVENUE

Grants & Contributions	54.59%
Management and Project Fees	3.96%
Rents	35.33%
Other Income	6.12%

EXPENSES

Program	81.58%
Management & General	17.67%
Fundraising	00.75%

FROM AN AUDACIOUS VISION BORN AMONG FRIENDS IN A DELAPIDATED OLD HOUSE, SOUTH BEND HERITAGE WAS FOUNDED UPON UNIQUE, BOLD DESIGNS AND THE VALUES OF TRUST AND ACCOUNTABILITY. OVER FOUR DECADES LATER, THAT PASSION IS STILL AT THE CORE OF THE ORGANIZATION.

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