

Lincoln Financial Foundation, Inc.

Last profile update: 12/22/2016

Last grant data update: 01/21/2017

At A Glance

(formerly Lincoln Financial Group Foundation)

1300 S. Clinton St.

Fort Wayne, IN United States 46802-3506

E-mail: Deb.Washler@LFG.com

URL: www.lfg.com/public/aboutus/lincolnfinancialfo...

Type of Grantmaker

Company-sponsored foundation

Financial Data

(yr. ended 2015-12-31)

Assets: \$5,242,680

Total giving: \$9,318,347

EIN

356042099

BRIDGE Number

4308254166

990

[2015](#) [2014](#) [2013](#) [2012](#) [2011](#) [2010](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

Background

Established in 1962 in IN as a company-sponsored operating foundation

Limitations

Giving limited to areas of company operations, with emphasis on Hartford, CT, Fort Wayne, IN, Greensboro, NC, Omaha, NE, Concord, NH, and Philadelphia, PA.

No support for religious organizations, public or private elementary or secondary schools or school foundations, hospitals, hospital foundations, fraternal, political, veterans', or sports organizations.

No grants to individuals, or for endowments, continuing support, general operating support, capital campaigns, debt reduction, marketing programs, sporting events or tournaments, fundraising for national organizations, or national walks; generally, no grants for tickets, corporate tables, or testimonial events.

Purpose and Activities

The foundation supports programs designed to promote the arts; youth education; human services; and workforce and economic development.

Program Area(s)

The grantmaker has identified the following area(s) of interest:

Arts

The foundation supports programs designed to promote arts education through increased access to the arts and cultural activities for individuals of all ages, economic strata, varying abilities, and ethnicities.

Economic and Workforce Development

The foundation supports programs designed to promote adult education, job skills training, and opportunities to enhance the workforce with intent increase economic development s for the area. Special emphasis is directed toward job creation and a trained workforce for in-demand occupation; opportunities to create and grow local businesses; and adult programs that provide advancement through GED, financial literacy, English as a second language, and entrepreneurial thinking and skills that lead to a productive life.

Human Services

The foundation supports programs designed to address basic needs for food, housing, and independent living. Special emphasis is directed toward food programs that provide meals for low-income families and individuals; housing programs that provide emergency and transitional housing opportunities; and self-sufficiency programs designed to enable individuals to

develop a skill set that will lead to an appropriate level of self-reliance and independent living.

Lincoln Matching Gift Program

The foundation matches contributions made by full-time employees, retirees, and financial planners of Lincoln Financial Group to institutions of higher education and nonprofit organizations.

LIVE

Through LIVE (Lincoln Invests in Volunteer Experience), the foundation awards \$500 grants to nonprofit organizations with which employees of Lincoln Financial Group volunteer at least 50 hours.

Youth Education

The foundation supports programs designed to promote life-long learning with an emphasis on financial literacy and improving student achievement. Special emphasis is directed toward pre-K programs designed to prepare children to enter kindergarten ready to learn and be academically successful; K-12 programs designed to increase achievement, successful course completion, and high school graduation rates; and college programs designed to increase student success in college entrance, transition, and completion.

Fields of Interest

Subjects

- Adult education
- Adult literacy
- Arts and culture
- Arts education
- Business and industry
- Domestic violence shelters
- Early childhood education
- Economic development
- Education
- Education services
- Elementary and secondary education
- Employment
- ESL and second language acquisition
- Financial counseling
- Food aid
- Food banks
- High school equivalency
- Homeless services
- Housing development
- Human services
- Independent living for people with disabilities
- Job training
- Leadership development
- Nonprofits
- Reading promotion
- Student retention
- Temporary accommodations

Population Groups

- Academics
- Children
- Children and youth
- Economically disadvantaged people
- Low-income and poor people
- Retired people
- Seniors

Organizations

- Public charities

Geographic Focus

- Connecticut
- Indiana
- Nebraska
- New Hampshire
- North Carolina
- Pennsylvania

Support Strategies

- Program development
- Sponsorships

Transaction Types

- Employee matching gifts
- Employee volunteer services
- Matching grants

Publications

- Application guidelines
- Grants list

Application Information

Applications are reviewed by local Charitable Contribution Committees. Visit website for nearest application address. Support is limited to 1 contribution per organization during any given year

Application form required.

Applicants should submit the following:

1. Listing of board of directors, trustees, officers and other key people and their affiliations
2. Copy of IRS Determination Letter
3. Copy of current year's organizational budget and/or project budget
4. Copy of most recent annual report/audited financial statement/990

Initial approach: Complete online application form for specified cities

Copies of proposal: 1

Board meeting date(s): Quarterly

Deadline(s): July 15 for Education; Apr. 15 for Human Services; Oct. 15 for Workforce and Economic Development; and Jan. 15 for Arts

Final notification: 3 to 4 months

Donor(s)

Note: If a donor is deceased, the symbol (‡) follows the name.

- Lincoln National Corp.
- The Lincoln National Life Insurance Co.

Officers and Directors

- Lisa M. Buckingham, Chair. and Director
- Nancy Rogers, Pres. and Dir.
- Sharon M. Jeffers, Secy.
- Mark E. Konen
- Randy Freitag

Staff

Number of Staff

1 full-time professional

5 part-time professional

1 full-time support

Key Staff

Note: Does not include officers.

- Marlene Ferreira, Prog. Off., Hartford, CT
- Deb Washler-Jackson, Prog. Off., Fort Wayne, IN
- Byron O. Champlin, Prog. Off., Concord, NH
- Jana Barrett, Prog. Off., Greensboro, NC
- Susan Segal, Prog. Off., Philadelphia, PA

Memberships

Regional Associations of Grantmakers

- Connecticut Council for Philanthropy
- Indiana Philanthropy Alliance
- Philanthropy Network Greater Philadelphia

Associations and Other Philanthropic Organizations

- Council on Foundations, Inc.

Financial Data

Year ended 2015-12-31

Assets: \$5,242,680 (market value)

Gifts received: \$9,636,044

Expenditures: \$9,207,528

Total giving: \$9,318,347

Qualifying distributions: \$9,318,347

Additional Location Information

County: Allen

Metropolitan area: Fort Wayne, IN

Congressional district: Indiana District 03

Generated on 2017-03-20