



WHY A COMMUNITY FOUNDATION?

A short history of the Community Foundation of Grundy County

In 1999, ten leaders of the Morris community gathered to think about the challenges to the future of our community. It is ironic that many of the concerns today are the same as those that faced these men and women. The initial goal was to look at issues that local government or charities could not or would not address for one reason or another.

After a decade, what began as the Morris Community Foundation has matured into the Community Foundation of Grundy County. From a volunteer organization with no staff, no assets, and very little idea what a community foundation could do, the Foundation has grown to employ a full time executive director, a part-time program director, and an accounting manager who, with a volunteer board of 11, oversee almost \$5 million in assets devoted to the maintenance and improvement of the quality of life of Grundy County. In addition, the Foundation is the only not-for-profit in Grundy County which meets the “National Standards” of the Council of Foundations regarding governance and financial stewardship.

While the Foundation’s growth has been possible only because of community support, its impact has improved the lives of hundreds of children, helped countless disadvantaged who are in need of social services, and has brought focus to land use and planning across the county.

However, the biggest winners in Grundy County have been the other not-for-profit organizations. The Foundation’s role as a convener has brought together childcare providers through the Grundy Partnership for Children, convened agencies and private industry concerned with workforce issues through the Business Education Council, and networked elected officials & government planners through the quarterly Planners Breakfasts and annual Grundy County Growth Conference. In addition to networking and partnering with not-for-profits around programs and services, the Foundation stewards over \$500,000 in endowments to benefit such organizations as the Morris Hospital, the Morris Area Public Library, the Morris Family YMCA, and various church, music, and youth organizations.

Community Leadership

This decade of impact came about because of the vision of the first board of directors. Under the leadership of Jim Baum as President and directors Jim Peterson, Dick Schweickert, Joe Schmitz, Carol Narvick, Rev. Chuck Richardson, Dr. Ann Marie Struck, Bill Norton, Finance Advisor Ron Wohlwend, and Legal Advisor Jack Hynds, the first board of directors began the tradition of looking at the community with fresh eyes to see how to meet unseen and unresolved problems.

Since the beginning, the Foundation's by-laws have specified that directors shall be chosen from the most capable members of the community who have demonstrated their desire to give back to our community. The diversity of the board, a mix of men and women from different churches, industry, social backgrounds, and geographic home in the county has become a hallmark of board of directors over the years. In fact, most of the members had never worked together on other boards and were not friends socially until uniting at the Foundation.

Community Redevelopment

In the early '90s, two important community projects were the redevelopment of the old Commonwealth Edison property along the I&M Canal and the abandoned Rock Island railroad station at the north end of Liberty Street. These two properties anchor the ends of downtown Morris and were purchased by the Foundation. The old ComEd building and construction were cleared to make way for a park which includes a replica of a canal packet boat called the "Heritage." After the redevelopment, the entire property was given to the City of Morris and is now Canal Port Park.

The second redevelopment project was the purchase of the site on Liberty Street which included a grain elevator, weigh station, and the old railroad depot. The Foundation hired a railroad planning firm who recommended a historic remodeling of the station and the demolition of the other buildings. The depot renovation was completed with a lease/purchase agreement as a new office for the Grundy County Chamber of Commerce. The rest of the property was donated to the City of Morris who worked with the Rotary Club to develop it into Rotary Park.

The Foundation gave over \$1,000,000 of property value back to the community through the rescue and redevelopment of these blighted properties which are now the bookend jewels of downtown Morris.

Challenges of the Future

In 2000/2001 the Foundation explored the need for a Park District. This is a wonderful example of a project that no one else would tackle. After a series of community meetings and an opinion survey of needs and interest, the Foundation recommended that interested citizens petition for a special election to form a Park District. The election was held and the proposal was defeated. Although disappointed, the Foundation learned a great deal from

the organization of public forums and this experience was the genesis for a series of public meetings called “Challenges of the Future.”

In 2003 the Foundation produced a 40-minute video called “Challenges of the Future” highlighting education, health care, planning, and environmental health. This video was shown in a public event which was followed by a panel discussion with leaders of local government and industry. Over the next three years, the Foundation organized public forums with 3-6 person expert panels on the topics of Subdivision Design, Environmental Health, Local Solutions for Public School Funding, and Water Supply and Stormwater Management.

A New Focus – Communityworks

In 2003, the Foundation was selected by the Grand Victoria Foundation in Chicago to partner in a program called “Communityworks.” After a year of study, Grand Victoria concluded that community foundations have the potential to make a greater impact on the quality of life across Illinois than any other community organizations. Eighteen community foundations were selected to participate and focus on three areas of concern across Illinois: (1) childcare and early childhood education, (2) workforce development, and (3) land use and protection. Staff spent over a year assembling an Advisory Committee, studying the issues, hosting public meetings, and developing a plan of action called “Connecting the Visions: An Impact Plan for Communityworks.” It was debuted at a public forum in September 2006 and remains a guiding plan for the Foundation.

The Morris Community Foundation board wrestled with participation because of the fear of being micro-managed by Grand Victoria and having too many hoops to jump through. Some concerns were justified, but, frankly, in hindsight we appreciate that the requirements caused our foundation to become more professional through the adoption and implementation of “best practices” in governance and financial management. The first requirements were to hire a full-time executive director and rent our first office. In late 2008, part-time staff positions were added in program development and financial management and we moved our office to a first-floor location for better visibility.

Promoting Philanthropy

However, it was the training and education that we received through Communityworks that produced the most important changes. Our original philosophy was to see a need, raise the money, and spend it right away. The concept of “endowment” was foreign to our way of thinking. Slowly we began to realize that short-term fund raising was really a band-aid when a longer vision is necessary to meet the problems of the future.

As a result of this new way of thinking, the Foundation’s endowed assets have grown to over \$4,000,000. The philosophy has changed to looking at problems from a long-term perspective and strategic solutions rather than short-term, shallow fixes. “The power of endowment” is now part of the reason why the Foundation is important to the community.

Our own internal endowments ensure the permanence of the Foundation itself, but we also steward various types of endowments that allow donors to target causes that are important to them and use the Foundation tools and services to support their individual interests and charitable passions forever.

For many years there has been a growing realization by the Foundation board of directors that a major responsibility of our organization is to promote and inspire philanthropy. The Foundation is proud that Grundy County has always been generous to not-for-profits and those in need, but that's not necessarily being philanthropic. The goal of the Foundation is two-fold: (1) provide the technical and mechanical education and structure to help individuals fulfill their charitable goals for the causes they are passionate about – this is giving THROUGH the Foundation, not TO it. And (2) educate and inspire donors, non-profits, and professional advisors about the reasons for philanthropic giving. The Foundation organizes quarterly meetings of an “Intentional Giving” team to help achieve these two goals. Public forums designed to help spread the word of philanthropy include the annual fall Philanthropy Conference and the “Faith-Based Giving” workshop series that the Foundation hosted for area churches over the winter of 2010-2011 and taught by the Lake Institute for Faith & Giving at Indiana University for these initiatives. The Foundation is proud to repeat the words of the Lake Institute when they say that they know of no other community in the nation who has tried to collectively impact philanthropy like the Foundation has in Grundy County.

Financial Stewardship

The Foundation's financial stewardship and management has become much more sophisticated as a result of education from Communityworks and the Council on Foundations. In the early years the Foundation tried using two different organizations to invest the Foundation's assets and provide fund accounting. Neither organization was a good fit for the need for fund accounting and investment satisfaction. The Foundation also concluded that conflicts of interest with local banks and investment managers precluded the use local institutions or organizations, plus none of them offered the sophisticated fund accounting necessary for community foundations. In the summer of 2009, the Foundation solicited “Requests for Proposal” from around the Midwest investment management circles. After vetting the proposals, investment managers Savant Capital Management and Balasa, Dinverno, & Foltz were chosen. A new Investment Policy Statement was adopted which includes an expanded set of asset mix choices for donor funds that are globally-diverse and consist of equity and fixed-income blends using ETFs and indexed investments.

The Foundation currently has almost 50 separate funds set up by donors among family donor-advised, scholarship, field of interest, designated, and agency/non-profit funds, all of which can be designed as permanently endowed or non-endowed. The complex bookkeeping necessary to track the activity of these many funds prompted the Foundation to purchase “Fund Tracker Pro,” software specifically designed for fund management, especially the percentages of income each fund earns each quarter. A part-time Accounting Manager has been in charge of the Foundation's financial stewardship since November 2008.

Program Focus

Unlike other non-profit organizations, the Community Foundation of Grundy County does not provide direct service such as feeding the hungry or disaster relief, but instead identify community issues and attempt to mitigate them by convening groups with similar interests and missions, making grants to non-profits, and running programs in-house that other non-profits are not ready to take on. Examples of our convening, grantmaking, and internal programs include:

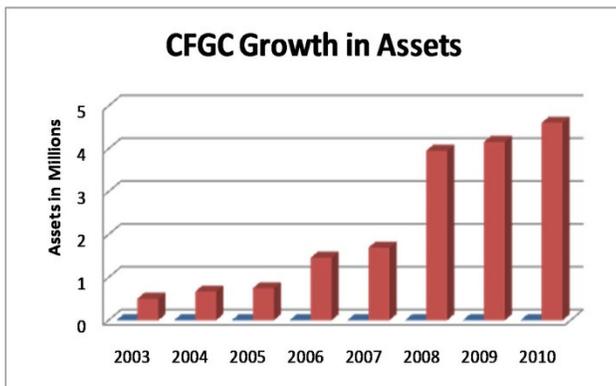
- **Convening** – The first Childcare Summit was held in 2003 which led to a multi-year grant to Jump Start, a parents-as-teachers model that was offered in Will County but not in Grundy County due to lack of state funding. Dozens of at-risk families with young children are served through the program annually and it has now been adopted as a program of Easter Seals. Over the last four years the Foundation has granted nearly \$200,000 for this early childhood program.
- **Grantmaking** – The majority of our grants through our grant application process are for less than \$2,000 each but make an impact because we have a fast turn-around for approval and are for items that would otherwise take not-for-profit months of fundraising to achieve. Grants have funded the replacement of phones and computers due to lightning strikes, new & improved software, staff training & conferences, and seed money to try new programs such as the YMCA summer camp.
- **Internal Programs** – While networking with fellow non-profits, the Foundation often envisions an idea to improve the quality of life in Grundy County, but no not-for-profits or government organizations are poised to take it on, so the Foundation launches and manages them:
 - 941-HELP is an information and referral system that lists Grundy-specific health and human services to make it easier for residents to find help in their time of need, especially during evening and weekend hours when agencies are usually closed. 941-HELP is available 24/7 via phone, website, computer kiosks, and card racks in over 50 locations around Grundy County.
 - The Foundation’s workforce development research plus the 2009 countywide needs assessment both ranked transportation as a top priority for Grundy County. Grundy’s residents who are low income, disabled, seniors, and temporarily without cars need to get to work, shopping, appointments, school, and training. With technical assistance from the Illinois Rural Transit Assistance Center, staff has been convening the Grundy Transit Stakeholders to develop a coordinated transit system that will bring additional transit dollars to Grundy County and increase the availability of transportation (more vehicles and more hours).
 - Foundation staff convenes the Grundy Partnership for Children who in 2010 developed the first-ever Back-to-School Fair for our county’s low income families with school-age children. This partnership of Operation St. Nick, We Care, Morris Hospital, the Grundy County Health Department, the Morris Lions Club, United Way, and the Foundation was successful in serving over 500 children in one day in one location for their immunizations, dental

screenings, vision screenings, school physicals, school supplies, clothing, and shoes.

After convening so many partners and developing programs that impact residents from across the county, the Foundation realized that name “Morris Community Foundation” was too narrow so the name was updated to “Community Foundation of Grundy County” and revealed at the 2008 Donor and Partner Appreciation Night.

Growth of Funds and Assets

The Foundation’s ability to impact Grundy County is the result of incredible support of donors. In the first year, a single letter went to the community and over \$50,000 was raised to begin the Foundation’s projects. At the end of the first year the assets were about \$50,000 and grew to \$500,000 over the next couple of years. Then the Foundation partnered with Communityworks in 2003, started building endowment and recruiting donor funds, and assets have really grown since as evidenced in the graph below:



The growth of assets has been directly associated with the growth of funds which have been established at the Foundation by donors to meet needs in the community. Donor Advised Funds are used by individuals and families to support the causes they care about; Designated Funds support a specific charity named by the donor; Field of Interest Funds support broad topics such as historic preservation, the arts, education, or people in need; Agency Funds are endowments set up by organizations to provide steady income in the future; and Scholarship Funds support education and training for students of all ages and fields of study. Funds can be endowed or non-endowed depending on the goals of the donor who establishes the Fund. A list of current funds below shows the breadth of interests that donors are impacting with their Funds:

Baum Endowed Fund	MCHS Siron Endowment
Baum Non-Endowed Fund	MCHS Gordon Endowment
Baum Scholarship Fund	MCHS McTague Endowment
Borgstrom Endowed Fund	MCHS Ciota Endowment
Borgstrom Family Fund	MCHS Funk Endowment
Bowker/Ostrem Library Fund	Minooka HS/Allison Rivera Endowment
CFGC Legacy Fund	Morris Family YMCA Fund
Community Beautification Fund	Muffler Scholarship Fund
Community Facilities Fund	Presbyterian Music Fund
Communityworks Endowment	Rezin Endowed Fund
Dr. John & Judie Roth Fund	Rezin Family Fund
Duane H. Schroeder Fund	Rezin Orthopedic Fund
Eslinger Endowed Fund	Roth Hospital Endowed Fund
Evenson YMCA Fund	Running for Life NFP Fund
Golimowski Scouting Fund	Sereno Endowed Fund
Grundy Bank Music Fund	Sereno Fund
Holderman Hospital Fund	Tesdal Family Fund
Hynds ICS Endowed	We Care Endowed Fund
Hynds Morris Hospital Fund	Wohlwend Endowed Fund
IMPACT Dwight Fund	Wohlwend Fund
Jack & Karen Hynds Fund	Wolter Family Fund
MCHS Anderson Endowment	

Again, it is the intent of the Community Foundation of Grundy County to tackle issues that others are not willing or able to address for various reasons. In today's climate of ever-decreasing state and federal dollars for local units of government and area not-for-profits, the need to "take care of our own" is stronger than ever and will most likely continue through our lifetimes. The Foundation will continue to use our strengths to identify issues and partners, pool resources, build endowment, and streamline services to take care of our own in Grundy County – now and forever.

Current & Past Board Members

Kristi	Bennington	Edward Jones	Board of Directors, President
Tom	Tesdal	First Midwest Bank	Board of Directors, Vice President
Ralph	Wolter	Chemical Engineer, retired	Board of Directors, Secretary/Treasurer
Jim	Baum	Retired Retailer	Board of Directors
Chris	Harty	Mazon State Bank	Board of Directors
Russelle	Holsinger	Holsinger & Meents	Board of Directors
Terry	Marketti	Grundy County Sheriff	Board of Directors
Ann Marie	Struck	Dentist	Board of Directors
Dick	Walker	Hogan Walker	Board of Directors
Al	Yancey	Minooka Fire Chief	Board of Directors
Ron	Evenson	Evenson Explosives, retired	Past Board Member
Andy	Hunt	Farmer	Past Board Member
Mark	Jorstad	Farmer	Past Board Member
Carol	Narvick	Narvick Bros.	Past Board Member
Bill	Norton	Standard Bank, retired	Past Board Member
Jim	Peterson	Bimet, retired manufacturer	Past Board Member
Sue	Rezin	State Senator	Past Board Member
Chuck	Richardson	Pastor, First Christian Church	Past Board Member
Joe	Schmitz	Standard Bank, retired	Past Board Member
Dick	Schweickert	Chamlin & Associates Engineers	Past Board Member
Julianne	Buck		Executive Director
Devan	Gagliardo		Program Director
Judy	Hauch		Accounting Manager



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