

The ripple effects of strategic giving

For the past 10 years, the Community Foundation of Grundy County has focused our giving on the community, specifically on early childhood care and education, workforce development, and land use and protection.

Today, when the foundation takes what we have learned in our decade of existence and look forward, we want to encourage community members to give to the organizations they find important. And, we want to remind people they can be giving even if they are not millionaires.

"The point is, you don't have to be wealthy," Julie Buck, executive director, said. "There are opportunities for people with very modest means to be strategic in their giving."

Inspired in part by the book "Inspired Philanthropy," by Tracy Gary, we plan to use the next phase of our existence to focus on our donors.

"We're trying to reach the impassioned people, not the wealthy people," Buck said.

The community foundation helps donors in three ways. We help them to identify ways of giving that will create a legacy, help them investigate non-profits to see where their money is going to be used, and, where appropriate, we assist them in creating a whole new way to give.

"One of the things that a community foundation can do is force the not-for profits to be more transparent in their operations," Jack Hynds, chairman of the philanthropy committee, said.

He uses an example in his own life to illustrate this. Hynds said he and his wife, who spend part of the year in Colorado, heard the presentation of a non-profit and were interested in what the organization was doing. They wanted to give a moderate amount of money, but before doing so, wanted to make sure they understood exactly what the organization did with donations.

Hynds said he sent the organization a letter asking for copies of its financial statements and other governance items, and was curious when it took the organization many weeks to compile that information and reply to his letter.

"It makes me wonder about the strength of an organization when they are not able to respond to donor inquiries in a timely manner," he said.

Part of the problem is that non-profits often do not have time to make those one-on-one responses, and that very fact might turn off the donors they need.

By using a community foundation, that transparency is achieved much more easily. Additionally, we are familiar with all the non-profits in a given community. With hundreds in Grundy County alone, that is a priceless service to someone who knows he wants to give, but has not identified to whom he wants to donate his money.



Getting things done

The Community Foundation of Grundy County was founded in 1999. Almost immediately, we began to identify needs in the community.

"For the first 10 years, most projects were civic-oriented," Hynds said.

Among those are the renovation of the Rock Island Train Depot and the renovation of what is now CanalPort Park.

"The foundation was a driving force behind putting those projects together," Buck said. "The foundation tries to be a force when it sees an issue that needs attention in the community.

"For example, we've hosted public forums on storm-water management, public school funding, and environmental health."

Looking toward the future, we hope to motivate people and introduce the idea of Inspired Philanthropy to 100 people. Additionally, we plan to be the facilitator to help non-profits more effectively reach their donors, with workshops planned for area churches and contests to encourage youth to be philanthropic.

For more information on the Community Foundation of Grundy County, call (815) 941-0852 or visit <http://www.cfgrundycounty.com/>

Climbing Mountains

"Climbing mountains" is often used as a metaphor for things that are difficult or hard to obtain, as well as for experiences that are uplifting and exhilarating.

When asked why he climbed a mountain, Sir Edmund Hilary replied, "Because it's there." He viewed mountains as a challenge: a physical challenge, an organizational challenge, and a challenge to view the world from another perspective.

For centuries, others have viewed mountains and asked "why bother to climb them?" Why interfere? Nothing can be done about them... or with them. It's classic passivity.

The latter is not the mindset of the Community Foundation of Grundy County. All of us see things around us that need to be changed, need to be improved, and need to be challenged. It is the mission of the Foundation to improve our county-wide community. The problems and possibilities often look like mountains – but climbing them is what we do. We look at issues with a fresh set of eyes, bring multiple organizations together, and find solutions. Our motto is "bridging people who care with causes that matter."

Finally, it is an American tradition that we don't wait for someone else to do it. We respect the freedom and the ability of individuals (and association of individuals) to make a difference. We take pride in not waiting for the government or someone else to solve our local problems. Rather, we find the solution ourselves.

Let the Community Foundation of Grundy County help you make a difference in our community by using our donor services to support the causes that you are passionate about. Donors give THROUGH community foundations, not TO us to design solutions to problems and support the organizations you believe are doing important work in Grundy County.



Jim Baum,
President

Statement of Activities

Revenue	2008	2009
Contributions and donations	\$1,068,504	\$188,022
Grand Victoria Foundation grant	\$2,050,000	\$40,000
Interest and dividends on investments	\$5,782	\$106,987
Other investment income	\$8,416	\$54,932
Net loss on land sale	-\$2,296	\$0
<u>Net gain/loss on investments</u>	<u>-\$493,215</u>	<u>\$235,064</u>
Total Revenue	\$2,637,191	\$625,005
Expenses		
Grants and programs	\$317,939	\$355,819
Administrative salaries, occupancy, & misc office expense	\$58,269	\$64,210
<u>Fundraising</u>	<u>\$600</u>	<u>\$1,000</u>
Total Grants and Expenses	\$376,808	\$421,029
Net Revenue	\$2,260,383	\$203,976
Fund Balances		
Balances at beginning of year	\$1,693,300	\$3,953,683
<u>Net revenue</u>	<u>\$2,260,383</u>	<u>\$203,976</u>
Balances at end of year	\$3,953,683	\$4,157,659

Statement of Financial Position

Assets		
Cash	\$18,751	\$101,923
Investments at market value	\$1,484,916	\$3,145,626
Savings and short-term cash investments	\$2,456,014	\$900,000
Land, buildings, and equipment (basis less accumulated depreciation)	\$4,378	\$10,110
Total assets	\$3,964,059	\$4,157,659
Liabilities		
<u>Other liabilities</u>	<u>\$10,376</u>	<u>\$0</u>
Total liabilities	\$10,376	\$0
Total fund balances	\$3,953,683	\$4,157,659

Grants Sub-Total by Fund Type

Designated Funds	\$500
Donor Advised Funds	\$146,700
CFGC Unrestricted Fund	\$6,314
<u>Communityworks Endowment</u>	<u>\$37,352</u>
Total 2009 Grants	\$190,866

Grant Recipients

American Red Cross
 Grundy County Chapter
 Big Brothers Big Sisters
 Boy Scout Troop #469
 Boy Scout Troop #471
 Canal Corridor Association
 Christian Youth Center of Morris
 Community Nutrition Network
 Doctors Without Borders
 First Presbyterian Church of Morris
 Georgetown University
 Gift of Hope Organ & Tissue
 Donor Network
 Grundy Community Volunteer Hospice
 Grundy County Historical Society
 Illinois Valley Industries
 Immaculate Conception Parish
 Immaculate Conception School
 Jim Feeney Memorial Scholarship
 Fund at ICS
 Joliet Area Community Hospice
 Joliet Junior College Foundation
 Jump Start Education Service
 Network
 Leukemia & Lymphoma Society
 Make-a-Wish Foundation
 MCHS Family & Consumer Sciences
 Department
 Morris Hospital
 Morris Hospital Foundation
 Morris Hospital Transportation
 Program
 Morris Theatre Guild
 Operation St. Nick
 Palm Beach Pops
 Southern Illinois University
 Foundation
 St. Jude Children's Research Hospital
 Susan G. Komen for the Cure
 Three Rivers Habitat for Humanity
 Under His Wings
 Veterans Assistance Commission
 We Care of Grundy County
 Will County Children's Advocacy
 Center
 Williams Syndrome Association
 Youth Service Bureau of Illinois Valley

10 Reasons People Choose to Give Through Community Foundations

- We are a local organization with deep roots in the community.
- Our professional staff has broad expertise regarding community issues and needs.
- We provide highly personalized service tailored to each individual's charitable and financial interest.
- Our funds help people invest in the causes they care about most.
- We accept a wide variety of assets, and can facilitate even the most complex forms of giving.
- We partner with professional advisors to create highly effective approaches to charitable giving.
- We offer maximum tax advantage for most gifts under federal law.
- We multiply the impact of gift dollars by pooling them with other gifts and grants.
- We build endowment funds that benefit the community forever and help create personal legacies.
- We are a community leader, convening agencies and coordinating resources to create positive change.

CFG Board of Directors

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Morris, Illinois 60450
815-941-0852
julie@cfgrundycounty.com

Stewardship

The key to success for the Community Foundation of Grundy County is your level of confidence in the trustworthiness of the stewards. To assure funds will be used in accordance with donor wishes, without excessive administrative expense, and with discretion to meet changing needs in the future, the Foundation bylaws provide that "It is the intent that the selection of Directors shall ensure that this institution remains in the hands of Grundy County's most capable and involved civic leaders. All Directors should have demonstrated commitment to the community through donations of time and/or money to civic affairs."

Strategic Philanthropy

The charitable impulse is at the heart of the human experience. While today's social problems seem bigger and more complex than ever, the opportunity to influence our world has never been greater. But changing the world for the better requires thoughtful approaches, research, and a consciousness about what we want to accomplish and how.

By "strategic philanthropy" we mean effective giving which is designed around focused research, creative planning, proven strategies, careful execution, and thorough follow-up in order to achieve the intended results. To be truly effective and rewarding, strategic philanthropy must also reflect and be driven by your core values and concerns. It should empower the family to change the world by energizing your passions – whether through a program to nurture early childhood literacy or an innovative career education program for at-risk youth.

Giving in good times and bad

Many donors in Grundy County this past Christmas season were worried about making donations to help their favorite charities because they are not sure about what the economy has in store.

A Donor Advised Fund is a good solution for up and down years. Donors can contribute cash and other assets, receive an immediate tax deduction, then take their time granting out of the Fund at their own pace, sometimes over years. In good times, donors build up their Fund – in lean years they use the accumulated value of the Fund to distribute as grants.

Donor Advised Funds can be endowed or pass-through. Please contact the Community Foundation of Grundy County to learn more about Donor Advised Funds and the benefits they offer now and for years to come.

Choices

Communities are all about choices. A new coffee shop and a book store, rejuvenated blocks of downtown, rising high school test scores, a new county park with baseball diamonds and a skating rink are all the results of choices. Good things don't just happen to a community. They are the results of choices... community choices.

As a community foundation, we help our residents and leaders identify and make choices about the future that make sense. We help to determine the kind of community we want to live in and then participate in building it.

Based on our activities in Grundy County, the Community Foundation of Grundy County has identified five main action areas:

Early childhood care & education;
Workforce development;
Land use & protection;
People in need; and
Growth and its impact on our systems.

But our focus is not simply on these five action areas. We are painting a much bigger picture. We are building communities in Grundy County where people want to live and where families can buy the homes they like at prices they can afford. Our communities are places where entrepreneurs start new businesses and established companies relocate. We envision communities where people prosper, nature thrives, and our children enjoy lives filled with unlimited possibilities.



Julie Buck,
Executive
Director

2009 Donor List

Mr. & Mrs. John Adler
 Mr. & Mrs. Jim Basil
 Mr. Robert Bates
 Mr. & Mrs. Jim Baum
 Mr. & Mrs. Gerald Bednarik
 Mr. & Mrs. David Bellamy
 Mrs. Ginny Bellamy
 Mr. & Mrs. David Bennington
 Mr. & Mrs. Ariel Bjelland
 Mr. & Mrs. Donald Black
 Mr. John Boma & Susan Dahlin
 Mr. & Mrs. Jerry Borens
 Ms. Lois Bounds
 Mr. & Mrs. Robert Breisch
 Mr. & Mrs. Scott Breslar

How wonderful it is that
 nobody need wait a single
 moment before starting to
 improve the world.

— Anne Frank

Mr. & Mrs. Scott Breuning
 Mr. & Mrs. Arthur Bridges
 Mr. & Mrs. Ken Buck
 Mr. & Mrs. Guy Christensen
 Mrs. Joan Christensen
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 Mr. & Mrs. Bob Cleek
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 Mr. & Mrs. Scott Wilkinson
 Mr. & Mrs. Ralph Wolter
 Mr. & Mrs. Jim Wright
 Ms. Marilyn Yuhus
 Mr. & Mrs. Robert Zerboglio
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 Ayers Electric
 Balasa, Dinverno, & Foltz LLC
 Baum Community Charitable Trust
 Benson Insurance Agency, Inc.
 Chamlin Associates
 Christopher B. Burke Engineering
 Cleek Plumbing, Heating
 Costco Wholesale
 D Construction
 Dollars and Sense
 Donico, Inc.
 EPIC Group
 Erienna Nettle Creek Multi Twp
 Erienna Township
 Feeney's Package Liquor, Inc.
 First Community Bank
 First Midwest Bank
 Fruland Funeral Home
 Grundy Bank
 Harvard Savings Bank
 Hogan Walker
 Jay M. Heap & Associates, Ltd.
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 Midwest Auto
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 Morris Health Mart
 Morris Liquors
 Northern Insurance Group
 Phil Dinelli State Farm
 Robinson Engineering, Ltd.
 Service Gas Inc.
 Spaceco, Inc.
 Steve's Flooring & Design
 Steve's Tire & Auto Service
 Terri Gilmoure Insurance Agency
 Teska Associates
 West Wind Farms

If you would like to make a contribution to the Community Foundation of Grundy County, please include this form with your donation to:



102 Liberty Street
 Morris, Illinois 60450

Name _____

Address _____

Phone _____ Email _____

Enclosed is my tax-deductible gift of \$ _____

Also, my gift is in memory/honor of _____

(Make checks payable to Community Foundation of Grundy County.)

Please apply my gift to:

<input type="checkbox"/> Early Childhood Care & Education	<input type="checkbox"/> People In Need
<input type="checkbox"/> Workforce Development	<input type="checkbox"/> Growth and Its Impact on our Systems
<input type="checkbox"/> Land Use & Protection	<input type="checkbox"/> CFGC Operations