2014
# annual report
*to the community*

COMMUNITY FOUNDATION of Grundy County
15th Anniversary 1999-2014

## Launching two new programs

The Community Foundation of Grundy County launched two new initiatives in 2014: "Non-Profit Tools for Success" and a Senior Network.

"Tools for Success" (TfS) is a monthly after-hours for not-for-profits to network and hear a presentation on a topic relevant to the administration of a quality not-for-profit. All not-for-profits serving Grundy County are invited to attend, whether a social service agency, church, government office, youth sports, fine arts, etc.

The concept and implementation of TfS is fairly simple – gather colleagues, feed them, ask those colleagues for topics they want to learn about, and ask an expert from the area to come present.

We kicked it off in June with Christina Chapman Van Yperen of the Morris Daily Herald who gave us some very direct tips for how to submit press releases that get noticed and published – tips that are very different from the way it has been done in years past. Two quick tips: 1) Always email your story so that staff can simply cut and paste (no one re-types from fax anymore) and 2) The cameras on cell phones are not quality enough to print larger in the paper, so always use a real camera – then email the photo. Needless to say, her presentation got rave reviews!!

July was a holiday month. August was a presentation by Jay Fillman of the Foundation board about non-profit financials. September was Lea Ann Skogsberg presenting tips for writing grant proposals. Caroline Portlock presented non-profit HR (human resources) tips in October. David Terrill presented planned giving basics in November. December focused on board governance with Katheryn Wiedman. January was postponed due to weather, but Eric Peterson returned in February to lead a conversation about free and low-cost software and technology.

Why host and coordinate this program? The Community Foundation of Grundy County improves the quality of life in Grundy County through leadership and philanthropy. Not-for-profit agencies and organizations are a large part of our community, therefore improving their capacity to be the best they can be improves the quality of life in our county.

Our second initiative to launch in 2014 is the Senior Network, which is a meeting of the minds of the agencies and organizations who serve our county's retirees.

We kicked it off with a big event in October with guest speakers Lucia Jones of the Northeastern Illinois Agency on Aging and also Professor Lisa Hollis-Sawyer in the gerontology program at Northeastern Illinois University. Both women did an outstanding job of talking about the services and amenities that are available (and should be available) in a community to make that community appealing and functional for senior citizens.

Since then, we have convened the group of service providers on a bi-monthly basis under the leadership of Devan Gagliardo, the Foundation's Program Director.

As the network has assessed the services, needs, and gaps in Grundy County, two needs rise to the top: 1) The desire for more recreation and social interaction for seniors and 2) communications.

There is an acknowledgement that sometimes it isn't a lack of recreation and activities for seniors - it is sometimes lack of transportation or the time of the recreation and therefore transportation can be a problem. For example, many seniors have difficulty driving after dark. This is an even more frustrating problem in winter as it gets dark so early. Even those drivers who are willing to carpool and pick up friends get nervous about being responsible for the safety of a carload of friends.

So what is being done to solve this issue? So far we can report that we are working with the City of Morris to expand the services of the city PUP van. How can we use our grantmaking to expand transportation for seniors? Stay tuned for details!

The second issue to come out of the Network is communications – What's happening and how do seniors find out?

This is our appeal to service providers: If you provide ANY service or entertainment that seniors can attend, PLEASE use the media outlets available to you. This includes the Morris Daily Herald, the Coal City Courant, The Paper in Dwight, the Herald LIFE in Minooka and Channahon, WCJS-WJDK, the Grundy Chamber of Commerce, and the Grundy County Interagency Council. You can also include the villages, churches, libraries, and schools in your distribution list. Please send your information 5-6 weeks in advance and use the "Tools for Success" tips on the Foundation's website. AND be sure to update your website, Facebook, and Twitter regularly – at least weekly!

Our appeal to Grundy County's seniors: Pay attention to what's out there – there's a lot! Communication is a two-way street and you have to seek out information. Read the papers, listen to the radio, and look at websites and Facebook. Getting on the internet may be intimidating for some, but we beg you to try, and there are great resources to help you. The libraries and the Grundy County Housing Authority have all hosted events in the past to help seniors get online. Does your family often wonder what to buy you for gifts? Tablets and internet subscriptions make great gifts!!

We are proud to have launched both "Tools for Success" and the Senior Network. Both are moving along well and doing great work. If you have questions about either program, please do not hesitate to contact us at 941-0852 or julie@cfgrundycounty.com. Our website is http://cfgrundycounty.com and you can "like" us on Facebook and follow us on Twitter!

# President's Commitment

## REFLECTING ON 2014 WITH THE COMMUNITY FOUNDATION

As I reflect on the numerous successes and opportunities the Community Foundation of Grundy County has had in 2014, I have to start with the fundraising following the devastating tornado in Diamond and Coal City in November 2013. Our Foundation, along with Operation St. Nick, We Care and United Way raised a total of $415 thousand, all of which was paid out to the affected residents and businesses within the tornado damaged area. It was an amazing act of generosity from Grundy County and around the nation. The Community Foundation and Operation St. Nick have since started a permanent Disaster Fund, so we are even better prepared to help our residents whenever disaster strikes.

On a calmer note, the Community Foundation has started a new program this year for the other not-for-profits in the county - Tools For Success. This is a monthly 5pm meeting where a subject of interest has a speaker present the topic, whether it involves finances, board governance, or organization transparency. This has been very well received, and will continue in 2015.

The Community Foundation has grown from assets of $50,000 to $6,000,000 in the past ten years. Since 2003 we have granted out over $1,000,000. Through the power of our endowments, we have made life simpler when we can count on the 4% withdrawal from the endowment every year.

This past year we have negotiated and recently purchased the old We Care condo at the Canal Port Community Center. We did this without spending Foundation money, thanks to the generous donations from the Board of Trustees. We will be remodeling the property this Spring, and hope to be moving in by early Summer.

And lastly, the Community Foundation of Grundy County was recently named the 2014 Organization of the Year by the Grundy County Chamber of Commerce. We are deeply honored by this recognition.

Ralph Wolter, President
Board of Trustees

# Statement of Activities

| | 2013 | 2014 |
|---|---|---|
| **Revenue** | | |
| Contributions and donations | $272,674 | $457,392* |
| Grand Victoria Foundation grant | $0 | $0 |
| Interest and dividends on investments | $160,166 | $97,490 |
| Fee income from donor funds | $67,037 | $82,788 |
| Miscellaneous income | $12,528 | $12,176 |
| Net gain/loss on investments | $480,463 | $89,810 |
| **Total Revenue** | **$992,868** | **$739,656** |
| **Expenses** | | |
| Grants and programs | $428,327 | $575,052 |
| Administrative salaries, occupancy, & misc office expense | $86,283 | $107,129 |
| Fundraising | $0 | $0 |
| **Total Grants and Expenses** | **$514,610** | **$682,181** |
| **Net Revenue** | **$478,258** | **$57,475** |
| Fund Balances | | |
| Balances at beginning of year | $5,633,044 | $6,111,272 |
| Net revenue | $478,258 | $57,475 |
| **Balances at end of year** | **$6,111,302** | **$6,168,747** |

# Statement of Financial Position

| | | |
|---|---|---|
| **Assets** | | |
| Cash | $142,113 | $203,908 |
| Investments at market value | $5,967,887 | $5,964,568 |
| Savings and short-term cash investments | $0 | $0 |
| Land, buildings, and equipment (basis less accumulated depreciation) | $1,302 | $271 |
| **Total assets** | **$6,111,302** | **$6,168,747** |
| **Liabilities** | | |
| Other liabilities | $0 | $0 |
| Total liabilities | $0 | $0 |
| **Total fund balances** | **$6,111,302** | **$6,168,747** |

# Grants Sub-Total by Fund Type**

| | |
|---|---|
| Agency Funds | $5,196 |
| Designated Funds | $41,360 |
| Donor Advised Funds | $83,885 |
| Field of Interest Funds | $2,625 |
| Scholarship Funds | $1,000 |
| CFGC Unrestricted Funds | $27,292 |
| **Total 2013 Grants** | **$161,358** |

**2014 was an unusual year due to receiving and distributing over $415,000 in tornado donations.*
***Not including mini grants to disaster families and businesses.*

# 2014 Grant Recipients

American Cancer Society
American Greyhound Great Lakes Inc.
Angels of Hope
Augustana College
Big Brothers Big Sisters of Will & Grundy Counties
Boy Scout Troop #469 Morris
Boy Scout Troop #471 Morris
Bradley University
Catholic Ministries Annual Appeal
Childs' Play Inc.
Christian Youth Center of Morris
Coal City High School
Coal City Public Library
Community Foundation of Grundy County
Community Nutrition Network
Doctors Without Borders
Eastern Kentucky University
EWTN
First Presbyterian Church Morris
First Presbyterian Church Morris Foundation
Georgetown University
Grand Ridge Cemetery
Greater Joliet Area YMCA
Grundy Area Vocational Center (GAVC)
Grundy Community Volunteer Hospice
Grundy County Health Department
Grundy County Historical Society
Grundy-Three Rivers Habitat for Humanity
Hall High School
Illinois Valley Industries
Illinois Wesleyan University
Immaculate Conception Parish
Immaculate Conception School
JJC Foundation
LaSalle Peru High School
Lewis University
Marquette Academy
Minooka Community High School
Morris Area Community Band
Morris Area Public Library
Morris Community High School
Morris Downtown Development Partnership
Morris Family YMCA
Morris Hospital
Morris Hospital Foundation
Morris Rotary Club Back Pack Program
Morris Theatre Guild
MVK Middle School
Newark High School
Norfolk Rescue Mission
Northwestern University Law School
Operation St. Nick
Ottawa High School
Premier Academy
Putnam County High School
Seneca High School
Serena High School
Special Connections of Grundy County
St. Bede Academy
St. Jude Children's Research Hospital
The 100 Club of Grundy County
Two Rivers Head Start Morris
United Cerebral Palsy
United Way of Grundy County
United Way of Illinois Valley
University of Illinois Urbana-Champaign
University of North Florida
University of Notre Dame
Univsersity of Iowa
We Care of Grundy County
Wilmington High School
Wounded Warrior Project
Yarn Foundation
Yorkville High School

## 2014 Trustees

Ralph Wolter,
President

Tom Tesdal,
Vice President

Jay Fillman,
Secretary/Treasurer

Jim Baum
Kristi Bennington
Lorraine Davidson
David Ferguson
Chris Harty
Dr. Ann Marie Struck
Shantel Leasure
Dick Walker

Julie Buck,
Executive Director

Devan Gagliardo,
Program Director

Judy Hauch,
Accounting Manager

## *Thank You, Trustees!*

*In fall 2014, three trustees retired from the Community Foundation board – Tom Tesdal, Dick Walker, and Shantel Leasure. We thank them for their service and dedication!*

# "Best Kept Secret"

See page 2's "Grants Sub-Total by Fund Type"?? It is exciting to see that only $27,000 of grants last year were made based on decisions of our grants committee. The remaining $134,000 in grants was decided by the donors and families who established the funds. Similarly with our list of 2014 grant recipients - the vast majority were selected by the donor fund holders, not us.

We believe the Community Foundation is one of the best-kept secrets - but we are trying to change that!

Can you give to your favorite charities without going through the Community Foundation? Absolutely. But there are times when it is beneficial to use our services: 1) Maybe you've had a high income year. You can off-set your tax burden by starting a fund with a large amount and then granting it out in smaller increments over time, taking the tax deduction at the front; 2) You want to leave a legacy. You can trust the Foundation to adhere to your wishes after your lifetime. You can even allow your children and grandchildren to make grants decisions!

MVK students hold new band instruments purchased with grants from Foundation funds.

# Funds Managed

**Agency Endowments**
CFGC Legacy Fund
Morris Cemetery Association
Running for Life NFP Fund
Saratoga School Endowment
We Care Endowed Fund

**Donor Designated Funds**
Bowker/Ostrem/Meadors Library Fund
Duane H. Schroeder Fund
Evenson YMCA Fund
Golimowski Scouting Fund
Holderman/Meadors Hospital Fund
Hynds ICS Endowed
Minooka HS Endowment in Memory of Allison Rivera
Morris Family YMCA Fund
Morris YMCA Non-Endowed Fund
Presbyterian Music Fund

**Donor Advised Funds**
Baum Endowed Fund
Baum Non-Endowed Fund
Baum Scholarship Fund
Borgstrom Endowed Fund
Borgstrom Family Fund
Dr. John & Judie Roth Fund
Eslinger Endowed Fund
Hynds Community Health Fund
Jack & Karen Hynds Fund
Ken & Joan Sereno Endowment
Minooka Education Fund*
Rezin Endowed Fund
Rezin Family Fund
Rezin Orthopedic Fund
Ron & Jackie Wohlwend Fund
Roth Endowment for Community Health Fund
Sereno Fund
Tesdal Family Fund
The Twilight Fund
Wohlwend Endowed Fund
Wolter Family Fund

**Field of Interest Funds**
Community Beautification Fund
Communityworks Endowment
Grundy Bank Music Fund
IMPACT Dwight Fund
IMPACT Dwight K-9 Fund

**Scholarship Funds**
MCHS Espi Siron Endowment
MCHS Eugene L. Funk Endowment
MCHS Fred W. Anderson Endowment
MCHS Mark McTague Endowment
MCHS Robert & Melissa Ciota Endowment
MCHS Roger Gordon Endowment
Muffler Scholarship Fund

**new fund in 2013*

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

COMMUNITY FOUNDATION of Grundy County
15th Anniversary 1999-2014

102 Liberty Street
Morris, Illinois 60450

Name _____

Address _____

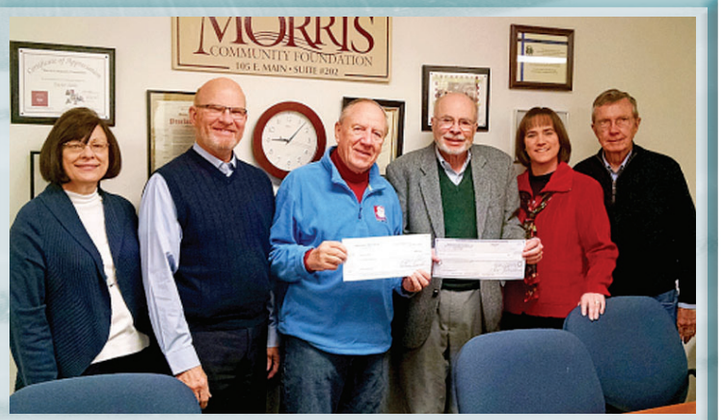
Phone _____ Email _____

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:

- ☐ Early Childhood Care and Education
- ☐ Workforce Development
- ☐ Land Use and Protection
- ☐ People In Need
- ☐ Growth and Its Impact on our Systems
- ☐ CFGC Operations




Joe Schmitz of Operation St. Nick joins Jim Baum and the trustees of the Community Foundation to present checks to the Grundy County Disaster Fund.

# 2014 Donor List

Mr. & Mrs. Lawrence Allen
Mr. & Mrs. Bruce Baker
Mrs. Jean Basil
Mr. Robert Bates
Mr. & Mrs. Rodney Baudino
Mrs. Virginia Bellamy
Mr. & Mrs. David Bennington
Mrs. Mary Lou Bennington
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Mr. & Mrs. Donald Kaufman
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Mr. & Mrs. Gerald Kiernan
Mr. Steven Kieslar
Mr. Christopher Kindelspire
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Mr. & Mrs. Gerald Knudson
Mr. & Mrs. Dick Kopczick
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Mr. & Mrs. Dennis Resz
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Mrs. Delores Robinson & Mr. Patrick Stevens
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Mr. Bill Willet
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Mr. & Mrs. Ralph Wolter
Mr. & Mrs. Jim Wright
Allison Family Farm
Babe's Tap & Grill
Bailey Printing
Brian Zabel & Associates
Chanticleer Productions
Echo Lanes
Edelman USA
Edward Jones - Kristi Bennington
Elburn Co-Op
Erienna Nettle Creek Multip Twp Assessment District
Erienna Township Road and Bridge Fund
Fillman Insurance
Fruland Funeral Home
Grundy County Corn Festival
Hoffman Transportation
J&M Auto Body
Jerri's Hair Co.
Maria's Pizza
Matteson Hardware
MKM Oil
Morris Building & Loan
Morris Community High School
Peterson Computer Consulting
Terri Gilmoure Insurance Agency
The Power of Touch

# Want to learn more?

*Please visit our website to see more examples of how we are improving the quality of life in Grundy County through Leadership & Philanthropy!*

**http://cfgrundycounty.com**