

2013 annual report

to the community



"Responsive and pro-active"

In an unusual weather year, Grundy County saw both flooding and tornadoes in 2013.

The Nettle Creek through Morris flooded in April, causing substantial damage to homes, Morris Hospital, Elliott Manor, and Shady Oaks mobile home park had to be evacuated, and the historic aqueduct where the Nettle Creek meets the I&M Canal collapsed.

In November, an EF-2 tornado damaged over 250 homes and businesses in Diamond and Coal City. The same tornado also caused major damage in Gifford and Washington, Illinois.

With both incidents, local not-for-profits of all shapes and sizes sprang into action to provide shelter, food, clothing, water, and other basic necessities. Also, for the first time, a series of mini grants were provided to disaster victims through a partnership of the Community Foundation, We Care, Operation St. Nick, and United Way.

Our first effort was right after the flooding when water in basements ruined water heaters and furnaces. Our goal was to help those families quickly replace those items so that they could get back into their homes and not be displaced. It also helped to have a central location for donations and a process for distributing those donations to disaster families in need.

When the tornado struck, it was easier for the four organizations to repeat the process of accepting donations from the community, pool them with our own resources, and distribute mini grants to families affected. The check amounts weren't large, but we believe they were emotionally and financially helpful for those families. We believe it is very important for Grundy County residents to know that their county cares about them.

As a result, a formal Disaster Relief Fund has been established at the Community Foundation of Grundy



County so that funds are held in reserve for a future disaster, and so that there is an agreed-upon location for receiving donations from the community and a procedure for distributing them.

Another example of our responsive work is our grant-making. Each year we budget an amount to grant to area not-for-profits to fund their work in Grundy County. Grant applications are received throughout the year until the budgeted monies are spent. Applications are reviewed monthly by our Grants & Programs Committee and grants are usually awarded for capital purchases or new programming.

On the other side, the Community Foundation is also proactive and strategic about how our resources are used in Grundy County to improve the quality of life. We convene (and co-convene) networks of stakeholders in order to address issues in Grundy County. Examples of this include the Grundy Partnership for Children, the Grundy County Area Planners, the Behavioral Health Alliance, and the Business Education Council.

Sometimes we have an idea for a project but don't find a ready partner, so we implement the project ourselves. Our best example of this is 941-HELP, a Grundy-specific information and referral system that is available 24/7 via website, kiosks, phone, and card racks.

We also contract with not-for-profits on strategic projects that we don't have the staff or expertise to implement. For example, for a few years we convened a handful of not-for-profits who serve our residents in need. Their need could be lack of job, lack of education, low income, mental health, substance abuse, dysfunctional families, etc.

We knew by convening these not-for-profits that there is a collective desire to "wrap" services around clients, but that each organization was maxed out on capacity. Therefore we budgeted funding and gave a grant to the Grundy County Health Department's Division of Mental Health and Substance Abuse to expand their capacity and staff this wrap around case management project called "Resource Connections."

This staff person meets one-on-one with clients referred from the team of not-for-profits, working intensely with the client to move him/her along the path to self-sufficiency. Yes, this is labor- and emotionally-intensive, but the baby steps taken by these clients so far have been life-altering and we are so pleased with the results so far. It isn't a fast process, but it is very impactful for the individuals who are being served.

We are proud of the flexibility of the Community Foundation. We have the grants budget to respond to not-for-profit needs as they occur. We also have the ability to seek out partners and fund them to implement a strategic project. To our friends who send donations to us, "thank you" as it's your donation that makes all of this possible!!

President's Commitment

Can it really be 15 years ago that the Morris Community Foundation was first formed? Wow, time passes fast when we are having fun!

Over the years, the Community Foundation realized that it was supporting people and programs not just in Morris, but throughout Grundy County. Thus we changed our name and became the Community Foundation of Grundy County. And we changed our logo and tagline, too - "Bridging people who care with causes that matter".

Throughout the years, the Foundation has been blessed with competent and dedicated members of the Board of Trustees. We have 12 Trustees right now, but we have had 15 previous Trustees who have been extremely dedicated to the causes that matter. Those 15 retired Trustees have been replaced with one new Trustee on average every year for the last 15 years. This low turnover rate on our board has helped us remain the community leader that we are - there's so much institutional knowledge among these Trustees that it really helps us strategize from year to year.

When Grundy County experienced the flooding and tornadoes last year, our current Board of Trustees discussed how we could help those in serious need. Then this group of like-minded individuals decided that yes, we were willing to join in helping, with our efforts and with the Community Foundation's resources. After serious discussion by all, it was an easy decision to create a permanent Disaster fund. But are we truly prepared for Grundy County's next disaster? It is a goal that I am committed to and I hope you will join us!



Ralph Wolter
President

Statement of Activities

	2012	2013
Revenue		
Contributions and donations	\$412,711	\$272,674
Grand Victoria Foundation grant	\$0	\$0
Interest and dividends on investments	\$194,524	\$160,166
Fee income from donor funds	\$50,197	\$67,037
Miscellaneous income	\$9,173	\$12,528
<u>Net gain/loss on investments</u>	<u>\$434,953</u>	<u>\$480,463</u>
Total Revenue	\$1,101,558	\$992,868
Expenses		
Grants and programs	\$276,643	\$428,327
Administrative salaries, occupancy, & misc office expense	\$100,018	\$86,283
<u>Fundraising</u>	<u>\$0</u>	<u>\$0</u>
Total Grants and Expenses	\$376,661	\$514,610
Net Revenue	\$724,897	\$478,258
Fund Balances		
Balances at beginning of year	\$4,908,147	\$5,633,044
<u>Net revenue</u>	<u>\$724,897</u>	<u>\$478,258</u>
Balances at end of year	\$5,633,044	\$6,111,302

Statement of Financial Position

Assets		
Cash	\$103,274	\$142,113
Investments at market value	\$5,526,161	\$5,967,887
Savings and short-term cash investments	\$0	\$0
Land, buildings, and equipment (basis less accumulated depreciation)	\$4,029	\$1,302
Total assets	\$5,633,464	\$6,111,302
Liabilities		
<u>Other liabilities</u>	<u>\$0</u>	<u>\$0</u>
Total liabilities	\$0	\$0
Total fund balances	\$5,633,464	\$6,111,302

Grants Sub-Total by Fund Type

Agency Funds	\$4,000.00
Designated Funds	\$90,335.00
Donor Advised Funds	\$35,388.00
Field of Interest Funds	\$1,620.00
Scholarship Funds	\$1,500.00
CFGC Unrestricted Funds	\$30,157.00
Total 2013 Grants	\$163,000.00

2013 Grant Recipients

American Cancer Society Relay for Life	Mazon/Verona/Kinsman ESD 2C
American Greyhound Great Lakes Inc.	Minooka CCSD 201
American Red Cross- Illinois Valley Chapter	Minooka CHSD 111
Animal Welfare League	Morris Area Public Library
ATI Foundation	Morris CHSD 101
Aurora University	Morris Fire Protection District
Boy Scout Troop #469 Morris	Morris Hospital
Boy Scout Troop #471 Morris	Morris Hospital Foundation
Braceville School District 75	Morris HS Band Program
Breckenridge Music Festival	Morris Mobile Meals
Canal Corridor Association	Morris Musical Arts Guild
Child Care Resource & Referral	Morris Rotary Club
Christian Youth Center of Morris	Morris SD 54
Coal City CUSD #1	Morris Theatre Guild
Cops 4 Cancer, Inc.	Nettle Creek CCSD 24C
Doctors Without Borders	Nettle Creek School PTO
Easter Seals of LaSalle & Bureau Counties	Newark High School
First Presbyterian Church Morris	North Central College
First Presbyterian Church Morris Foundation	Northern Illinois CISM Team
Gardner CCSD 72C	Operation Care Package
Georgetown University	Operation St. Nick
Good Shepherd Manor	Ottawa High School
Grand Ridge Cemetery	Ottawa Police Department
Greater Joliet Area YMCA	Peru Police Department
Grundy Community Volunteer Hospice	Premier Academy
Grundy County Historical Society	Project Success of Eastern Bureau County
Grundy Development Corporation	Purdue University
Guardian Angel Community Services	Putnam County CUSD 535
Hall High School	Running for Life
Illinois State University	Salvation Army USA
Illinois Valley Industries	Saratoga CCSD 60C
Illinois Valley PADS	Seneca High School
Immaculate Conception Parish	Serena High School
Immaculate Conception School	South Willmington CCSD 74
JJC Foundation	Spoon River College
Joliet Junior College	Spring Arbor University
Junior Achievement of the Heartland	St. Jude Children's Research Hospital
LaSalle County CASA	Starved Rock Foundation
LaSalle Peru High School	Stephens College
Loyola University of Chicago	Streator Family YMCA
	Three Rivers Habitat for Humanity
	United Cerebral Palsy
	United Way of Grundy County
	United Way of Illinois Valley
	University of Indianapolis
	University of Notre Dame
	University of Oklahoma
	Village of Mazon
	We Care of GC
	Wounded Warrior Project
	Yorkville CUSD #115

2013 Trustees

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New Fund Highlight: Minooka Education Fund

A new fund established at the Community Foundation in 2013 is the Minooka Education Fund. This fund was set up by a donor who wants to support the education of Minooka High School students but wants to remain anonymous.

Anonymity is an excellent reason to use the Community Foundation to accomplish your charitable goals!

One part of our services is to allow donors to design funds that fit them, their personality, and their charitable goals. Funds can have anonymous names, be named after a loved one, or can have your family name so that your legacy lives on after your lifetime.

Another feature of the Minooka Education Fund is that it distributes the money directly to the school and allows the school to incorporate it into their spring scholarship selection process. Some donors like to be directly involved in how their fund is used – others like to trust others to make those decisions. Again, it's all about donor design.

How can we be of service to you and your charitable goals? Are you interested in a donor advised fund, designated fund, field of interest fund, or scholarship fund? You can also set up an endowment for your favorite charity so that it has operating income forever, long after your lifetime.

Conversations about donor designed funds are confidential so we encourage you to contact our staff or trustees. We can help you think through your charitable goals and offer our services when the fit is right!

*"The purpose of life is not to be happy. It is to be useful, to be honorable, to be compassionate, to have it make some difference that you have lived and lived well."
~ Ralph Waldo Emerson*

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
Serenio 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:



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 and 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 and Protection | <input type="checkbox"/> CFGC Operations |

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>

2013 Donor List

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