

2015

annual report

to the community



Pete Hoaglund Memorial Golf Fund

Peter "Pete" Hoaglund began loving golf when his family moved from Minnesota to Wisconsin as a teenager, and he began working at Richland Center Golf Course and playing golf in all of his spare time. That was the beginning of a lifetime of golf.

Pete became a very good golfer. His high school didn't have a team, nor did he have the opportunities that are available today to receive a college scholarship. But he was good to the level that he was able to play some of the top courses in the world - including St. Andrews in Scotland, the birthplace of modern golf.

His love of golf was passed along to his family - Sue (his wife of 48 golfing years), daughter Kristi, sons Matt and Todd, and he was their teacher. He was so happy to see his granddaughters Hailey and Kailyn begin golf under John Keegan's teaching. "We planned our vacations and even our Edward Jones company trips around golf. If there were great courses nearby, or one he hadn't played, those were the trips we went on," explained Sue.

When Pete passed away in April 2015, his family chose to honor his favorite sport by creating the "Pete Hoaglund Memorial Golf Fund" at the Community Foundation of Grundy County. This endowed fund will live forever and the annual income will be distributed to the golf team at Morris Community High School to support their needs, whether it be shirts, green fees, equipment, or travel.

"I would love to see more support for the golf team at MCHS," explained daughter Kristi Bennington. "And it goes beyond financial support. My niece and one other girl play on the boys' team because there aren't enough girls at



the high school to support a full girls team. Coach Matt Lafond then enters them with other girls to play conference, regional, and state separate from the boys. We'd love to see more kids play golf so that the high school team can have a full roster every year."

"Our goal of the Pete Hoaglund Memorial Golf Fund is to show the community that golf is a great sport, now and forever. My dad is proof that you can play golf your entire life, share it with your family, and travel the world playing it. It's a sport that teaches goals, values, respect, discipline, and it's one you can truly play your whole life."

The Hoaglund Fund was begun by the family, but anyone can contribute to it.

"Yes, we have the Chip'in-In (booster) Club to support the MCHS golf team, which is parent-run," said Bennington. "They have one golf outing fundraiser, which is May 16th this year and determines their funds for the year. You can call Todd Hoaglund if you'd like to play or sponsor. By setting up this endowment, we know that there will always be funding for the golf team regardless of any unforeseen circumstances."

If you would like to contribute to the Pete Hoaglund Memorial Golf Fund, please send your gift (check or stock) to the Community Foundation of Grundy County and note the Fund name in the memo line.

If you would like to explore a donor-designed fund to honor a loved one or to forever support your favorite charity, please call us at 941-0852 or download a "New Fund Questions" form on our website: <http://cfgrundycounty.com>. This questionnaire will help you formulate your ideas into a fund that meets your philanthropic goals.

It doesn't take much to be a philanthropist. Even a small fund (with "small" being a subjective term) makes a lasting impression and shows your favorite charity or cause that you believe in their good work!

President's Commitment

GRUNDY COUNTY IS GETTING HEALTHIER!

I recently read a Morris Herald-News article headline that stated that Will and Grundy Counties are two of the healthiest counties in Illinois. That headline grabbed my attention!

First, I wondered where Grundy had been, since the first paragraph stated that Grundy County had improved. Second, I wondered where we as senior citizens are with regard to health, as I happen to be in this group. And third, I wondered what the Community Foundation of Grundy County might do to help, since the Foundation's mission statement is to provide vision for Grundy County to preserve and enhance our quality of life. Good health is definitely part of our quality of life.

On the improvement front, the article stated that Grundy County had improved from 40th in the state in 2015 to 19th. Improvement is always good, but....

The article did not specifically mention senior citizens or their health issues. However, since Marcia and I had both taken a trip to the Morris Hospital emergency department in the last month, there is room for investigation.

The Community Foundation has done a number of things the past few years to improve senior citizens' quality of life. Throughout 2015 we convened the Senior Network, whose main conversation has been about recreation for seniors.

Our next senior-related event will occur at the Foundation's annual Donor & Partner Appreciation Night on May 2nd. Our speaker, Dr. Lisa Hollis-Sawyer, will be speaking on senior women's health.



Ralph Wolter, President Board of Trustees

Statement of Activities

	2014	2015
Revenue		
Contributions and donations	\$457,392	\$502,493*
Grand Victoria Foundation grant	\$0	\$0
Interest and dividends on investments	\$97,490	\$128,435
Fee income from donor funds	\$82,788	\$86,809
Miscellaneous income	\$12,176	\$11,330
<u>Net gain/loss on investments</u>	<u>\$89,810</u>	<u>\$(297,256)</u>
Total Revenue	\$739,656	\$431,811
Expenses		
Grants and programs	\$575,052	\$570,522
Administrative salaries, occupancy, & misc office expense	\$107,129	\$112,878
<u>Fundraising</u>	<u>\$0</u>	<u>\$4,755</u>
Total Grants and Expenses	\$682,181	\$688,155
Net Revenue	\$57,475	\$(256,344)
Fund Balances		
Balances at beginning of year	\$6,111,272	\$6,168,747
<u>Net revenue</u>	<u>\$57,475</u>	<u>\$(256,344)</u>
Balances at end of year	\$6,168,747	\$5,912,403

Statement of Financial Position

Assets		
Cash	\$203,908	\$223,673
Investments at market value	\$5,964,568	\$5,454,419
Savings and short-term cash investments	\$0	\$0
Land, buildings, and equipment (basis less accumulated depreciation)	\$271	\$234,311
Total assets	\$6,168,747	\$5,912,403
Liabilities		
<u>Other liabilities</u>	<u>\$0</u>	<u>\$0</u>
Total liabilities	\$0	\$0
Total fund balances	\$6,168,747	\$5,912,403

Grants Sub-Total by Fund Type**

Agency Funds	\$0
Designated Funds	\$48,600
Donor Advised Funds	\$95,415
Field of Interest Funds	\$0
Scholarship Funds	\$1,000
CFG Unrestricted Funds	<u>\$35,400</u>
Total 2015 Grants	\$180,415

Disaster Fund

June 2015 Coal City Tornado	
Cash donations from 761 donors	\$342,746.96
Grants & expenses to date	<u>-\$241,416.97</u>
Balance	\$101,329.99

*2015 was an unusual year due to donations and grants for the June 2015 Coal City tornado.
**Not including tornado grants.

2015 Grant Recipients

Angels of Hope	Just Animals
Boy Scout Troop #469	LaSalle-Peru High School
Boy Scout Troop #471	Little Brothers Friends of the Elderly
Catholic Charities - Diocese of Joliet	Living Alternatives
Christian Youth Center of Morris	Marquette Academy
Church of Christ at Dartmouth College	Minooka High School
Citizen's Police Academy Alumni Association	Morris Area Public Library
CNN Meals on Wheels	Morris Community High School
Coal City High School District #1	Morris Family YMCA
Coal City Public Library	Morris Hospital
Community Nutrition Network	Morris Hospital Foundation
Cystic Fibrosis Foundation	Morris Theatre Guild
Doctors Without Borders	Newark High School
Exhibit Fine Arts Center	North Park University
First Presbyterian Church Morris	Operation St. Nick
First Presbyterian Church Morris Foundation	Ottawa High School
Gardner Grade School	Our Savior's Lutheran Church
Grand Ridge Cemetery	Peace Lutheran Church
Grundy Area Vocational Center	Pet Project, Inc.
Grundy Community Volunteer Hospice	Premier Academy
Grundy County Health Department	Putnam County High School
Grundy County Historical Society	Seneca High School
Grundy County State's Attorney's Office	Small Town Theatrics
Grundy-Three Rivers Habitat for Humanity	St. Baldrick's Foundation
Hall High School	St. Bede Academy
Illinois Valley Industries	Trinity Services
Immaculate Conception School	United Way of Grundy County
Joliet Area Community Hospice	Village of Channahon Police Department
Joliet Junior College	We Care of Grundy County
	Williamson County Historical Society
	Wilmington Coalition for a Health Community
	Wilmington High School
	Yorkville High School
	Youth Services Bureau of Illinois Valley

“Death, Taxes, and Breakfast”

by Robert Benjamin Johnston
Vice President, Community Foundation of Grundy County

The coffee was warm, the food simple but good, and as always the company exceptional. The group had been having breakfast this way for years. Sometimes there would be more of them, sometimes less; the size of the group at any one day depended on both family and business obligations. Sometimes they got along, sometimes they didn't. But all shared similar values regarding their families and their communities.

“I'm not sure what to do with that property I picked up 25 years ago. I got it dirt cheap. No one wanted it back then. No one saw what I saw with it,” as cup of strong coffee was sipped.

“So what's the problem? We'd all like that kind of problem,” was the retort.

“The problem is I don't really feel like paying a boat load of taxes if I sell it. My kids are pretty successful. And when I die, I still pay a ton of taxes on it,” taking another sip of coffee and unintentionally sharply stabbing at the eggs. Each stab was unintentionally coordinated every time the word “taxes” was said.

“You're going to be dead. Who cares? Besides, we all know that you're too much of a pain in the backside to die. God would find you annoying. The Devil would be concerned you'd take him for all he's worth,” speaking with the kind of grin associated with good natured needling. “You're destined to wander the earth as a ghost making the rest of us miserable, figuring out more ways to make money.”

In addition to the fork stabbing harder at the eggs, this time the knife was used to cut into the eggs. As the eggs were scrambled,

it wasn't really necessary. “You know, there's a reason your spouse encourages you to get out of the house more often. Anyway, you know how I feel about death and taxes. One I can't avoid, the other, well, let's just say, if it's legal, and there's a way, I'm all for paying as little as possible.”

While the two continued to entertain the rest of the group, a third chimed in. Though thoroughly enjoying the exchange, and not averse to stirring things up by throwing a little gas on the fire, this time the person decided to pass along a little bit of information, even though it may put an end to the group's entertainment.

“I got three words for you. And they aren't ‘You're a yutz,’” proving that Yiddish has an appropriate word for every occasion. “Try these three words, ‘charitable remainder trust.’ It allows you to give something to that one charity that still tolerates you, give something back to this community which despite your Grinch-like nature I know you still care about, and most importantly, get an income for the rest of your life and pay less taxes.”

The fork stopped stabbing at the eggs. The knife was put down. A sip was taken from the cup of coffee. “Tell me more about this ‘charitable remainder trust.’”

A charitable remainder trust is a great way to use assets to provide annual payments to yourself or loved ones with the remaining amount going to a fund at the Community Foundation of Grundy County to support the causes you care about...forever!

Want to learn more? Visit cfgrundycounty.com or call the Community Foundation of Grundy County at 815-941-0852.

Funds Managed

Agency Endowments

CFGC Legacy Fund
Morris Cemetery Association
Morris HS Foundation
Endowment
Running for Life NFP Fund
Saratoga School Endowment
We Care Endowed Fund

Donor Designated Funds

Bowker/Ostrem/Meadors
Library Fund
Duane H. Schroeder Fund
Golimowski Scouting Fund
Holderman/Meadors Hospital
Fund
Hynds ICS Endowed
MCHS Ciota Endowment
MCHS Espi Siron Endowment
MCHS Eugene L. Funk
Endowment
MCHS Fred W. Anderson
Endowment
MCHS Mark McTague
Endowment
MCHS Roger Gordon
Endowment
Minooka HS Endowment
in Memory of Allison Rivera
Morris Family YMCA Fund
Morris YMCA Non-Endowed
Fund
Peter Hoaglund Memorial
Golf 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
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
Lois Lundy Fund for Mental
Health

Scholarship Funds

Muffler Scholarship Fund

**new fund in 2015*

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

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.)



520 W. Illinois Ave.
Morris, Illinois 60450



1,500 eighth grade students from across Grundy County attended the first “Hands-On 8th Grade Career Fair” in May 2015.

2015 Donor List

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Ayers Electric
Balasa Dinverno Foltz
Benson Insurance Agency
Chamlin & Associates
City of Morris
D Construction
Erienna Twp.
Feeney's Liquors
First Midwest Bank
Fruland Funeral Home
Grundy Bank
Home Instead Senior Care
Illiana Big R Stores
Jewel-Osco
Lyondell-Basell
Maria's Ristorante & Pizzeria
Morris Community High School
Morris Dermatology
Park Pointe Senior Living
Renaissance Simons Charitable
Seco Systems Enterprise Corp.
State Farm Insurance
Systems Enterprise Corporation
Terri Gilmoure Insurance

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