

2018

# annual report

*to the community*



## Endowments kick-off era of youth services

2018 was a year focused on youth, which is now a permanent part of our work due to the recent Abel and Sanford Endowments. The right mix of funding, ideas, and partners came together to define a structure for identifying issues and partners and then using the Endowments to provide the funding.

In early 2018 we were introduced to “ACEs (Adverse Childhood Experiences)” and how services, programs, and organizations who serve children and families are instrumental in helping children overcome the effects of ACEs to lead productive adult lives. We were excited to learn about ACEs because it now gives us a framework for collaboration and grantmaking. We can ask potential grant recipients: Do you have (or Can you develop?) programming to help children and youth overcome ACEs? It’s amazing to see how many are doing just that – we just never thought of it in that context before!

In October we hosted a ACEs training for schools and nonprofits and awarded grants from the Abel Endowment. Saratoga School, the YMCA, and the Grundy County Health Department received funds to train staff how to better interact with children and families who have experienced ACEs. Minooka Primary School used Abel funding to host an event to promote family togetherness. The collaboration of Easterseals Jumpstart, We Care, and Crossroads Counseling used Abel funding to host two 5-week classes for parents involved with trauma – whether themselves, their children, or both.

The Sanford Youth and Enrichment teams began meeting, strategizing, and grantmaking in 2018. Mary Ann Sanford’s estate established two endowments for youth. One is for “enrichment” for 3rd through 5th graders and that team awarded grants to area schools for robotic and coding activities, Mystery Science, Feed My Starving Children, 360 Degree Video, and to University of Illinois Extension for team building activities.

The other “youth” fund can address a wide variety of topics including mental and physical health, relationships, substance abuse, and other struggles facing today’s teens. The team has dedicated 2018-19 to mental health. We have contracted with a PhD intern who has adopted Grundy

County as her project. She will meet with the broad array of behavioral health providers who serve Grundy, produce an “asset map” of who is providing services, to whom, when, where, and at what price. She will then assist the team in developing a 3-5 year plan of action for how to use the Sanford funds.

For National Philanthropy Month in November, we hosted an event where Learning to Give worked with nonprofits and teachers to increase their knowledge and awareness for how they can incorporate giving, charity, and philanthropy in their lessons and activities.

Regardless of whether our county’s youth are struggling, learning, creating, or wanting to make a difference, these recent endowments are allowing us the flexibility to design grants and programs to address them all!



Coal City “Young Philanthropists” present a grant check to Help for Hope.



# President's Commitment

The more I serve on the Foundation Board and get to know what we do and have the potential to do, I'm amazed at how little it takes to make a difference.

Sure, we've gotten some big endowments into the Foundation lately that come with big dreams of the donors, but I've also watched some of our little funds have big impact.

Truly anyone can be a philanthropist. And I think what sets us apart is our mission of endowment. If you give a check every year to your church and a handful of charities, you can set up a modest endowment at the Foundation that will forever send checks to those charities long after your lifetime and in your name. That's a great legacy.

A new fund has been set up by donors to forever fund the Chief Shabbona Pow Wow firefighter training held each spring. Another new fund will help pay for maintenance on the two pieces of antique fire equipment owned by the City of Morris and the Morris Fire Protection and Ambulance District. Both of these funds were set up by people who care about the future... and that's their legacy.

We've also become very good at solving problems. The Peg Davis Trust was told by the IRS that they had to distribute 5% a year in grants...but a farm only produces 2-3%. By converting the Trust to an Endowment at the Foundation, the Committee for Peg's estate can grant out their half of the farm's earnings, whatever that percent is, without selling land to meet the 5% IRS requirement.

Regardless of your reason, please come see Julie, Devan, and Judy at the Foundation to brainstorm your ideas. I bet we have a service and solution that helps you use modest means to leave a legacy.



Jay Fillman, President  
CFGC Board of Trustees

## Statement of Activities

	2017	2018
<b>Revenue</b>		
Contributions and donations	\$1,058,708	\$1,767,314
Grand Victoria Foundation grant	\$0	\$0
Interest and dividends on investments	\$138,388	\$168,083
Fee income from donor funds	\$106,522	\$108,765
Miscellaneous income	\$7,025	\$2,740
<u>Net gain/loss on investments</u>	<u>\$714,576</u>	<u>-\$762,397</u>
<b>Total Revenue</b>	<b>\$2,025,219</b>	<b>\$1,284,505</b>
<b>Expenses</b>		
Grants and programs	\$589,382	\$486,474
Administrative salaries, occupancy, & misc office expense	\$115,764	\$144,930
<u>Fundraising</u>	<u>\$4,517</u>	<u>\$4,395</u>
<b>Total Grants and Expenses</b>	<b>\$709,663</b>	<b>\$635,799</b>
<b>Net Revenue</b>	<b>\$1,315,556</b>	<b>\$648,706</b>
<b>Fund Balances</b>		
Balances at beginning of year	\$6,783,072	\$8,098,628
<u>Net revenue</u>	<u>\$1,315,556</u>	<u>\$648,706</u>
<b>Balances at end of year</b>	<b>\$8,098,628</b>	<b>\$8,747,334</b>

## Statement of Financial Position

<b>Assets</b>		
Cash	\$106,961	\$141,236
Investments at market value	\$7,776,856	\$8,398,537
Due Frpm Condo Association		\$2,500
Savings and short-term cash investments	\$0	\$0
Land, buildings, and equipment <u>(basis less accumulated depreciation)</u>	<u>\$214,811</u>	<u>\$205,061</u>
<b>Total assets</b>	<b>\$8,098,628</b>	<b>\$8,747,334</b>
<b>Liabilities</b>		
<u>Other liabilities</u>	<u>\$0</u>	<u>\$0</u>
Total liabilities	\$0	\$0
<b>Total fund balances</b>	<b>\$8,098,628</b>	<b>\$8,747,334</b>

## Grants Sub-Total by Fund Type

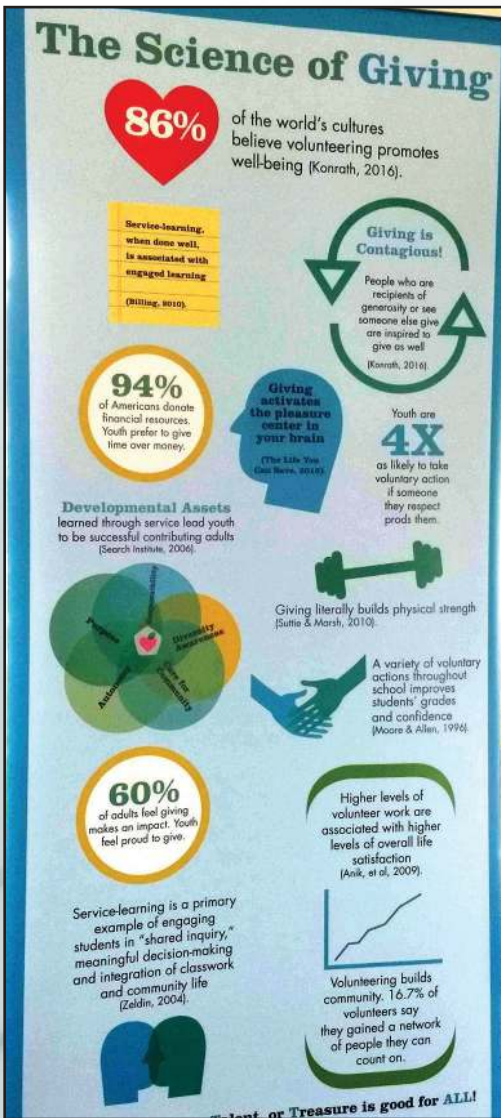
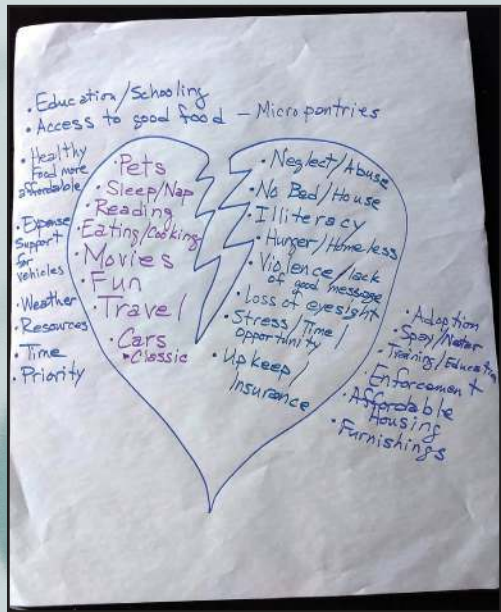
Agency Endowments	\$11,164	\$140,188
Designated Funds	\$46,848	\$21,837
Donor Advised Funds	\$328,313	\$144,950
Field of Interest Funds	\$18,400	\$23,650
Scholarship Funds	\$1,000	\$1,230
CFGC Unrestricted Funds	<u>\$38,068</u>	<u>\$32,777</u>
<b>Total Grants</b>	<b>\$443,793</b>	<b>\$384,632</b>

## 2018 Grant Recipients

Angels of Hope  
Catholic Charities c/o Our Lady of the Gulf  
Christian Youth Center of Morris  
Coal City Fire Department  
Community Foundation of Grundy County  
Community Nutrition Network  
Crisis Center for South Suburbia  
Doctors Without Borders  
Eastern Illinois University  
Easterseals Jumpstart  
Equine Dreams  
Exhibit Fine Arts Gallery  
First Presbyterian Church Foundation  
Fox Center Families and Friends  
Good Counsel Mary's Shelter Gulf Coast  
Goose Lake Prairie Partners  
Grand Ridge Cemetery  
Greater Joliet Area YMCA  
Grundy Area PADS  
Grundy Community Hospice  
Grundy County Drug/Mental Health Court  
Grundy County Health Department  
Grundy County Historical Society  
Grundy-Three Rivers Habitat for Humanity  
Guardian Angel Community Services  
Help for Hope  
Homeschoolers Helping Homeschoolers  
Illinois Valley Community College  
Illinois Valley Industries  
Immaculate Conception Parish  
Immaculate Conception School  
Joliet Junior College  
Just Animals  
Little Sisters of the Poor  
MCHS Chipp'in-In Club  
MCHS Prom Fest  
Minooka Community High School  
Morris Area Public Library  
Morris Cemetery Association  
Morris Community High School  
Morris Community High School Foundation  
Morris Community YMCA  
Morris Hospital Foundation  
Morris Rotary Club  
Morris Theatre Guild  
Northern Illinois Food Bank  
Olivet Nazarene University  
Operation St. Nick  
Our Lady of the Gulf  
Our Patriots  
Ronald McDonald House Charities  
Sisters of Mercy  
Special Connections of Grundy County  
St. Ignatius  
St. Jude Children's Research Hospital  
T.E.A.C.H. Outdoors  
United Way of Grundy County  
University of Evansville Baseball  
Village of Coal City  
We Care of Grundy County



# “Learning to Give” worked with nonprofits and teachers during National Philanthropy Day in November.



Left and above: Betsy Peterson of Learning to Give; The Science of Giving; “Mapping Your Heartbreak” exercise.  
Below: Teams of nonprofits brainstorm on tabletop exercises.

## Funds Managed

\* = endowed

\*\*= new in 2018

### Agency Funds

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

### Designated Funds

Bowker/Ostrem/Meadors Library Endowment for Life-Long Learning\*  
Collins and Sprague Fire Science Educational Endowment\*  
Duane H. Schroeder Fund\*  
Golimowski Scouting Endowment\*  
Holderman/Meadors Hospital Endowment for Women’s Health\*  
Hynds ICS Endowment\*  
Mark Smith Legacy Fund for Scholarships (Minooka HS)  
MCHS Ciota Fund  
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 Community YMCA Endowment\*  
Morris Firefighters Assn Antique Maintenance Fund\*\*  
Morris YMCA Non-Endowed Fund

Peter Hoaglund Memorial Golf Endowment\*  
Presbyterian Music Fund\*  
Sanford St. Thomas Episcopal Church Endowment\* \*\*

### 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 Non-Endowed Fund for ICS  
Francis & Joanne Kasten Fund in Memory of Peg Davis\*\*  
Hynds Community Health Fund\*  
Hynds Non-Endowed ICS Fund  
Jack & Karen Hynds Fund  
Ken & Joan Sereno Endowment\*  
Minooka Education Fund  
Rezin Endowed Fund\*  
Rezin Family Fund  
Roger Eslinger Endowed Fund\*  
Ron & Jackie Wohlwend Fund  
Roth Endowment for Community Health\*  
Roth Non-Endowed ICS Fund  
Sereno Fund  
Tesdal Family Fund  
The Twilight Fund  
Wohlwend Endowed Fund\*  
Wolter Family Fund\*

### Field of Interest Funds

Community Beautification Fund  
Communityworks Endowment\*  
Disaster Fund  
Gerald D. Abel Family Endowment\*  
Grundy Bank Music Fund  
IMPACT Dwight Fund  
IMPACT Dwight K-9 Fund  
JMD Fund for Needy Families  
Lois Lundy Fund for Mental Health  
Minooka Lions Club Community Fund  
Sanford Enrichment Endowment\* \*\*  
Sanford Teen/Youth Endowment\* \*\*  
Women’s Giving Circle

### Scholarship Funds

John Martin Steele VFW #6049  
Scholarship Fund\* \*\*  
Muffler Scholarship Endowment\*

*Thank you to Kristine Bennington for her years of service on our Board of Trustees! Before her retirement in October 2018, Kristi served as a Trustee, Vice President, and President of the Board. Thanks, Kristi!!*



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<http://cfgrundycounty.com>