

The  
Community Foundation  
OF MACON COUNTY

Serving Donors. Leading Change.

2013 Annual Report

# WELCOME MESSAGE



Dear Friends,

One of the great joys I experience as President of The Community Foundation of Macon County is spending time with people who want to make our community great. Our donors, our Board, volunteers, and staff are passionate people whose talents and treasures combine to energize progress in Decatur and Macon County.

Our job at The Foundation is to create a place where donors' needs are met and their charitable interests supported. Each and every donor is unique. And their approach to philanthropy is unique. We are committed to knowing our donors, learning what they care about, and understanding the impact they want to make.

Just as important, we must understand our community and where improvement is most needed. Through The Foundation's convening work, donors and volunteers come together to tackle complex problems such as improving educational outcomes, making our community more attractive, and addressing crucial social issues. The collective impact of these forces creates exponential progress that cannot be achieved by working alone.

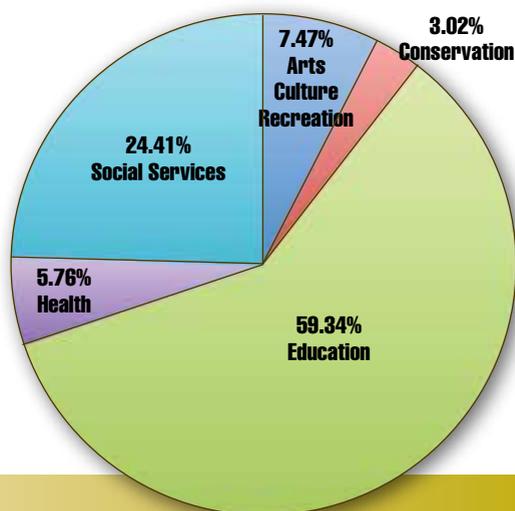
We invite you to be part of this synergy. You are the "community" in our name. As you review this annual report and consider what The Foundation achieved in 2013, consider what role you played and what role you will play in the future.

Thank you for supporting our work, and the leadership we provide to make the future brighter for everyone in Macon County.

Wegi Stewart  
President

## 2013 GRANTS BY CATEGORY

Community agencies serving these broad categories benefit from grants through The Community Foundation.





## LEADING CHANGE COLLABORATION AND COMMITMENT IMPACT KEY COMMUNITY ISSUES

As an agent for positive change in Decatur and Macon County, The Community Foundation of Macon County is dedicated to taking action in response to issues identified by community residents and leaders.

And as a vehicle for local philanthropy, The Community Foundation also links philanthropists to these issues. The wide range of funds held by The Community Foundation enables donors to contribute to causes they hold dear, and those which affect our community's future wellbeing: Arts/culture, community development, education, health, social services, and youth.

Action directed to these issues starts with input. In July through September 2013, The Community Foundation, in partnership with Champaign-based Research Survey Services, conducted a series of focus group interviews in order to identify key problems and issues in Macon County. A cross-section of residents participated in telephone interviews, and comprehensive personal interviews were conducted with many community leaders.

Consensus was clear: Education and employment ranked as top areas of concern.

The same issues were prioritized in 2005, when The Community Foundation first responded with formation of the Education Coalition (EdCo) of Macon County — a collaborative initiative with the mission of mobilizing the community to improve Macon County through education. A group of Decatur educators and business and community leaders united to formulate an organized response to the issues behind low student performance in public schools, and The Community Foundation bolstered their efforts by partnering with the Grand Victoria Foundation.

Since its inception, EdCo's momentum and impact have strengthened considerably. In 2013, the EdCo "family" topped 100 stakeholders — professionals united in their passion for the importance of education "from cradle to career." These individuals also maximize their experience and expertise by working in seven collaboratives: Early Childhood Parent Mentoring; Kindergarten Readiness; Grade Level Readiness; Out Of School Providers; Improved ACT Scores; Adult Basic Education; and Career Readiness.

EdCo's collective impact — defined as the commitment of a group of professionals from different sectors to a common agenda for solving a complex social problem — distinguishes it as a StriveTogether member, one of only three organizations in Illinois to achieve this ambitious distinction. StriveTogether membership totals 48 nationwide, with EdCo as one of 39 organizations ranked at the "emerging" level.

"Education is a lifelong journey, and each stage of a person's success is predicated on what they learned prior to their current level," says Dani Craft, Director, EdCo Operations and Community Engagement. "The Strive Network recognizes learning as a life cycle. Strive creates a detailed framework and rigorous benchmarks from which organizations can guide themselves and course-correct as needed.

"Strive provides objective direction while respecting the uniqueness of each organization within the network."

Throughout 2013, efforts focused particularly on the importance of kindergarten readiness, and a campaign was developed to distribute materials to area families and caregivers. Elements of this campaign include Kindergarten Readiness Activity books, Family Fun activities designed to teach kindergarten readiness, and the broadcast of monthly kindergarten readiness segments in partnership with WAND-TV.

"Everyone is on board, and now recognizes how important pre-school is in terms of kindergarten readiness," says EdCo member and Decatur Daycare Director Janice Baldwin. "Our primary goal now is to get our information to parents in the community whose children don't go to daycare or pre-school."

Data provided by EdCo also enables local outreach and after-school programs to address areas of specific need. "Our outreach preschool program provides training for at-home caregivers," says EdCo member and YMCA Executive Director Paul Stanzone. "EdCo also helps form collaborative partnerships, such as 4H STEM (Science, Technology, Engineering & Math) activities for students in our after-school program. This replicates a successful element without having to duplicate it.

"I view EdCo as the collaborating agency that supports the school districts, while providing a conduit to the agencies that can offer support."

Employment couples with education as a top community concern, and has long framed the EdCo mission.

"The importance of building teams; identifying gaps in educational learning and delivery and filling those gaps; and learning about the skills necessary for gainful employment in Macon County has been at the heart of the work since the Coalition was first established," says Richland Community College President and EdCo inaugural steering committee member Dr. Gayle Saunders.

"We appreciate our EdCo partners, and realize that it takes all of us together to create a seamless education highway in Macon County.

"Collectively, we can impact the growth and prosperity of our region through education."





## SERVING DONORS EFFICIENCY AND RESPONSIVENESS EQUAL CONFIDENCE

Results are unanimous: When ranked on donor satisfaction and community impact, The Community Foundation is a top performer.

Ninety-six percent of respondents to the biennial donor survey were satisfied with The Community Foundation's integrity and trustworthiness — a category most ranked as "very important." More than 90 percent of respondents also were satisfied with The Community Foundation's knowledge of and responsiveness to community needs, and with the quality of The Foundation's staff.

The majority of donors would recommend The Community Foundation to a friend or colleague. Nearly half are likely to increase their giving level, or to give at the same contribution level, over the next five to ten years. Most also feel The Foundation staff has a good understanding of their personal charitable goals.

Many donors supplemented their rankings with personal words of praise:

- "The staff makes every donor feel like the only donor. I am very pleased;"
- "I am proud to be associated with The Community Foundation of Macon County;"
- "My personal giving practice is driven by tax efficiency. The Community Foundation provides wonderful support to execute this."

Donor satisfaction is likely to be further bolstered by The Community Foundation's recent investment in DonorFirst® software — an asset that translates to efficiency for Foundation staff, and a convenient, online, and user-friendly way for donors to view and manage the activity of their funds.

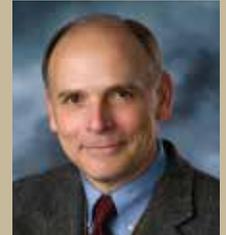
"As the number of individual funds continued to grow over the last few years, we realized that our system for providing donors with timely information about their funds was not going to be adequate," says The Community Foundation President Wegi Stewart. "We decided to explore options for providing donors with online accounting of fund balances, including daily allocation of appreciation, depreciation, and income earned through our pooled investments."

DonorFirst's "heavy-lifting" also makes The Community Foundation's administrative load lighter. Accounting tasks that previously were handled manually are now automatic and uploaded daily, which benefits donors and increases staff's efficiency.

## MAXIMIZING PORTFOLIO PERFORMANCE

The Community Foundation Board's Investment Committee maximizes portfolio performance by walking a strategic line that combines a steady and prudent approach with opportunities to capitalize on donors' investments.

"At every Board meeting, we scrutinize our performance and compare it to particular benchmarks," says Investment Committee Chair Dr. James Wade. "We're charged with holding the public trust, and that requires careful insight and group effort."



Dr. James Wade

For years, the Committee's investment vehicle of choice has been the Russell Balanced Strategy Fund (through Russell Investments), with specific parameters for levels of risk in equities, fixed income, and alternative option funds.

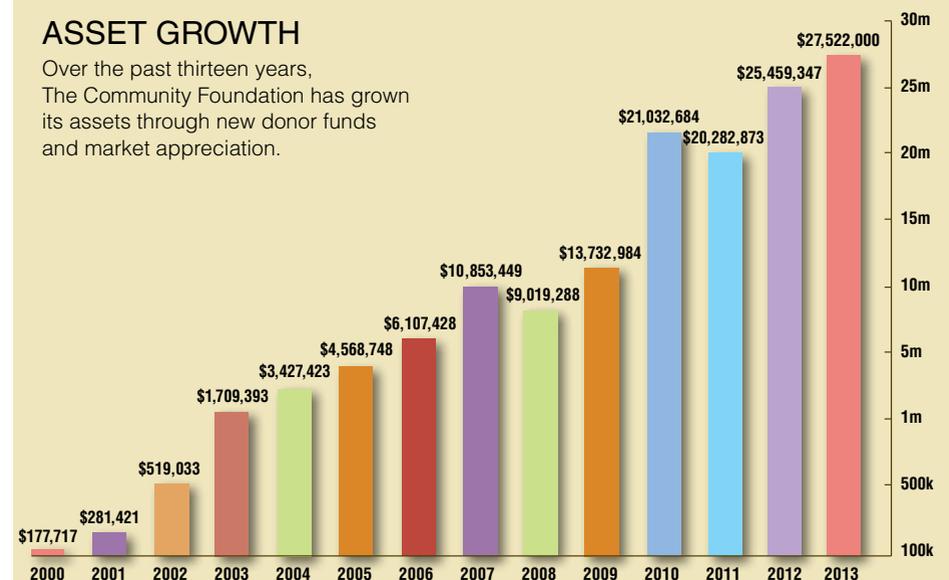
"In the past year, improved software has given us the ability to evaluate how The Community Foundation's portfolio compares to other not-for-profit funds," says Dr. Wade. "We are confident that our fund blend is performing well, and is similar to those throughout the country."

"Our donors are astute individuals," he adds. "They watch their own investments and, while they want them to grow, they don't want investment in high risk funds."

"The theme we always focus on at monthly meetings is, 'how can we do better?' The Board continually challenges itself on behalf of our donors, which ultimately benefits our community."

## ASSET GROWTH

Over the past thirteen years, The Community Foundation has grown its assets through new donor funds and market appreciation.



## WORKING TOGETHER BOARD OF DIRECTORS BUILDS GROWTH



Larry Altenbaumer



Dave Brandon



Kevin Breheny



Walt Hupe



Mark Jackson



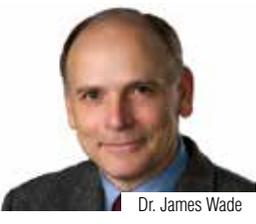
Kathy Locke



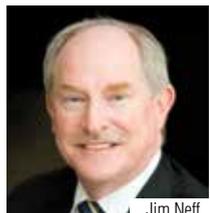
Bruce Nims



Cathy Mansur



Dr. James Wade



Jim Neff



Judge Lisa Holder White



Melissa Watson

Charged as stewards of the community's charitable giving, twelve individuals with diverse professions combine their expertise to continually build the growth and bolster the impact of The Community Foundation.

"We are very compatible and collegial," says Chairman of the Board Kevin Breheny. "But at the same time, no one is afraid to ask a question or to question an opinion.

"This Board expects to make important decisions every time it meets."

Key among those are ongoing decisions about how to best manage The Community Foundation's assets, which topped \$27 million in 2013 and continue to grow. The Board also supported last year's investment in software designed to allow donors more "hands-on" access.

From supporting the goal of The Education Coalition of Macon County to build a stellar education system spanning "cradle to career," to awarding grants designed to impact the quality of life for future generations, Board members are well equipped for the challenges.

"Every person I serve with is open-minded and extremely committed to this community," says three-year Board member Judge Lisa Holder White. "There's a mutual respect among individuals with strong personalities and extensive experience, which is critical when it comes to decision making."

"I've seen The Community Foundation's evolution from a fledgling organization to one that impacts hundreds of local causes," adds Breheny. "It's an honor to serve on this Board."



## BEAUTIFICATION EFFORTS SHINE UNDER SHARED UMBRELLA

Picking up litter; planting flowers; and competing for the best-looking business streetscape are all initiatives credited to the Beautify Decatur Coalition, a group formed in Spring 2012 with the mission to instill a mindset in Decatur residents and businesses to constantly create, maintain, and revitalize a clean, beautiful public presence.

Co-chaired by Jill Davis, who also coordinates the annual Let's Keep Decatur Bee-utiful Contest, and The Community Foundation President Wegi Stewart, the Coalition spearheads task forces for business, neighborhood, and school clean-ups.

"No-litter" zones popped up throughout the community in 2013, with all District 61 schools and more than 100 businesses signing pledges to keep their properties litter-free. Efforts are also underway to collaborate with Coalition of Neighborhood Organizations (CONO) to keep residential properties litter-free.

Coalition members teamed up with students at Millikin University, St. Teresa High School, and Lutheran School Association for three clean-ups on Eldorado Street and also along Merchant Street. Nelson Park also spruced up, thanks to a pairing between the Business Beautification Task Force and Stephen Decatur Middle School students. About sixty planters throughout downtown and along Eldorado Street also bloomed with seasonal annuals.

Initiated in 2013 and held on a quarterly or monthly basis, the Coalition-sponsored "twelve-minute makeover" designates twelve minutes — from noon to 12:12 p.m. — on the 12<sup>th</sup> of the month as a mini-spruce up opportunity to help residents and business owners assume a beautification mindset, according to Davis.

Among the newest Coalition members are Adopt-A-Street, which targets clean-up along major streets throughout the city; and Grow Decatur's "Look And Feel" group, which focuses on green space enhancements along highly trafficked roads such as Pershing and Eldorado.

"I've had comments from many people about how clean Decatur looks," says Davis. "People seem more aware — they're taking plastic litter bags with them on walks, and business owners will walk beyond their own property to pick up litter.

"A lot of people are contributing to the overall beauty and attractiveness of Decatur."



*"A lot of people are contributing to the overall beauty and attractiveness of Decatur."* ~Jill Davis

# IMPACT OF YOUNG PHILANTHROPISTS GIVING CIRCLE WIDENS

Initiated by The Community Foundation of Macon County in November 2012 and designed to inspire philanthropy among young community leaders, The Young Philanthropists Giving Circle (YPGC) marked 2013 with over forty members and a \$1,100 grant to Baby Talk. The award was presented as part of the YPGC's first celebration of "Giving Tuesday," which falls at the beginning of the holiday season and immediately after Black Friday and Cyber Monday.



Other highlights included an opportunity to volunteer at Northeast Community Fund in June (the 2012 grant recipient), and a family event at the Children's Museum of Illinois in September.

The year featured a reception and question-and-answer program, held on November 26 and hosted by YPGC, which featured philanthropist, photographer, and farmer Howard G. Buffett. Buffett discussed his new book, co-authored with his son and titled, "Forty Chances: Finding Hope In A Hungry World."

The Howard G. Buffett Foundation donated \$100 to the YPGC on behalf of each attendee in recognition of the organization's support for the community — contributions which totaled a \$50,000 grant. In turn, the YPGC will award ten, \$5,000 grants in 2014 to non-profit organizations in Macon County that serve children or address hunger, keeping with the spirit of the Howard G. Buffett Foundation.



"To add an interesting twist, we're particularly looking for projects with an entrepreneurial spirit," says The Community Foundation Board Member and YPGC Steering Committee Chair Melissa Watson. "They could be impactful, but perhaps have not had any prior funding. Think 'dream' projects."

"The past year was excellent for YPGC in terms of membership and impact," she adds. "There's so much more we could do, and I look forward to welcoming additional members."



Local agencies work together to tackle Macon County's high teen birth rate.

## COLLABORATION FUELS TEEN HEALTH COALITION

The power of collaboration resulted in more community stakeholders and increased funding for the Macon County Teen Health Coalition.

Initially supported by a donor fund managed through The Community Foundation, the Teen Health Coalition formed in 2008 with the mission of combatting Macon County's high teen pregnancy rates and sexually transmitted disease rates, and working to improve the overall wellness of local youth.

Based on its collaborative spirit and pro-active approach, the Coalition was contacted by the Macon County Health Department and invited to join forces to apply for grant funding from the Illinois Department of Human Services to institute evidence-based prevention programs in area schools.

"Ours was the only group in Illinois that already had a Coalition in place when we applied, and that made us very competitive," says Program Director Miranda Malone. "The grant also propelled the addition of new Coalition members."

Membership currently tops 20 organizations, which represent healthcare, mental health, schools, and neighborhood organizations.

The \$270,000 grant, which took effect in July 2012, enhances programs already implemented in local middle and high schools. Funds also support a weekly, after school program for girls.

Additional Teen Health Coalition activities throughout 2013 included working with District 61 to implement school-based, special activities; and seeking funding for a teen mobile unit to serve high-need areas.

To date, numbers support the collaborative efforts: In 2013, Macon County saw close to a three percent drop in teen births.

"The challenge continues to be getting our message out to teens," Malone says. "But every member of the Teen Health Coalition is committed and ready to help."



Girls enrolled in after-school programming give back to the community through organized events.

# FINANCIAL INFORMATION

<b>Net Assets at beginning of year</b>	<b>\$ 22,778,412</b>
<b>Revenues</b>	
Gifts	\$ 2,588,502
Investment Income	\$ 2,410,729
<b>Total Contributions and Support</b>	<b>\$ 4,999,231</b>
<b>Expenditures</b>	
Grants Given and Program Services	\$ 2,972,816
General Expenses	\$ 332,141
<b>Total Grants and Expenses</b>	<b>\$ 3,304,957</b>
Change in Net Assets	\$ 1,694,274
<b>Net assets at December 31</b>	<b>\$ 24,472,686</b>

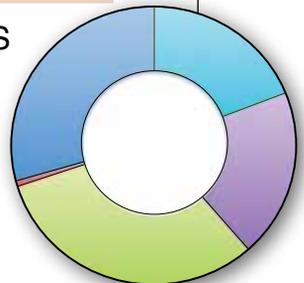
## Statement of Financial Position as of December 31, 2013

<b>Assets</b>	
Cash	\$ 393,918
Investments	\$ 27,122,917
Prepaid Expenses	\$ 4,206
Property and Equipment	\$ 4,819
<b>Total Assets</b>	<b>\$ 27,525,860</b>
<b>Liabilities and Net Assets</b>	
Accounts Payable	\$ 21,060
Agency Endowments	\$ 3,032,114
<b>Total Current Liabilities</b>	<b>\$ 3,053,174</b>
<b>Net Assets</b>	
Administrative Assets	\$ 236,127
Donor Advised & Other Funds	\$ 23,952,202
Temporarily Restricted	\$ 284,357
<b>Total Net Assets</b>	<b>\$ 24,472,686</b>
<b>Total Liabilities &amp; Net Assets</b>	<b>\$ 27,525,860</b>

### TYPES OF FUNDS

(color box as shown in key)

- Donor Advised – 29.42%
- Discretionary – 0.26%
- Field of Interest – 31.65%
- Designated – 19.37%
- Scholarship – 19.30%



A complete set of audited financial statements is available upon request or at

[www.endowdecatur.org](http://www.endowdecatur.org)