The Community is our Foundation

2020 Donor Acknowledgement and Financials
Our Values:

- Act with **Integrity & Transparency**
- Embrace **Diversity & Inclusion**
- Advance **Equity**
- Inspire **Collaboration & Partnerships**

Our Values Defined:

- **Act with Integrity & Transparency** – We preserve the public trust through independent governance, objectivity, and honest leadership. We are open and forthright with one another, donors, grantees, and the community.

- **Embrace Diversity & Inclusion** – We lead by example and use our position in the community to promote greater understanding and use of diversity policies and practices. We practice and champion inclusiveness and honor diverse strengths, needs, voices, and backgrounds.

- **Advance Equity** – We advance equity by promoting policies and practices that eliminate disparities. Our work is to bring the wisdom of community to reimagine a society that works for all.

- **Inspire Collaboration & Partnerships** – We value the transformative power of collaboration and partnerships. By working together on mutual interests we create a more positive and lasting impact on our community.

To learn more about how we incorporate these values, go to www.jacksoncf.org to review our: Equity Statement, Audited Financials and 990, Grant and Scholarship reports, and more!
Challenges Met

2020 was a year in which we all faced many difficult challenges. It’s times like these that a community foundation can be an invaluable asset to the community it serves. Here are a few highlights:

- Staff leadership joined the Jackson Covid Action Network (JCAN) along with many other community leaders.
- JCF collaborated with the United Way of Jackson County to establish the COVID-19 Response Fund, raising $394,000 to support our most vulnerable citizens.
- The Community Needs Fund granted $114,000 in operating funds to our nonprofits, the backbone of programs for our citizens.
- The Dream Maker Fund, a component fund of the Foundation, shifted their grantmaking to provide $1 Million in grants to area small businesses.
- The Consumers Energy Foundation granted JCF $200,000 to support small businesses with a focus on women-owned and minority-owned businesses.
- Several of our Donor Advised Funds granted $170,000 to the “Our Town” restaurant initiative, helping area restaurants while feeding those in need in our community.
- In partnership with Henry Ford Allegiance Health’s Health Improvement Organization, $91,500 was granted to local groups working to dismantle systemic racism.
- JCF had its largest grantmaking year in history with a total of $2.8 Million in grants!

We could not accomplish *any* of these initiatives without *you*, our donor.

With a thankful heart, Monica Moser, President & CEO
**Our Mission**
“We connect people & resources to causes that strengthen and build our community. For Jackson. For good. For ever.”

**2020 at a glance**

$34,502,734 net assets
- as of 12/31/20

$2.8 Million in total grantmaking

- $63,000 healthy people
- $1.43M economic prosperity
- $715,000 education
- $305,000 arts, culture & recreation
- $303,000 strong individuals & families

**$1.78 MILLION IN COVID RELIEF:**
- Dream Maker Fund grants for small businesses: $1,020,370
- "Our Town" restaurant grants: $169,763
- Consumers Energy Small Business grants: $201,300
- *Covid-19 Response Fund: $394,000

- $258,000 Administrative Expense
  - 7% of functional expense

- Assets Under Management 2014-2020

- 144 VOLUNTEERS
- 408 FUNDS
- 332 DONORS
- 8 NEW FUNDS

- $32,000 in Legacy Scholarships were awarded to 32 Jackson County Students. $105,000 in Competitive Scholarships were awarded to 65 students! The average award was $1,200.

- Our Town” restaurant grants: $169,763
- Consumers Energy Small Business grants: $201,300
- *Covid-19 Response Fund: $394,000

*These funds were held at the United Way of Jackson County as part of a collaborative effort.
2020 Donors

Thank You

For choosing your community!

Dr. and Mrs. Brian A. Adamczyk
Dave and Tonni Ogle Adamson
Addison P. Cook III Foundation
Charles M. Adkins
Rob and Katherine Albertson
Alro Steel Corporation
Alvin L. Glick Foundation, Inc.
American 1 Credit Union
American Legion Post 252 Grass Lake
American Legion Post 29
Rachel Anderson
Josnelly Aponte
Art Moehn Auto Group
Neil and Laurie Arvy
Kurtis M. Ashley
Glen and Dana Ashlock
AT&T Michigan
Matthew and Sharon Augustine
Baker College of Jackson
Beverly Baker
Louise Baker
Carrie Barber
William J. Barker
Jill Barclay
Cindy Barrus
Jeff Beal
Alicia Beck
Beck’s Flower Shop & Gardens, Inc.
Brian and Sharon Bell
Cindy and Rick Bellew
Bill and Sara Bellew
Mary Benson
Kristie Bernstein
Best, Heyns, Schroeder & Best, P.C.
Bill and Anne Best
Patrick Bishop
Mark Biskupski
Christopher Blackledge
Barbara Blair
Joe and Barb Blouin
Bond & Company
Mr. and Mrs. George F. Boone
Michelle Boorman
Dr. and Mrs. Jerry B. Booth
Don and Debbie Borton
James Brazee
Paul and Karol Buchholz
Indrea Buckner
Mr. Lawrence Bullen
Sally Bunce
Kelly Bury
John and Lisa Butterfield
Sheri Butters
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Christine Chavez
ERICA Cheatham
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Thomas L. and Jan L. Clark
Lisa Coffey
Consumers Energy Foundation
Consumers Energy Retirees
Thomas Cooper
Council of Michigan Foundations
County National Bank
Mari T. Craft
Richard and Debbie Craft
Sandra S. Craft
Thomas and Coleen Crampton
Culver’s of Jackson
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Mr. and Mrs. Dennis DaPra
Mr. and Mrs. Frederick L. Davies
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David and Karen Desnoyer
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Joseph and Kristen Dubinski
Martin DuBois
Ronald Eblen
Embellishments Gallerie, Inc.
Emmons Service, Inc.
Matthew English
Christopher and Sarah Ermatinger
Janet Eshenroder
Christina Esser
Thomas and Nancy Evanson
Jack Fairly
Linda Finch
Trish Fletcher
Georgia and Travis Fojtasek
Scott and Michelle Fowler
Jeremy Frew
Eric and Kelly Froedtert
James L. Geisman
Ellen Gillespie
Brian and Carrie Glick
Cathy L. Glick, M.D. and Larry Halman
Jamie and Lori Grace
Dr. and Mrs. Edward F. Greene
Suzette Greep
John and Susan Gruel
Jim & Amy Guerrierio
Cole Guthrie
James and Marsha Haehnle
Betty J. Hall
David and Natalie Halsey
Hanover Horton American Legion Post 270
Ethan Harris
Deborah Hartsuff
HB Fuller Company
Headliners Design Studio
Henry Ford Allegiance Health
Mike and Joyce Hermann
Heather Herndon
Rev. James and Leontyne Hines
David C. Hocker
Betsy Holzworth
Michael and Lynn Hood
Allan and Jo Hooper
Jonathan Hoover
Huron Consulting Group Inc.
Iles Schropp Group
Jackson College
Jackson County Intermediate School District
Jackson Northwest Kiwanis Club
Jackson Symphony Orchestra
Tom and Sheryl Jacobs
Willard H. Johnson
Aaron Kantor
Daniel Kapp
Jeff and Phyllis Karmol
Dan and Molly Kaser
Shelly Kasprzycki
Amber Keathley
Charles Keeling
Kennedy Group - Polly's Country Market
Gary and Lynn Kenworthy
James Kerwin
Keyser Insurance Group
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Kiwanis Flowering Trees Project
Wendy Klintworth
David Kloack
Melissa Koester
Herbert and Mary Kops
Gary and Jann Krupa
Makendra Krutsch
Martha Kuhn
Jerry and Diane LaFaive
Jon and Donna Lake
Taylor Lancaster
Joel Landenberger
Dr. and Mrs. Kevin Lavery
Jean Laughlin
Law Office of Philip M. Moilanen, P.C.
2020 Donors

For choosing your community!

Ishwar Laxminarayan and Jayashree Ishwar
Robert and Laurie LaZebnik
Christine Leadon
Gregory and Jonella Leadon
Mr. and Mrs. Jeffrey C. Leathead
Craig Leeper
Honorable Carlene Walz Lefere
James A. Lefere
Blake Lertzman
Libra Industries
Kathleen Lincoln
Larry Lloyd
William Loll
Martin and Karen Lozier
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Frank Lusebrink Jr.
Macchia Family Foundation
Dennis and Kim Maino
Terry and Jan Maino
John Malone
Leigh Malone
Mark Marcucci
Sandra Marcucci
Gregory Marsh
Jan Marshall
Master Radiator LLC
Susan Maxson

Carter Mazur and Owen Campbell
Stanley and Meredith Mazur
Kim McCollum
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McGowan Electric Supply, Inc.
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Mary M. McVicker
Ronald Mealoy
Dr. R. Charles and Christina Medlar
Kirk and Marty Mercer
Merrill Lynch
Michigan Automotive Compressor
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Denise Miller
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Carolyn Moser
Monica Moser and Steven Trosin
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Chuck and Chris Murphy
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National Instruments
Mr. and Mrs. William Nichols, Jr.
Chad and Jennifer Noble
Northwest High School
Northwest School District

Onsted Kiwanis Club
Cindy O’Rourke
Shirley Ottmer
Kevin and Michele Oxley
John and Frances Parker
Richard and Barbara Parks
Sarah Patch
Drs. Jashu and Bhavna Patel
William Patterson
Travis and Armida Pearse
Don and Sue Peck
Jerry and Rosemary Peters
Geraldine Phelps
Rita A. Phipps
Dale Pierce
Willye Pigott
Connie Poisson
Patti and Eric Poppe
Frank and Carolyn Pratt
Timothy Pryor
Charlene Pung
Russell A. Purvis
Shannon Putra
Maritom K. Pyron
Queen of the Miraculous Medal Parish
Wallace Ramp
Dr. and Mrs. K. Vidyasagar Rao
2020 Donors

Rehmann
Brian and Sarah Richmond
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Lyman Robertson, Jr.
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John Rosenbeck
Vicki Rosenbeck
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Elody Samuelson
Mrs. Marceleine Sautter
Steven and Annette Scarpino
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Dan and Mary Beth Scheid
Mark Schissler
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Scott Machine, Inc.
Searles Family Foundation
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Drs. Jim and Wendy Serino
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Timothy and Susan Swedine
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Don Tassie
Jack and Ann Teneyck
Linda Thayer
The Craft Agency
The Dawn Foods Foundation
The Erma E. Biedermann Student Scholarship Fund
The Exchange Club of Jackson
The Fraternal Order of Police Jackson Lodge 70
Dr. and Mrs. V. S. Thyagarajan
TKM Farms, Inc.
Trendway Corp
Ann Tropiano
True Community Credit Union
United Way of Jackson County
Stephen Vanderveen
Libby VerKuilen
Robin Walker
Susan Holmes-Walker
Mary Walz & Neil Johnston
Michael and Frances Wartella
Angela Watkins
Mike Way
Frank and Renell Weathers
Ari Weinzeig
Frances Welty
Western School District
White & Hotchkiss, PLLC
Dennis and Marcia Whitehead
Dennis Whedon
James White
Dr. Craig D. and Susan Whitmore
Paul Wilcox
Robert Williams

For choosing your community!
2020 Donors

In Memory

James and Judith Wilson
Ben and Kendra Winn
Joe and Judy Wolfe
Ken and Carol Woodhurst
Karen Worthy
Chuck and Sue Wrzesinski
Z. Studios LLC
Vincent Zahm

In Memory

In Honor

Clients of Keyser Insurance Group
Dawn Hardy
Kelli Hoover
The Jones Family
Ron and Marvel Jones
Carlene Walz Lefere
Lily Missions
Dan and Peggy Ramp
Angela Klobuchar-Rosenbeck
Hendrik Schuur
Jenn Tejada and Michael Firmin
USS Arizona Exhibit
Mary Walz and Neil Johnston
Patrick and Suzanne Walz & Family
Susan Walz and Jeffrey Goldberg
Renell Weathers

It starts with YOU the donor

With a LOVE for your community

Whose GIFTS are used

To CREATE & BUILD for your community

with the INCOME from these funds going back to the causes you love
The Jackson Community Foundation was founded in 1948 with two very special gifts. During World War II, the families of Lt. John L. Carter and Pfc. John Gilbert Wickwire donated proceeds from life insurance policies that were purchased in the name of their sons, both of whom lost their lives in battle. The Jackson War Chest accepted the insurance contribution, plus additional gifts added by each family. When discussion of starting a community foundation began, a total of $20,000 was transferred to begin a permanent endowment for Jackson County.

The Carter and Wickwire families understood the importance of planning for the future and creating a legacy for their families. By naming the Jackson Community Foundation in your will, you can join a distinctive list of individuals and families who are doing the same. Become a Carter-Wickwire Society member today!

Matthew D. and -Sharon A. Augustine
Jody Bacon
Mary Baird
Jackie and Jerry Booth
Carole and John Briggs
Lawrence L. Bullen
John and Lisa Butterfield
Georgia Fojtasek
Jim and Joyce Grace
Mr. Richard Allen Iverson
Mary Theresa Mills Family
R. Dale Moretz
Monica Moser and -Steven Trosin
Chad Noble
Hendrik Schuur
Richard Sigers
Al Spiess, Jr.
Sandra Svoboda
Ric Walton
Carlene Walz Lefere

Carter-Wickwire Philanthropist of the Year Recipients

Since 2018, The Carter and Wickwire Philanthropy Award honors a living individual or couple for service as both volunteer/trustee and donor to help grow community philanthropy in Jackson. Congratulations to the following recipients:

2018 Carlene Walz Lefere
2019 Georgia and Travis Fojtasek
2020 Tony Hurst
2021 Dr. Jerry Booth

CARTERwickwire Society

DONOR ADVISED FUNDS

1. GIVE CASH OR ASSETS
2. INCOME TAX DEDUCTION
3. DONOR ADVISES HOW TO DISTRIBUTE FUNDS
### 2020 Financials

#### ASSETS

<table>
<thead>
<tr>
<th>Description</th>
<th>12/31/2020</th>
<th>12/31/2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash</td>
<td>$254,205</td>
<td>$783,795</td>
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<tr>
<td>Receivables</td>
<td>$64,547</td>
<td>$4,074</td>
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<tr>
<td>Prepaid Expenses</td>
<td>$4,907</td>
<td>$8,029</td>
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<tr>
<td>Total Current Assets</td>
<td>$323,659</td>
<td>$795,898</td>
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<tr>
<td>Investments</td>
<td>$33,246,131</td>
<td>$29,506,657</td>
</tr>
<tr>
<td>Furniture &amp; Equipment, Net</td>
<td>$16,509</td>
<td>$20,783</td>
</tr>
<tr>
<td>Beneficial Interest in Trust</td>
<td>$3,063,463</td>
<td>$2,840,889</td>
</tr>
<tr>
<td><strong>Total Assets</strong></td>
<td><strong>$36,649,762</strong></td>
<td><strong>$33,164,227</strong></td>
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#### LIABILITIES AND NET ASSETS

<table>
<thead>
<tr>
<th>Description</th>
<th>12/31/2020</th>
<th>12/31/2019</th>
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<tbody>
<tr>
<td>Liabilities</td>
<td></td>
<td></td>
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<tr>
<td>Current Liabilities</td>
<td>$67,266</td>
<td>$27,138</td>
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<tr>
<td>Assets Held for Agency Funds</td>
<td>$2,079,762</td>
<td>$1,929,419</td>
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<tr>
<td><strong>Total Liabilities</strong></td>
<td><strong>$2,147,028</strong></td>
<td><strong>$1,956,557</strong></td>
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<tr>
<td>Net Assets</td>
<td></td>
<td></td>
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<tr>
<td>Without Donor Restrictions</td>
<td>$29,745,286</td>
<td>$26,809,631</td>
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<tr>
<td>With Donor Restrictions</td>
<td>$4,757,448</td>
<td>$4,398,039</td>
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<tr>
<td>Total Net Assets</td>
<td>$34,502,734</td>
<td>$31,207,670</td>
</tr>
<tr>
<td><strong>Total Liabilities and Net Assets</strong></td>
<td><strong>$36,649,762</strong></td>
<td><strong>$33,164,227</strong></td>
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</tbody>
</table>

#### ACTIVITIES

<table>
<thead>
<tr>
<th>Description</th>
<th>12/31/2020</th>
<th>12/31/2019</th>
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<tbody>
<tr>
<td>Contributions</td>
<td>$3,050,563</td>
<td>$1,869,295</td>
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<tr>
<td>Net Investment Income</td>
<td>$3,250,037</td>
<td>$4,600,375</td>
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<tr>
<td>Change in Value Beneficial Interest</td>
<td>$222,574</td>
<td>$834,161</td>
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<tr>
<td>Other Support</td>
<td>$39,937</td>
<td>$102,181</td>
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<tr>
<td><strong>Total Revenues and Gains</strong></td>
<td><strong>$6,563,111</strong></td>
<td><strong>$7,406,012</strong></td>
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<tr>
<td>Expenses</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Program Services</td>
<td></td>
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</tr>
<tr>
<td>Grants and Scholarships</td>
<td>$2,735,445</td>
<td>$1,062,858</td>
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<tr>
<td>Other Program Services</td>
<td>$172,534</td>
<td>$205,715</td>
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<tr>
<td>Total Program Services</td>
<td>$2,907,979</td>
<td>$1,268,573</td>
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<tr>
<td>Management and General</td>
<td>$257,991</td>
<td>$278,346</td>
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<tr>
<td>Fundraising</td>
<td>$102,077</td>
<td>$125,692</td>
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<td><strong>Total Expenses</strong></td>
<td><strong>$3,268,047</strong></td>
<td><strong>$1,672,611</strong></td>
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<tr>
<td>Change in Net Assets</td>
<td>$3,295,064</td>
<td>$5,733,401</td>
</tr>
<tr>
<td>Net Assets - Beginning of Year</td>
<td>$31,207,670</td>
<td>$25,474,269</td>
</tr>
<tr>
<td><strong>Net Assets - End of Year</strong></td>
<td><strong>$34,502,734</strong></td>
<td><strong>$31,207,670</strong></td>
</tr>
</tbody>
</table>
Accountability: The Jackson Community Foundation is fully accountable to the donors and citizens of this community. An independent audit is conducted annually, currently conducted by Yeo & Yeo CPAs and Business Consultants. An unqualified opinion of the Jackson Community Foundation was issued for 2019-2020. Please contact our office if you would like a copy of the audited financial statements, IRS Form 990 or any of the Foundation policies. You can also visit www.jacksoncf.org to obtain this information.