Jackson Community Foundation

For **Jackson.** For **good.** For **ever.**

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 Mission:

Our Vision:

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 <u>you</u>, our donor.

With a thankful heart, Monica Moser, President & CEO

The Community is our Foundation

2020 at a glance

Our Mission

"We connect people & resources to causes that strengthen and build our community. For Jackson. For good. For ever."

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

Youth Advisory Committee

is a mini-foundation made up of 24 local students who review education & youth-related grants. Two of them are voting members of the Board. In 2020, YAC awarded 17 grants totaling $23,629.00

$2.8 Million in total grantmaking

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

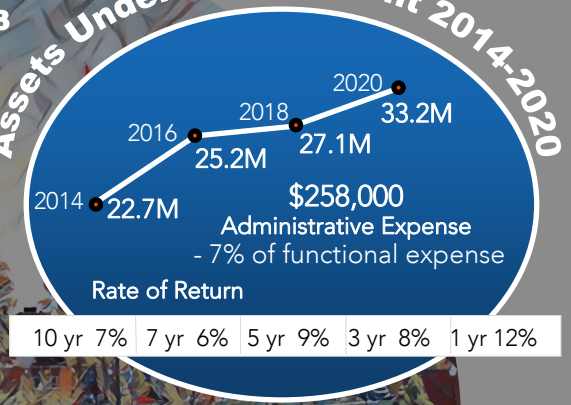
$1.78 MILLION IN COVID RELIEF:

- **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**

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.

Assets Under Management 2014-2020



Rate of Return

10 yr	7 yr	5 yr	3 yr	1 yr
7%	6%	9%	8%	12%

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

2020 Donors

For choosing your community!

Dr. and Mrs. Brian A. Adamczyk
Dave and Tonni Ogle Adamson
Addison P. Cook III Foundation
Charles M. Adkins
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Alro Steel Corporation
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American Legion Post 29
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Betty L. Desbiens
David and Karen Desnoyer
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2020 Donors

For choosing your community!

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Jackson Northwest Kiwanis Club
Jackson Symphony Orchestra
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Keyser Insurance Group
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Kiwanis Flowering Trees Project
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2020 Donors

For choosing your community!

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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
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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

For choosing your community!

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Lyman Robertson, Jr.
Marilyn and Gerald Rockwell
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Tom and Jenny Smith
Mark and Barbara Snyder
Carl F. Spaeth, III
Nan and Sparry Sparks
Speckhard-Knight Charitable Foundation
Tracy Spring
Stockbridge Area Educational Foundation
Nancy Stoker
Clara C. Stone
Emily Stover
Anthony Sussex
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Cathy Sykes
Kelly Szymanski
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 Weinzweig
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

2020 Donors

For choosing your community!

Continued

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

All those lost on the USS Arizona at Pearl -Harbor
Felix and Eileen Best
Chris Brian
Jim Brian
Officer James D. Bonneau
Valerie L. Bullen
Lauren Caster
Robert D. Craft

In Memory

Ernie Davidson
Melissa Eleanor Ernest
Clarice Huether
Tim and Daniel Hughes
Wendell Jacobs
Dr. Larry Jennings
Philip and Katherine Keeling
Tony Krupa
Andy LaFaive
Mary McVicker
Nancy Mealoy
Kevin G. Miller CPA
Mary Theresa Mills
David Ogle II
Barbara Ramp
Everett Romain
Paul Scott
Robert Shefferly
Paul Tejada
Jeanne Wetherby

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

Carter Wickwire Society

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.

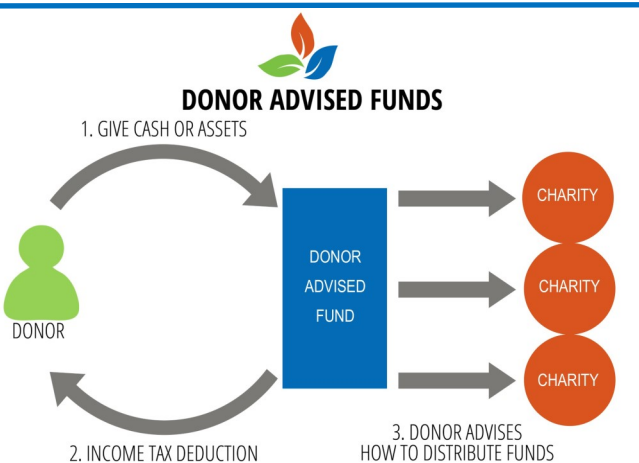
The Carter and Wickwire families understood the importance of planning for the future and creating a legacy for their families. By naming the Jackson Community Foundation in your will, you can join a distinctive list of individuals and families who are doing the same. Become a Carter-Wickwire Society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



2020 Financials

ASSETS

FOR YEAR ENDING	*12/31/2020*	*12/31/2019*
Cash	$ 254,205	$ 783,795
Receivables	$ 64, 547	$ 4,074
Prepaid Expenses	$ 4,907	$ 8,029
Total Current Assets	$ 323,659	$ 795,898
Investments	$ 33,246,131	$ 29,506,657
Furniture & Equipment, Net	$ 16,509	$ 20,783
Beneficial Interest in Trust	$ 3,063,463	$ 2,840,889
TOTAL ASSETS	$ 36,649,762	$ 33,164,227

LIABILITIES AND NET ASSETS

LIABILITIES		
Current Liabilities	$ 67,266	$ 27,138
Assets Held for Agency Funds	$ 2,079,762	$ 1,929,419
TOTAL LIABILITES	$ 2,147,028	$ 1,956,557
NET ASSETS		
Without Donor Restrictions	$ 29,745,286	$ 26,809,631
With Donor Restrictions	$ 4,757,448	$ 4,398,039
Total Net Assets	$ 34,502,734	$ 31,207,670
TOTAL LIABILITIES AND NET ASSETS	$ 36,649,762	$ 33,164,227

ACTIVITIES

FOR YEAR ENDING	*12/31/2020*	*12/31/2019*
Contributions	$ 3,050,563	$ 1,869,295
Net Investment Income	$ 3,250,037	$ 4,600,375
Change in Value Beneficial Interest	$ 222,574	$ 834,161
Other Support	$ 39,937	$ 102,181
TOTAL REVENUES AND GAINS	$ 6,563,111	$ 7,406,012

EXPENSES

Program Services		
Grants and Scholarships	$ 2,735,445	$ 1,062,858
Other Program Services	$ 172,534	$ 205,715
Total Program Services	$ 2,907,979	$ 1,268,573
Management and General	$ 257,991	$ 278,346
Fundraising	$ 102,077	$ 125,692
TOTAL EXPENSES	$ 3,268,047	$ 1,672,611
Change in Net Assets	$ 3,295,064	$ 5,733,401
Net Assets - Beginning of Year	$ 31,207,670	$ 25,474,269
NET ASSETS - END OF YEAR	$ 34,502,734	$ 31,207,670

COMMUNITY ACCREDITED FOUNDATION
Excellence. Accountability. Impact.™

Confirmed in compliance with National Standards for U.S. Community Foundations.

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.