



*The Community is our Foundation*

**2020 Donor Acknowledgement and Financials**



- 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.

## Our Mission:



## Our Vision:



To learn more about how we incorporate these values, go to [www.jacksoncf.org](http://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 **\$100,000** 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.
- \$XXXX was granted to nonprofits working on programs that dismantle racist barriers through our Tackling Systemic Racism grant round.
- 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

## 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



**\$63,000** healthy people



**\$1.43M**  
economic prosperity



**\$715,000** education

**\$2.8 Million in total grantmaking**



**\$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**

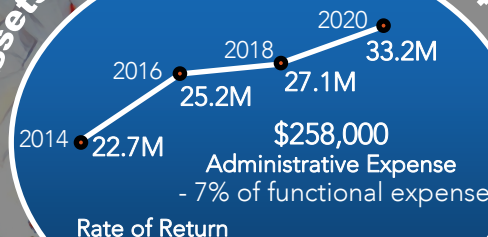


**Consumers Energy Small Business  
grants: \$201,300**



**\*Covid-19 Response Fund: \$394,000**

**Assets Under Management 2014-2020**



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

\*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  
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# 2020 Donors



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# 2020 Donors



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Ishwar Laxminarayan and Jayashree Ishwar  
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# 2020 Donors



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Kelly Szymanski  
Don Tassie  
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The Erma E. Biedermann Student Scholarship Fund

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United Way of Jackson County  
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Mary Walz & Neil Johnston  
Michael and Frances Wartella  
Angela Watkins  
Mike Way  
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Ari Weinzwieg  
Frances Welty  
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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  
Gerald Knight  
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**

**To CREATE & BUILD  
for your community**

**With a LOVE for  
your community**

**with the INCOME from these funds going back to the  
causes you love**

**Whose GIFTS are used**

# 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!

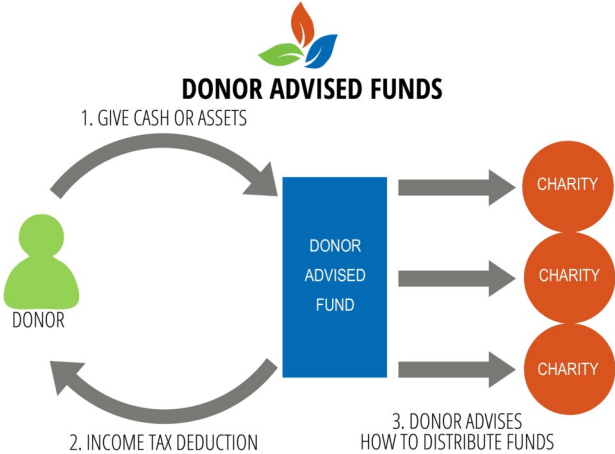
Matthew D. and -Sharon A. Augustine Jody Bacon Mary Baird	Jackie and Jerry Booth Carole and John Briggs Lawrence L. Bullen John and Lisa Butterfield Georgia Fojtasek	Jim and Joyce Grace Mr. Richard Allen Iverson Mary Theresa Mills Family R. Dale Moretz	Monica Moser and -Steven Trosin Chad Noble Hendrik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

<i>FOR YEAR ENDING</i>	<i>12/31/2020</i>	<i>12/31/2019</i>
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
<b>TOTAL ASSETS</b>	<b>\$ 36,649,762</b>	<b>\$ 33,164,227</b>

## LIABILITIES AND NET ASSETS

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

## ACTIVITIES

<i>FOR YEAR ENDING</i>	<i>12/31/2020</i>	<i>12/31/2019</i>
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
<b>TOTAL REVENUES AND GAINS</b>	<b>\$ 6,563,111</b>	<b>\$ 7,406,012</b>

## EXPENSES

<b>Program Services</b>		
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
<b>TOTAL EXPENSES</b>	<b>\$ 3,268,047</b>	<b>\$ 1,672,611</b>
Change in Net Assets	\$ 3,295,064	\$ 5,733,401
Net Assets - Beginning of Year	\$ 31,207,670	\$ 25,474,269
<b>NET ASSETS - END OF YEAR</b>	<b>\$ 34,502,734</b>	<b>\$ 31,207,670</b>



# Jackson Community Foundation

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## For Jackson. For good. For ever.



**MERRILL**  
A BANK OF AMERICA COMPANY

The Moore Schropp Group

Thank you to our investment consultants at The Moore Schropp Group for helping to produce this publication!



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](http://www.jacksoncf.org) to obtain this information.