



2019 ANNUAL REPORT

Caring Community Foundation, Inc. of Northeast Kansas

WHAT IS THE CARING COMMUNITY FOUNDATION?

The Caring Community Foundation serves as a steward for charitable causes in NE Kansas and as an investor for our communities' futures. We are recognized by the IRS as a 501(c)(3) public charity.

Established in 2016, the CCF completed its third full year in February 2019. We are an independent community foundation with a local board, investing through The Trust Company of Manhattan, KS. We are honored to have been chosen by hundreds of people and organizations who have donated, invested, pledged and planned bequests in this short time.

The CCF invests funds and uses the income, in the form of grants, to help meet the communities' charitable needs. Most funds are endowed permanent funds that create a sustainable flow of grant dollars forever. Through prudent professional investment, both the funds and their earnings available for distribution, grow over time.

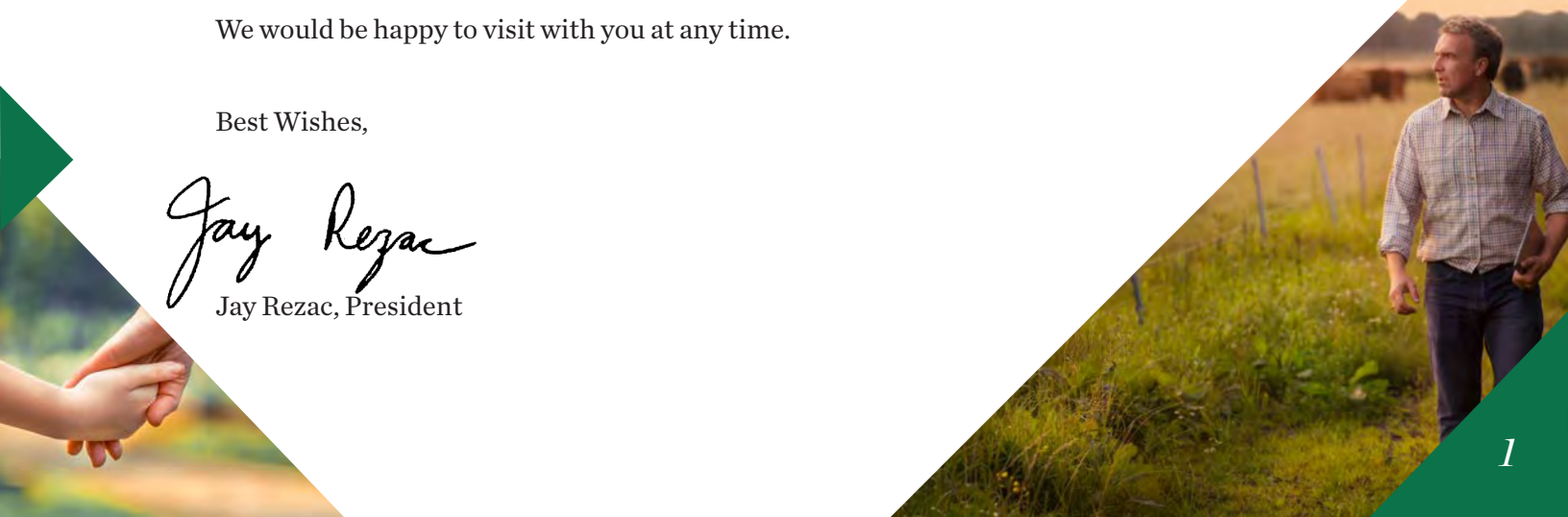
The CCF is local and safe. As a community foundation, we can accept and provide funding for charitable causes and for nonprofit organizations across the general area of Pottawatomie, Marshall, Nemaha and Jackson Counties in Kansas. Community foundations are one of the safest places to invest your charitable gifts due to specific oversight by IRS requirements that go beyond that of other nonprofit organizations.

The Caring Community Foundation strives to be innovative, responsive and accountable - opening doors and building sustainability for your inspired philanthropy!

We would be happy to visit with you at any time.

Best Wishes,


Jay Rezac, President



WHO IS THE CARING COMMUNITY FOUNDATION?

Board Members:

Jay Rezac, *Chair* (Onaga)

Jim Moore, *Treasurer*

(Westmoreland),

Carol Pollock (Havensville),

Rebecca Rookstool (Wamego)

Jay Kennedy (Frankfort)

Eugene Berges, *Vice Chair* (Onaga)

Robert Ladner, *Secretary* (Onaga)

Nick Novelly (St. Marys)



Staff:

Susie Kufahl, *Executive Director*

Julie Wren, *Assistant*



CCF FUNDS & DESCRIPTIONS

**New this year in blue.*

Community Fund: \$182,444

Offers flexibility to address the needs of the region and operational needs.

Donor Advised Funds: \$203,421

Support broad charitable purposes specified by the donor.

- Wayne Stallard Family Fund and
Bruce Wayne Stallard Scholarship

Scholarship Funds: \$390,237

- Auxiliary for Community Hospital District
#1 Scholarship Fund
- *CHCS Healthcare Scholarship*
- Krouse Family Agricultural Scholarship Fund
- Jennifer K. Moore Nursing Scholarship Fund
- *Onaga Alumni Scholarship*
- *Ron R. Lee and Richard J. Rosenfield
Scholar-Athlete Scholarship*
- Walter Byers Scholarship Fund
- *Wayne Dunafon Memorial Scholarship*
- Westmoreland (Brill) Scholarship Fund

Designated Funds: \$74,396

Benefit one or more named charities.

- Carol and Robert Williamson Fund for CHCS
- CHCS Infusion Room Fund
- Friends of USD 322
- *Onaga FFA Alumni Endowment*

Acorn Funds: \$11,194

New funds intended to grow to at least \$5000 for investment within a few years

- Onaga Golf Fund
- Onaga Football Alumni Fund
- *Our Lady of Peace Cemetery Fund*
- *St. Mary's Academy Teachers Fund*

Foundation Net Assets: \$861,692

Agency Funds: \$118,446

Professional investment of expendable funds to support area non-profit organizations.

- Community HealthCare System Fund
- First Congregational Church of Onaga Fund
- *Onaga Historical Society Fund*
- *Rock Creek Valley Historical Society Fund*

Total Net Assets & Agency Funds as of December 31, 2018

\$980,138



GRANTS & SCHOLARSHIPS

Caring Community Foundation grants and scholarships provide positive support for people, organizations and communities, thanks to the generosity of our donors and sponsors. We are very grateful for the 2018 sponsors of our philanthropic efforts: Blue Valley Tele-communications, Home; Buffalo Grill & Pizzeria, Onaga; Bluestem Electric Cooperative, Wamego and Clay Center; and CoBank, Denver. During 2018, the Caring Community Foundation awarded \$13,800 for scholarships and to address needs in the communities of Westmoreland, St. George, St. Marys and Onaga.

- 1) Community HealthCare System (CHCS) added two \$500 scholarships for seniors graduating from their Family Practice Clinic towns and pursuing a career in healthcare.
- 2) Onaga Football Alumni hosted a golf tournament to help fund their support of youth sports.
- 3) The CCF awarded a grant to the Conversion Place to help with their clothing and food assistance community program.
- 4) The CCF awarded a grant to the Rock Creek Valley Historical Society.
- 5) Co-Bank and Bluestem Electric awarded a grant to the CCF to help us fund community services.
- 6) The CCF awarded a grant to the City of Onaga for new signage.



LEAGUE OF EXTRAORDINARY GIVERS

Annual givers recognized at these levels, excluding pass-through project and agency funds.

► **Initiator** \$25 – 499

Anonymous, Dr. Randy and Angie Tarvin, John and Elvina Grossnickle, Ralph and Maureen Ebert, Robert Brunkow, Robert and Debra Schwarz, Verne Ratcliff, Almon and Verda Brunkow, Chris and Vicki Flattery, Jeff and Christy Koelzer, Clarence and Ruth Teske, Gary and Linda Ladner, Philip Lacy, SBS Insurance, Sally Williams, Ken Underwood, Jolene and Lorenzo Cervantes, Roger Eggerling, Terry and Sally Force, Richard Gray, John Koelzer, John and Paulette Simecka, Linda Tessendorf, F. L. and Donna Holliday

► ► **Friend** \$500 – 999

Alex and Regina Fairbanks, Jay and Carolyn Schlegel, Jerry Rice, Kan-Equip, Pat and Rita Keating, Kevin and Tara Logan, Marilyn and Pat McCourt, Oakes Auto

► ► ► **Champion** \$1000 – 4999

Anonymous, Pam and Bruce Bachman, Eugene and Deborah Berges, Bob's Service, Lanny and Nancy Bosse, Justin and Virginia F. Boswell, Rheva Boswell, John and Annette Cline, Farmers State Bank, John and Regina Gronewoller, Milton and Dorothy Henneberg, Jay and Maggi Kennedy, Joe and Marybeth Kennedy, Tim and Cindy Kite, Jay and Susie Kufahl, Marten Dozing, Nicholas and Denise Novelly, Nina Oakes, Onaga Pharmacy, Dan and Carol Pollock, Barbara Rezac, Debra and Lance Rezac, Jay and Stacy Rezac, Deb Stallard, Steve and Anne Suther, Dr. Marcus and Meghan Weiser, Gerry and Roberta Kufahl, Joe and Karen Harder, Lion's Club of Onaga, Nola Wilkerson, Terry and Dena Schmitz, Walter Byers Trust, Todd and Nancy Willert, Marjorie Conklin, Dr. Tom and Marcia Walsh, XTO Energy, Rosalind and Rick Lewis, Leon and Carolyn Teske, Lester and Jo Harris, Fred and Dena Marten

► ► ► ► **Steward** \$5000 – 9999

Onaga Football Alumni, James and Jennifer K. Moore

► ► ► ► ► **Benefactor** \$10,000 +

Onaga FFA Alumni, Onaga Alumni, Lorraine Dunafon, Community HealthCare System, Ron R. Lee and Richard J. Rosenfield Scholarship

DONOR PERSPECTIVES

“

Only by *giving*

are you able to

receive more

than you already have.

~ Jim Rohn

”



Dr. Marcus Weiser

I feel blessed to live in a small town. My wife and I would not raise our children anywhere else. One of the great things about living in a rural community is our ability to effect change. I am excited about the countless opportunities available for our future communities through the support of the Caring Community Foundation. I am thankful for anyone who might choose to generously support the campaign to grow an endowment for our hospital. A stable healthcare system is an incredible benefit to all of us. Also, I am thankful for those generous enough to be members of “100 people who care.” Through the Caring Community Foundation, our local opportunities to be charitable include scholarships to help educate our kids, support for the future of local agribusiness, helping future needs of our communities, and many others. Joining our gifts together can help improve our already great communities.





Nola Wilkerson

For some years I was closely involved in working to maintain the mission of the Rock Creek Valley Historical Society Museum in Westmoreland. Like many other museums in small towns it has managed to stay afloat through the efforts of volunteers, donations, fund raisers, and annual contributions from county funds designated for this specific purpose. With all the heart and help of many residents and former residents, it was obvious that even a small crisis requiring large expenditures of money could be extremely difficult and perhaps impossible to overcome. My concern always was that if donations dried up, volunteer availability slackened, and governmental changes affecting budget reductions collided we might not even be able to maintain, let alone improve in any way. There would be no backup for keeping the museum afloat. I began to wish for a way to start a foundation that could be funded with small to larger donations that could be invested to grow and provide for future maintenance and improvements.

Efforts of new volunteers with various important skills helped to make much needed improvements, but the future was still a concern of those of us interested in the preservation of our history. When I learned about the Caring Community Foundation and how many ways it works to help the businesses, schools, organizations, and other entities within communities of this area, I thought this might be a good opportunity for the museum. Although I was no longer a board member nor actively volunteering, I was pleased to learn that others shared my same concerns and hopes and were starting a fund with the foundation for the museum. I proudly contributed to that fund and also to the general fund which keeps the foundation working, and helps provide special assistance through grants for special projects or scholarships for certain purposes. I hope to be able to contribute to or begin a special scholarship fund in the future, as well as continuing support to the Rock Creek Valley Historical Society Museum.

Aside from the fact this foundation provides such varied assistance to our needs and those of our neighboring communities, what I like most is that it seems so personal. The board members are members of our communities and are known to us. They understand our situations up close and personal and can make decisions based on their personal knowledge of the people and organizations involved. Funds have been invested and managed wisely and provide good financial gains to secure future growth and success. Sometimes I have felt that my contributions to large, national organizations are all spent on 'gifts' and mailings requesting more money. Not so with CCF--I feel assured that any contribution I make to this foundation or any fund directly under its umbrella is spent for its intended purpose.

STATEMENT OF NET ASSETS

(unaudited)

	DEC. 31, 15	DEC. 31, 16	DEC. 31, 17	DEC. 31, 18
<i>Assets</i>				
Cash & Investments				
Cash on hand			5,000	197
Farmers State Bank	92,717	12,639	78,399	18,501
The Trust Company	-	424,059	607,301	892,511
Total Checking/Savings	92,717	436,698	690,700	911,209
Pledges Receivable	-	-	67,000	70,417
TOTAL ASSETS	\$ 92,717	\$ 436,698	\$ 757,700	\$981,626

Liabilities & Net Assets

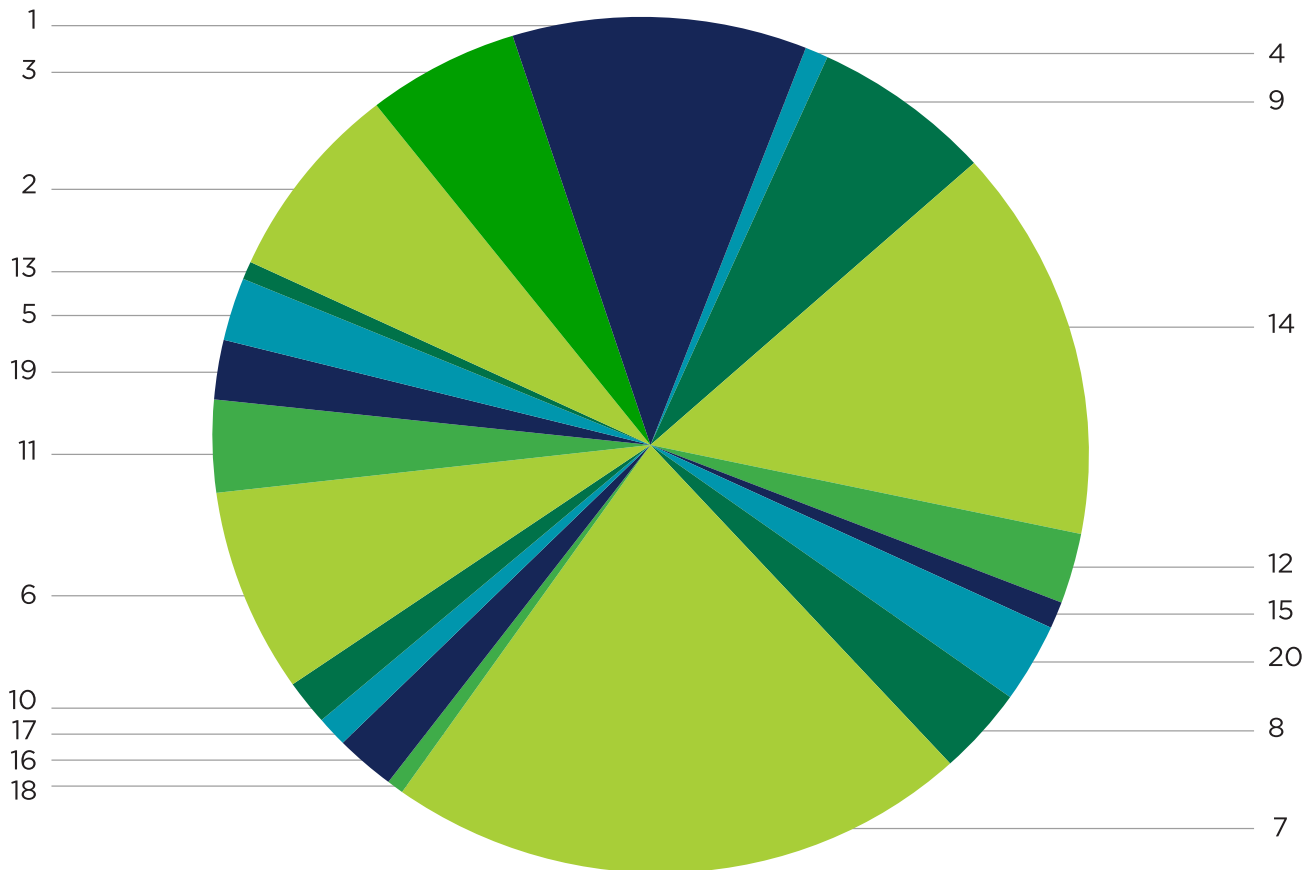
Liabilities				
Accounts Payable		713	1,348	1,488
Agency Funds	42,686	32,581	107,768	118,446
Total Liabilities	42,686	33,294	109,116	119,934
Prior Year Net Assets	-	50,031	403,404	648,584
Current Year Change	50,031	353,373	245,180	213,108
Net Assets	50,031	403,404	648,584	561,692
TOTAL LIABILITIES & NET ASSETS	\$ 92,717	\$ 436,698	\$ 757,700	\$981,626



CCF ACCOUNT SUMMARY

3-13-2019

The pie chart below shows the fund make up of over \$1 million of our investments as of March 13th, 2019.



- | | |
|--|---|
| 1. CCF Community Fund | 11. Krouse Family Endowed Agricultural Scholarship Fund |
| 2. Walter Byers Endowed Scholarship | 12. Onaga Historical Society Agency Fund |
| 3. Community HealthCare System Agency Fund | 13. Onaga Football Alumni Acorn Fund |
| 4. Friends of USD 322 | 14. Onaga Alumni Scholarship Fund |
| 5. Jennifer K. Moore Endowed Nursing Scholarship | 15. Wayne Dunafon Memorial Endowed Scholarship Fund |
| 6. Westmoreland (Brill) Scholarship Fund | 16. Ron R. Lee & Richard J. Rosenfield Scholarship Fund |
| 7. Wayne Stallard Family Fund & Bruce Wayne Stallard Scholarship | 17. Onaga FFA Alumni Endowment Fund |
| 8. Carol & Robert Williamson Endowment for CHCS | 18. Rock Creek Valley Historical Society Agency Fund |
| 9. Onaga Congregational Church Agency Fund | 19. CHCS Endowed Healthcare Scholarship Fund |
| 10. CHD#1 Auxiliary Endowed Scholarship Fund | 20. Rock Creek FFA Alumni Endowed Fund |

WAYS TO GIVE

There are many ways to become part of the Caring Community Foundation and make a lasting contribution to your community:

- ▶ Join *100 People Who Care!* A group of community-minded people who have agreed to donate \$4000 within four years to the unrestricted Community Fund at the Caring Community Foundation. The community fund can respond to unforeseen local community needs, provide grants and help cover fundamental operating costs of the foundation. 100 People Who Care are special people who love their community and want to protect local resources for future generations. 100 People Who Care are the founders of the Caring Community Foundation and will be remembered and appreciated always.
- ▶ Establish and *name your own fund*, a family fund, a scholarship fund, or a memorial fund, with a gift of \$10,000 or more.
- ▶ Establish a designated fund to benefit a *specific nonprofit* organization or charity (a school, hospital, volunteer fire fighters, art guild or other non-profit organization), or a field of interest fund (arts/culture, health, human services, religion, education, environment, etc.) with a gift of \$10,000 or more.
- ▶ Support our *greatest community needs* and opportunities, as well as operating expenses, by contributing any amount to our Community Unrestricted Fund.
- ▶ Establish an *Acorn Fund* with \$5000. An Acorn Fund is intended to grow to a value of \$10,000 within five years, but can be invested with just \$5000. An Acorn Fund can be for a designated non-profit or a field of interest.
- ▶ Donate a portion of the *profit from a farm*, equipment, grain or land sale.
- ▶ Give *anonymously*.



► Make a *planned gift* --through your will, a charitable trust, or a charitable gift annuity--to support a thriving, healthy community for years to come. The Caring Community Foundation accepts a wide variety of gifts including:

- Cash
- Publicly traded securities
- Closely-held and pre-IPO stock
- IRAs
- Life insurance with the Community Foundation as owner and/or beneficiary
- Remainder of a Charitable Remainder Trust
- Remainder of a Pooled Income Fund
- Lead gift of a Charitable Lead Trust
- Real estate

“We make a living by what we get.
We make a life by what we give.”

- WINSTON CHURCHILL



THANK YOU!

We are grateful for the generosity, trust and vision of our donors.

We are committed to working in partnership with you to open doors and build sustainability for a stronger future.

We are passionate and honored to continue to serve our communities!

*The Board of Directors and Staff of the
Caring Community Foundation*



CARING COMMUNITY FOUNDATION

a public charity 501(c)(3) serving NE Kansas

307 Leonard St., P.O. Box 54, Onaga, KS 66521

ccfks.org