

2011-2012  
25th  
anniversary  
year

# evanston!communityfoundation

**You bring**

- + ideas
- + energy
- + vision

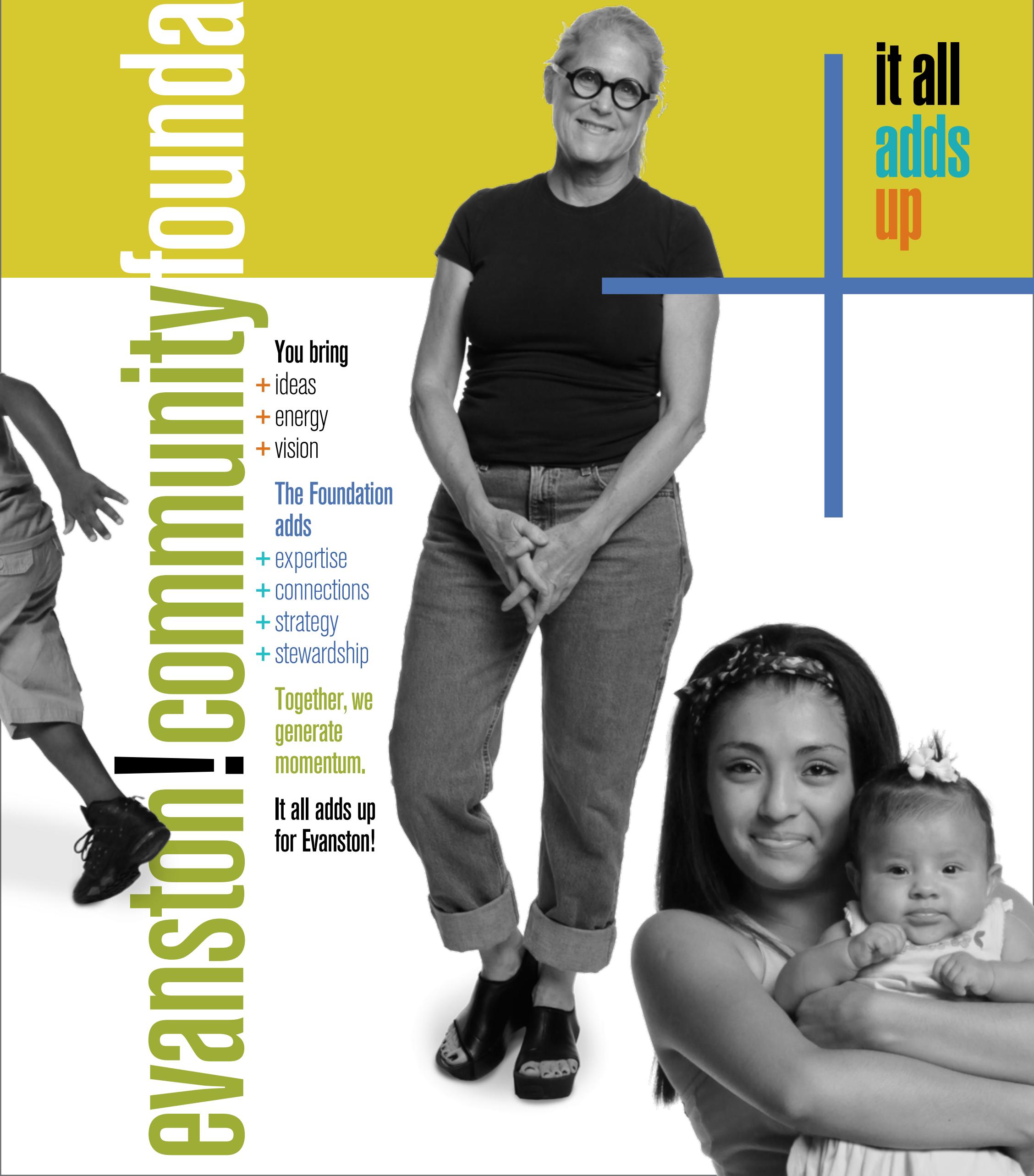
**The Foundation  
adds**

- + expertise
- + connections
- + strategy
- + stewardship

**Together, we  
generate  
momentum.**

**It all adds up  
for Evanston!**

**it all  
adds  
up**



# added value

## We start with what you bring—and build from there.

Our community is alive with people who care enough to want all children to be ready for kindergarten, to be engaged in community life as they grow up, to leave high school ready for the next round of education or postsecondary training, and to live full lives regardless of disadvantage or disability. Evanston residents contribute generously of their time, ideas, and resources because they know that we are connected across the lines that appear to divide us.

We're here to build, connect, and distribute increasing resources to bring those visions to reality and help our community thrive.

We're still best known for distributing grants to community organizations, and despite difficult times, we continue to do more each year. Charitable distributions for 2012 exceed \$800,000.

## The value we create

As we look to our 30th anniversary in 2016, we want the Foundation to be as well known for the value we create as for the grants we make.

Truth is, ECF convenes and participates in hundreds of conversations, encouraging individuals and organizations alike to forge connections to pursue their goals. Every day we field inquiries, make introductions, help other boards, advise other staffs so that nonprofit organizations, residents, and businesses can do more—and do it better. What difference does this make? We hope the stories and numbers in this report suggest how it all adds up.

As 2012 winds toward a close, we invite your continuing support.

*Penelope Sachs*

*Sara Schastok*

Penelope Sachs, Board Chair  
Sara Schastok, President and CEO

grants 7  
funds 9  
financials 10  
donors 12  
leadership 16



## You bring energy and ideas

“When you get a Foundation grant of \$10,000, it's more like a grant of \$50,000 because of all that comes with it,” said one grantee.

We support nonprofit organizations *and* we provide training to individuals to inform their engagement with local boards, commissions, and nonprofit groups. No other group does that—it all adds up to more for Evanston!

# and growth

## and foresight

## We're challenging organizations to look to their futures.

Growing over time, endowments are the heart of ECF—and a distinctive value added. Why not celebrate our 25th anniversary by stimulating other nonprofits to invest in their futures?

Our *ENDOW Now* program offers \$5,000 matching grants to groups that muster at least \$15,000 to set up their own endowments at ECF. So far three groups have signed up—North Shore Village, Youth Job Center, and Evanston 4th of July Association—each committing to build a fund over time that will return a new steady stream of support.

The challenge grant strategy also underlies *Partners for the Future*, an initiative funded and advised by an anonymous donor. The Foundation selects one organization each year that's ready for the big challenge of motivating its supporters to increase their giving. The YWCA Evanston/North Shore met its \$50,000 match in 2012, and Connections for the Homeless is now completing its effort to match \$100,000.



Tracy Alden, Evanston  
4th of July Association,  
left, and Helen Gagel,  
North Shore Village



## and a network

### We celebrated our anniversary by honoring Evanston's terrific nonprofits.

Helping Evanston thrive for 25 years and counting! We rely on a network of exceptional organizations to fulfill our goals. To celebrate our anniversary and what our community has accomplished since 1986, we wanted to recognize organizations that have made important contributions with Foundation grants. In early 2012, we surprised the boards of 25 organizations with award checks of \$1,000.



clockwise from top:  
Family Focus Our Place  
YWCA Evanston / North Shore  
Warren W. Cherry Preschool  
Open Studio Project  
Center for Independent Futures



### 25th anniversary awardees

Center for Independent Futures  
Warren W. Cherry Preschool  
Child Care Center of Evanston  
Childcare Network of Evanston  
Connections for the Homeless  
Evanston Coalition for Latino Resources  
Evanston Public Library  
Evanston Rebuilding Warehouse  
FAAM  
Family Focus Our Place  
The Family Room  
Grandmother Park Initiative  
Housing Options for the Mentally Ill  
Interfaith Action of Evanston  
Infant Welfare Society of Evanston  
The James B. Moran Center for Youth Advocacy  
The Musical Offering  
Open Studio Project  
PEER Services  
Piccolo Theatre  
SASI: Services for Adults Staying in Their Homes  
Shorefront  
Youth Job Center of Evanston  
Y.O.U.: Youth Organizations Umbrella  
YWCA Evanston/North Shore

## + and partnership

### NU students partner with us to give back to Evanston.

Northwestern students dance their way to a big impact in Evanston. As secondary beneficiary of NU Dance Marathon since 1998, the Foundation serves as DM's "feet on the street"—our knowledge of local needs helps turn their massive fundraising to great results. The partnership has funneled more than \$80,000 into our community this year, and \$648,000 since the beginning. And the beat goes on! Dance Marathon 2013 is March 8–10.

## and connections

### We're helping youth agencies join forces to expand kids' horizons.

Interacting with strong, caring adults is an important way that kids learn to be strong, caring adults themselves. Organizations like Y.O.U. and Big Brothers Big Sisters (BBBS) have recognized this by creating mentorship programs to link young people to adults in the community. But the need remains great, especially for kids in single-parent families (about 22% of Evanston children).

Expanding mentorship opportunities could involve not working harder, but working together, smarter. That was the insight of the youth agencies and concerned individuals who participate in All Our Sons, an ECF initiative launched by Jennie Berkson and David Edelstein to help boys navigate the challenges of growing up. "Each group that provides mentors was doing recruiting, each group was doing training — doing the same things over and over," says Edelstein. Now, through an ECF grant to a collaboration called Evanston Mentors, youth organizations are exploring ways to coordinate their efforts, starting with an online directory to publicize mentorship opportunities. A major goal is to hold joint recruitment events to raise awareness about the importance of adults stepping up for kids and the wealth of opportunities in Evanston to do so.

Adults like Aaron Salsbury, a marketing executive in food service, who has paired up with 8-year-old Omari Roberts through BBBS for everything from Cubs games and football to occasional homework help. Or Gary Arnold, a Skokie resident who "was looking for a way I could make a difference in somebody's life and expand my own horizons as well." Through Y.O.U. he connected with 14-year-old ETHS freshman Jonathon Connerly-Bey. Given their shared interest in food, the two go out to dinner together once a month and rate the restaurants using a scorecard Jonathon created. Becoming a restaurant critic wasn't exactly what he expected, says Jonathon, but he's enjoying it, along with the chance to talk about what's going on in his life.

"When boys have somebody in their lives showing concern for how they're doing academically and overall in life, they do better" says Edelstein. Evanston Mentors is working to make those connections.

Big Brother Aaron Salsbury  
with Little Brother  
Omari Roberts







Idea Team volunteer leaders Pam James, left, of “Water, Water Everywhere” and Cynthia Kasper of “Edible Evanston”

# + and resources

## We distribute philanthropic dollars.

The Foundation's 76 funds hold resources for many different purposes. Whether supporting the Foundation's grantmaking or operations, financing the initiatives of other organizations, or meeting donors' interests, ECF makes things happen.

## By nurturing the visionaries we help lead Evanston where it wants to go.

Just as ECF's big anniversary year ends, an even bigger one begins: Evanston's 150th Anniversary. We knew this celebration should be about more than fireworks and fun. So we joined with others to plan and launch Evanston150: a broad community visioning process to find our best shared ideas for Evanston's future.

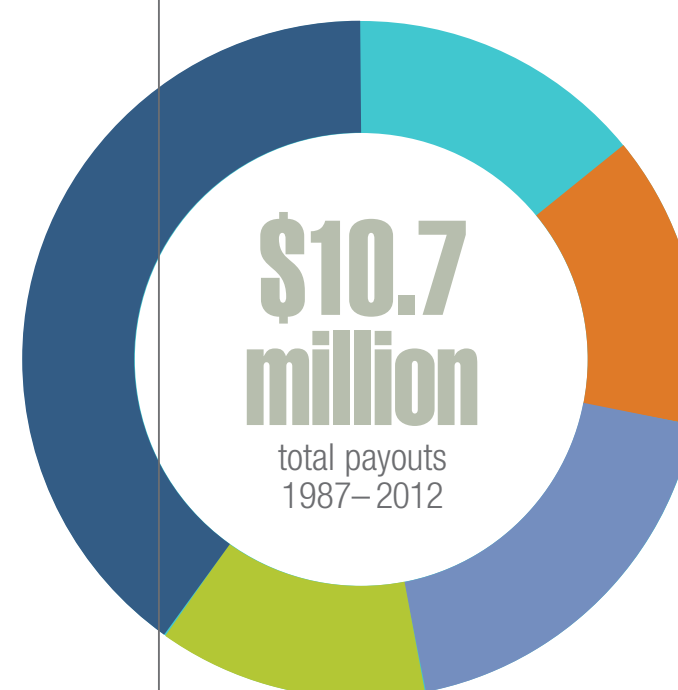
Ten terrific ideas emerged (check them out at Evanston150.org) to improve our physical and environmental health, expand opportunities for young people, and add things we can all enjoy, like vibrant public spaces and free wi-fi. The ten included two ideas we've been investing in since 2007, based on community input: preparing kids for kindergarten and training young people for work.

The ECF board stands ready to manage funds to advance the ten ideas, consider grant proposals, and foster collaborations among idea teams and existing institutions and organizations.

Foundation staff remain engaged to help the ten “idea teams” transform vision into action. We're offering them the kind of capacity-building that we provide through Leadership Evanston and *root2fruit*: community organizing, leadership skills, identifying community assets, and getting the right people at the table.

**Already there are signs of progress.** A pilot project involving the YMCA, YWCA, District 65 and Northwestern volunteers offers second graders at Oakton, Dawes, and Washington schools free swimming lessons — one of the ideas that bubbled up in “Water Water Everywhere.” And a new community health center (envisioned in “Here's to Our Health”) is coming, thanks to a \$650,000 federal grant to Chicago's Erie Family Health Center. Here's to more visions becoming reality!

# + and encouragement



## total charitable payouts by distribution type

40.0%	competitive and strategic grants
14.2%	donor advised fund grants
13.8%	endowment draws for operations
19.4%	Illinois Early Childhood Fellowship
12.6%	scholarships, designated organization distributions, and other

# + and momentum

## More families, more partners, more possibilities for 'Every Child'.

*Every child ready for kindergarten, Every youth ready for work:* that's the long-term vision we've been pursuing since 2007. We started with a plan: focus on the youngest children and build impact over time. Our funding has enabled local agencies to provide birth-to-three home visiting for fifty more families at a time, along with professional development for home visitors and collaborations among professionals. As the children (and as our Communityworks endowment) grow, we've been adding components: more early literacy, parent drop-in centers, scholarships for preschool. We've also been working steadily with others in the community committed to early learning.

That collaboration reached a high point in 2011, when we joined Northwestern, District 65, local childcare centers, the city, and other local foundations to support Evanston's inclusion in a federally funded study of how young children

benefit from Child-Parent Centers, a longstanding model for improving educational outcomes.

“Getting the major players in town to collaborate is always tricky,” says Charles Lewis, an education activist whose family foundation has supported Communityworks and contributed to matching funds required for the study (part of an extraordinary \$450,000 raised here). “All the leading players have been working in a very collaborative way, all focused on kids between preschool and third grade.”

As momentum builds, other local funders offer support, and our *Every child* network implements new ideas. One foundation is working through ECF to extend home visiting for 20 children ages 3-5. Another wanted to enhance pre-K literacy, and asked the Foundation to develop a high-impact plan. We brought together several potential partners, and the result was ABC Boosters. This summer program had Evanston Public Library training teens recruited by Youth Job Center to work one-on-one with preschoolers at Fleetwood-Jourdain and Robert Crown Centers, reading books and playing games to boost letter recognition. “I didn't think that kids would really respond to learning during the summer time,” said one teen. “[But] I see that the kids really love this. Secretly, kids at any age love being read to, even when they can read. It's a pretty amazing thing to see.”

The teens themselves got a lesson in responsibility, says program co-director Maria Torres, a kindergarten teacher at Dawes. They helped the little ones get ready for kindergarten — and “more important,

taught them to engage and enjoy books.”

It's no surprise that improving early learning emerged as one of Evanston150's top ten ideas in (see story on page 5)— more evidence that our community's efforts on behalf of our youngest citizens are reaching a critical mass.

since 2007	families reached by home visiting
486	families who stayed with the program
67%	kids screened for developmental problems
371	





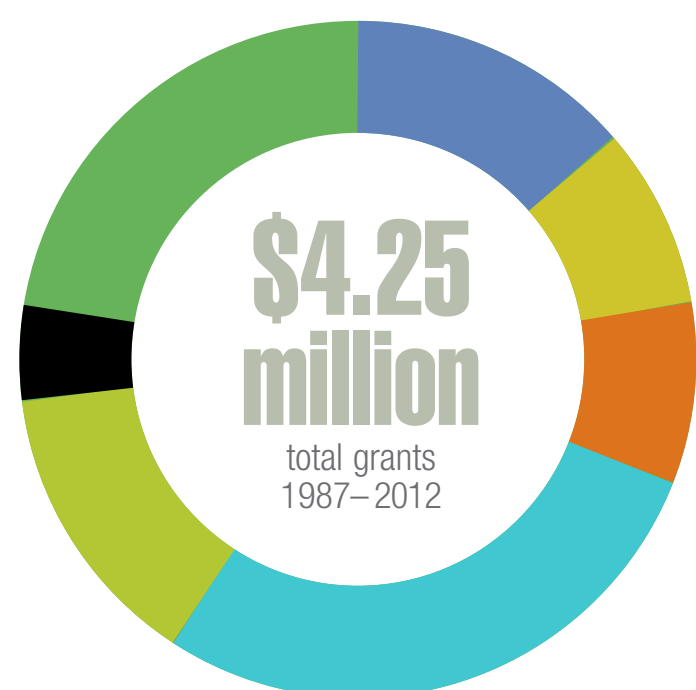
and  
**a wide net**

## Wide-ranging, far-reaching.

The Evanston Community Foundation's grantmaking reaches many corners of Evanston. We support organizations poised for healthy growth—helping them transform to serve more people, more effectively. We look for projects that will support people on paths to better futures. Making the Foundation—our general endowment or our annual fund—a priority in your charitable giving strengthens Evanston's entire fabric.

Targeted funds (page 9) give you the option to focus your support in specific areas.

## competitive and strategic grants



- 13.5%** the arts
- 8.7%** basic human needs
- 8.6%** community development
- 28.3%** early childhood education
- 13.9%** family support and counseling
- 4.3%** housing
- 22.7%** youth and education

## Grants change lives.

Thanks to our recent support of The Harbour, the shelter and counseling organization for young women in crisis could be there when Tressann Minzit needed it. Now she's working in Evanston, paying the rent, and going to college.

and  
**a life-line**

## 2011 / 12 total grants and distributions: \$1,862,812

and  
**impact**

## 2012 competitive and strategic grants: \$560,698

### communityworks

Every child ready for kindergarten, Every youth ready for work: \$219,208 in strategic grants

Home Visiting Support Services and Enrichment Activities for Ages 0-3  
Infant Welfare Society of Evanston \$ 83,301

Baby Talk

Evanston/Skokie District 65 Family Center 43,185

Parents as Teachers

Evanston Public Library 1,850

Professional development for early childhood workers

Childcare Network of Evanston 3,500

Early childhood systems development

Home Visit Collaboration, Leadership and Evaluation 26,372

New Home Visiting for Ages 3-5

Infant Welfare Society of Evanston 11,500

Evanston/Skokie District 65 Family Center 11,500

Infant Mental Health Consultancy

Infant Welfare Society of Evanston 6,500

Evanston/Skokie District 65 Family Center 5,000

Preschool: Bridge to Kindergarten

Warren W. Cherry Preschool 6,500

ABC Boosters

Evanston Public Library 11,000

Youth Job Center 9,000

responsive grants

responding to community need, building community assets: \$214,490 to 30 organizations

We are grateful to all our Grantmaking Partners, particularly Dance Marathon, for their gifts that allowed us to fund all grants listed below. See page 15 for our full list of partners. The following board-directed Funds at the Foundation also support these grants:

All Our Sons Fund

Arts in Community Fund

George Cyrus Memorial Fund

Natasha S. Deutsch Fund

Evanston Realtors Fund

The Fund for Evanston

Green Communities Fund

Lydia Martin Memorial Fund for Children and the Arts

Lorraine Hairston Morton Fund for Youth

Rees-Servillo Jan Heffernan Memorial Dinner Fund

Sweeters Fund for Children and the Arts

Faith Vilas Fund for Youth

Fund for Women and Girls

Barr-Harris Children's Grief Center \$ 7,500

Evanston Grief Center for Low-Income Families

Big Brothers Big Sisters of Metropolitan Chicago 7,500

Evanston Community-Based Mentoring Program

Center for Independent Futures 13,000

Train the Trainer Program at ETHS

Changing Worlds 7,500

Arts, Cultural and Literacy Connections

Warren W. Cherry Preschool 9,100

Sustaining Quality Pre-School for At-Risk Children

Childcare Network of Evanston 8,280

Communitywide Child Care Scholarship

Children's Advocacy Center of North and Northwest Cook County 7,500

Counseling for Child Victims of Sexual Abuse

Communityworks: Supplemental for Every Child Ready for Kindergarten Every Youth Ready for Work\* 5,000

\*Funds were distributed to partner organizations through our Communityworks grants listed above.

Connections for the Homeless Project 20 13,000

Curt's Café 5,000

Job and Life Skills Training for Young Ex-Offenders and At-Risk Youth

Edible Evanston 4,850

(volunteer organization of Evanston150) Carlson Greenhouse Renewal

Evanston Art Center \$ 7,000

Building Relocation

Evanston History Center 5,000

150th Anniversary Project Coordinator

Evanston Mentors Collaboration 6,000

Expansion of Evanston Mentoring Programs

Evanston School Children's Clothing Association 3,000

Purchase Children's Underwear and Socks

Evanston/Skokie School District 65 8,000

21st Century Community Learning Centers

Enrichment Opportunities for At-Risk Youth

Evanston/Skokie School District 65 Lake Dance 5,260

LakeDance Science Curriculum Using Dance as a Teaching Tool

Family Focus 9,000

Child Connections Parenting Workshops and Coaching

Family Promise Chicago North Shore 8,000

Part-time Case Manager

Grandmother Park Initiative 6,000

Community Outreach

The Harbour, Inc. 5,000

Safe Harbour Emergency Shelter

Infant Welfare Society of Evanston 7,000

Music & Movement Teacher Professional Development

McGaw YMCA 10,000

Pioneering Healthier Communities

James B. Moran Center for Youth Advocacy 6,000

Partnership for Peace

Rebuilding Together North Suburban Chicago 5,000

Home Repair Services

Shorefront 4,000

Legacy Keepers

Theatre and Interpretation Center 7,000

at Northwestern University

Co-production of "The Exonerated" with Next Theatre

Youth Job Center 7,500

WILL: Women Invested in Learning and Livelihoods

Y.O.U. (Youth Organizations Umbrella) 10,000

Caring Adult Connections

YWCA Evanston/North Shore 7,500

Legal Advocacy Program

root2fruit

capacity building grants for small organizations: \$80,000

Evanston Day Nursery / year 2 \$ 10,000

Evanston Rebuilding Warehouse / year 2 10,000

Evanston Scholars / year 1 10,000

Infant Welfare Society of Evanston / year 3 10,000

Mudlark Theatre Company / year 1 10,000

Piccolo Theatre, Inc. / year 2 10,000

(formerly Evanston Festival Theatre, Inc.)

Next Theatre Company / year 1 10,000

The Talking Farm / year 2 10,000

root2fruit alumni grants: \$12,000

Center for Independent Futures \$ 3,000

The Lilac Tree 3,000

The Musical Offering 1,000

Open Studio Project 3,000

The Recyclery 2,000

25th anniversary awards

surprise grants to 25 Evanston organizations in celebration of our 25th Anniversary: \$25,000. See list on page 2.

endow now

endowment building challenge grants: \$15,000

Evanston Fourth of July Association (pending) \$ 5,000

North Shore Village 5,000

Youth Job Center (pending) 5,000

2012 foundation initiatives

programs & operations: \$163,325

support from:

Mr. and Mrs. Carlye Anderson Fund

Communityworks Fund

Natasha S. Deutsch Fund

Don and Martha Farley Fund

Fund for Evanston

Foundation Fund

Jim Kogen Foundation Spirit Fund

Gene Lavengood Fund

Leadership Fund

other initiatives: \$815,940

Evanston150 \$ 98,066

The Foundation is fiscal sponsor for this grassroots community collaboration.

I3 Grant to University of Minnesota 10,000

To match federal grant for Parent-Child Centers Research Project.

Illinois Early Childhood Fellowship 707,874

The Foundation is fiscal sponsor for this special project to advance leadership development in the early childhood field.

See page 15 for the list of corporate and private foundation funders.

## donor-advised funds 2011 grants: \$254,338

Grants recommended by donor advisors and approved by the Foundation board

## grants to Evanston area service organizations: \$178,752

Childcare Center of Evanston	\$ 1,000
Connections for the Homeless	7,050
Evanston Community Foundation (ECF)	12,900
ECF Grantmaking Partners Program	44,202
ECF Leadership Evanston	1,500
Evanston Community Development Corporation	1,500
Evanston 4th of July Association	1,000
Evanston Public Library	5,100
The Family Room	1,800
Housing Options for the Mentally Ill	500
Interfaith Action of Evanston	1,000
Jewish Reconstructionist Congregation	1,250
Keep Evanston Beautiful, Inc.	1,000
Literature for All of Us	1,800
McGaw YMCA	12,000
Mitchell Museum of the American Indian	500
James B. Moran Center for Youth Advocacy	10,000
Music Institute of Chicago	8,000
Next Theatre Company	5,500
Northwestern University Bienen School of Music	2,000
Open Studio Project	1,800
Percolator Films	750
Roycemore School	1,000
St. Athanasius Roman Catholic Church	3,000
Second Baptist Church	250
The Talking Farm	10,000
Y.O.U. (Youth Organizations Umbrella)	1,250
Youth Job Center of Evanston Inc.	1,000
YWCA Evanston/North Shore	40,100

## grants to metropolitan Chicago organizations: \$24,800

## grants to organizations outside our area: \$50,786

## 2012 distributions from designated funds

### awards, grants & scholarships: \$19,820

Acorn Fund	\$ 1,000
grant to Ladd Arboretum for Prairie Plant Plot	
Beatty Family Scholarships at ETHS: 3 scholarships	3,000
Virginia L. and Wm. K. Beatty Fund	1,320
award to Medical Library Association	
William K. Beatty Medical History Fund	1,000
award to Galter Library at Northwestern	
Chicago Urban Youth Scholarship Fund: 8 scholarships	10,000
Fisher Fund for Nursing Education	750
grant to Lake Forest Hospital	
Bruce E. Mitchell Short Story Award at ETHS 3 awards	1,000
Norman W. Thomas, Jr. Scholarship at ETHS 1 scholarship	750
Rose and Andy Thomas Scholarship at ETHS 1 scholarship	1,000

### grants to designated agencies: \$48,891

Center for Independent Futures	\$ 533
Citizens Lighthouse Community Land Trust	544
Evanston Environmental Association for Environmental Education	13,670
Evanston Police and Fire Fund	3,000
ETHS Educational Foundation	
Margaret Gunn Scholarship	12,000
Barry Zwick Football Scholarship	5,000
Foster Reading Center Programs	
Roving Reader program at Child Care Center of Evanston	611
Foster Reading Center program at McGaw YMCA	2,445
McGaw YMCA for Project SOAR	663
Skokie Community Fund for Skokie Community Giving Program	10,225



Continuing our commitment. “Leaving a gift to the Evanston Community Foundation is a great way for us to continue our commitment to this community after we’re gone. We are confident that what we leave will be well-managed and -spent, in areas of need that are important to us now and in ones that we can’t yet foresee.” —Kirk Hoopingarner



Kim and Kirk Hoopingarner

and  
a plan

## Pastor’s fund supports effort to give young ex-offenders a second chance.

Rev. Richard Mosley of Hemenway United Methodist Church nurtures a passion for restorative justice that heals victims and perpetrators, families and communities. Determined to pursue that vision for Evanston, he turned to us. We helped him set up an endowed fund to benefit Curt’s Café, the restaurant started by Susan Trieschmann that hires young ex-offenders, giving them a chance to learn job skills and build a resume. “Young people who have served their time, when they come back to Evanston, should know that they have choices, and that there’s a place of hope and encouragement,” says Rev. Mosley. “I believe that Curt’s Café is the first step to make this vision a reality.” The endowment at the Foundation will help sustain that vision.

Rev. Richard Mosley  
Hemenway United Methodist Church

## daniel burnham society

The Pillars of Evanston

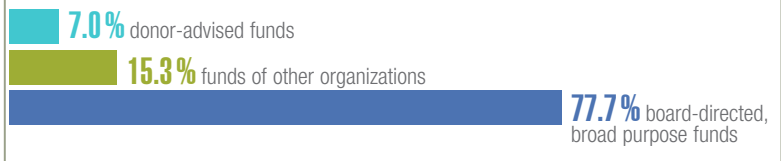
Anonymous (2)  
Elizabeth and Carlyle Anderson\*  
John and Carol Balkcom  
Virginia L. Beatty  
Diane and Karl Berolzheimer  
Lester and LaShawn Blair  
Mary Anne and Joe Cappo  
Julie Captain  
Julie and Josh Chernoff  
Christina and David Cugell  
Natalasha Deutsch\*  
Martha and Donald Farley  
William Friedlander  
Kendal and Ken Gladish  
Joan and Guy Gunzberg  
Kim and Kirk Hoopingarner  
Judy and Bob Kemp  
Ronna Stamm and Paul Lehman  
Margaret and Paul Lurie  
Bonnie and Jay Lytle  
Susan Manning and Doug Doetsch  
Kathy Miller

Betty A. Papangelis  
Claudette Rasmussen  
Eleanor and William Revelle  
Elizabeth and James Roghair  
Penelope and Toby Sachs  
Sara Schastok  
Ralph Segall  
Ann B. Stevens  
Carolyn J. Sweers  
Edna and Larry Ter Molen  
Faith Vilas\*  
Barbara Goodman and Seth Weinberger  
Linda and Payson Wild  
Marge and John Wold  
Sidney Zwick  
\*deceased

These individuals have pledged to include the Evanston Community Foundation in their estate plans, or have established lifetime planned gifts. Contact [burnham@evanstonforever.org](mailto:burnham@evanstonforever.org) to discuss your plan!

## funds of the foundation

### foundation endowments by fund type



### annual fund

Supports the full range of current grants and activities

### funds for foundation initiatives

**Evanston150 Project**  
Community-wide initiative that engages all of Evanston in imagining the future, resulting in 10 visionary ideas to celebrate Evanston’s 150th anniversary in 2013.

**Evanston Climate Action Fund**  
Funds grants for greenhouse gas emission-reduction projects to help Evanston meet the goals of its Climate Action Plan

**Evanston Women’s History Project**  
Documents Evanston women’s stories and history sites, and provides public access to this history through tourism materials, educational curriculum and leadership programs

**Grantmaking Partners**  
Supplements funds for spring responsive grantmaking. Please see page 15 for a list of grantmaking partners, including Dance Marathon at Northwestern University

**Illinois Early Childhood Fellowship Fund**  
Advances leadership development in the field of early childhood care and education. This is a special project funded by corporate and private foundation grants; ECF is a fiscal sponsor

## board-directed broad purpose funds

**Acorn Fund**  
Encourages activities to test new ideas of value to our community

**All Our Sons**  
Supports boys and young men as they strive to become responsible members of the community

**Arts in Community Fund**  
Strengthens Evanston as an extraordinary arts community

**Balkcom Family Fund**  
Promotes literacy and affordable housing

**Communityworks Fund**  
Identifies and supports systematic approaches to strengthen Evanston in areas of early childhood care and education, land use, and workforce training and development; includes:  
**Pearl & Sander Davis Fund for Communityworks**

**Cultural Diversity Initiative**  
Fosters understanding among ethnic and racial groups within early childhood education

**Evanston Realtors Fund**  
Increases annual grant awards — a fund initiated by real estate professionals; with contributing funds from:  
**George Cyrus Memorial Fund**

**Leonard Fisher Fund for Nursing Education**  
Funds continuing education for ICU nurses at Highland Park and Lake Forest Hospitals

**Foundation Fund**  
Provides for the Foundation’s infrastructure — our own endowment; includes:  
**Jim Kogen Foundation Spirit Fund**  
**Gene Lavengood Fund**

**Fund for Evanston**  
Meets community needs as they change over time through Foundation grants and programs — the original fund of the Foundation; with contributing funds from:  
**Mr. and Mrs. Carlyle Anderson Fund**  
**Natalasha S. Deutsch Fund NEW**  
**Evanston United Way Fund**  
**Martha and Don Farley Fund**  
**Rees-Servillo/Jan Heffernan Memorial Dinner Fund**

**Fund for Women & Girls**  
Supports grants and community education to empower women and girls

**Green Communities Fund**  
Encourages area residents to focus attention on environmental protection, greenhouse gas reduction, resource conservation, and energy efficiency

**Leadership Fund**  
Develops individuals’ leadership skills in diverse groups through exploration of Evanston assets and challenges; includes:  
**Leadership Chairs Challenge NEW**  
**Marybeth Schroeder Fund for Leadership**

**Lydia Martin Memorial Fund for Children and the Arts**  
Funds hands-on arts education programs that benefit disadvantaged children and youth

**Lorraine Hairston Morton Fund for Youth**  
Supports organizations and projects to increase employment and educational opportunities for Evanston youth

**Skokie Community Fund**  
Resource for the betterment and welfare of Skokie residents

**Sweers Fund for Children and the Arts**  
Supports arts education for Evanston youth in grades 6 through 12

**Faith Vilas Fund for Youth**  
Provides for programs serving youth

### organizational endowments

**Center for Independent Futures Fund**  
Forms innovative partnerships to create product and service models that give adults with disabilities and their families the skills and opportunities to realize a full life

**Chessmen Legacy Fund**  
Established in memory of Morris Barefield and Charles Thomas to support Evanston youth and elderly

**ETHS Educational Foundation Fund**  
Distributes funds to Evanston Township High School in order to complement, enhance and enrich, beyond the means of conventional public funding, opportunities that further the educational mission of ETHS  
**Margaret Gunn Scholarship Endowment at ETHS**  
Annual awards in memory of Margaret Gunn, class of 1945  
**Joseph and Linnie Lee Moragne Memorial Scholarship Fund**  
Annual awards for African-American ETHS graduates demonstrating high achievement and leadership  
**Unterman Fund for ETHS**  
Supports the educational experience of needy students of good character and academic ability  
**Barry Zwick Football Scholarship Fund**  
Annual scholarship award for at least one graduating senior who participated in the football program

**Evanston Environmental Education Fund**  
Advances environmental awareness and promotes environmental stewardship in Evanston

**Evanston Fourth of July Association Fund NEW**  
Supports family-oriented entertainment events on the 4th of July and throughout the summer

**Evanston Symphony Orchestra Association Fund**  
Delivers quality, affordable, accessible classical music to the community

**Grady Bird Sanctuary Fund for the Evanston Environmental Association**  
Supports repair and maintenance of the Association’s bird sanctuary

**Literature for All of Us Fund**  
Encourages literature appreciation in youth

**North Shore Village Endowment Fund NEW**  
Benefits a network of services enabling seniors to live independently in their homes as vital members of the community

**Roycemore School Endowment Fund**  
Provides support for faculty and program-related projects  
**Eisner Endowment for Roycemore School**

**Youth Job Center Endowed Fund NEW**  
Supports employment-related services for disadvantaged and at-risk youth

### donor-designated funds

**Virginia L. and William K. Beatty Volunteer Service Award**  
Recognizes a medical librarian who has demonstrated service to the Medical Library Association and the health sciences library profession

**Beatty Family Scholarship Fund**  
Provides assistance to three college-bound ETHS graduates with interest and achievement in the areas of foreign language, journalism or writing, and science, honoring the children of Virginia L. and William K. Beatty: Carol, Margaret and William B.K. Beatty

**William K. Beatty Medical History Prize**  
Honors outstanding research in the field of medical history

**Chicago Urban Youth Scholarship Fund**  
Provides tuition assistance to students in programs of Midtown Educational Foundation, Chicago

**Citizens Lighthouse Community Land Trust Fund**  
Supports long-term affordable housing for low- to moderate-income people in Evanston

**Fund for Curt’s Café NEW**  
Applies principles of restorative justice to develop work and life skills in young ex-offenders.

**Evanston Police and Fire Fund NEW**  
Increases the net resources available for the men and women devoted to the safety of our community

**Foster Reading Center Fund**  
Supports this after-school program to increase reading skills and provide readers in home daycare settings

**Susan Willis Heiberger Memorial Garden Fund**  
Maintains the Heiberger memorial garden at ETHS

**Rayna and Marvin Miller Fund for Interfaith Housing Center of the Northern Suburbs**  
Advocates for fair and affordable housing

**Bruce E. Mitchell Short Story Fund**  
Provides annual awards recognizing outstanding short stories by ETHS juniors.

**Chuck Remen Memorial Fund**  
Benefits Project SOAR at the McGaw YMCA

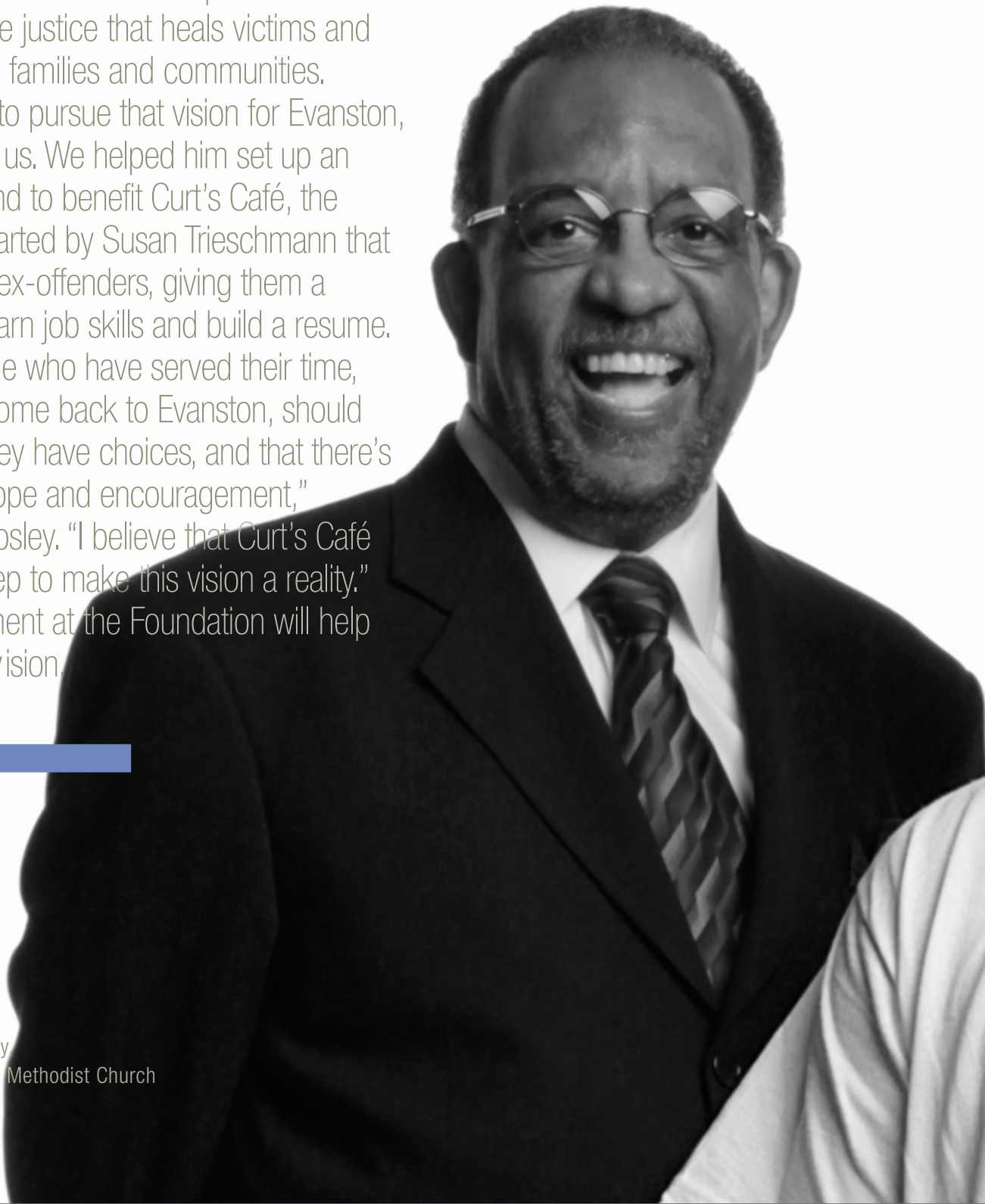
**Norman W. Thomas Jr. Scholarship Fund**  
Provides college or technical school scholarship assistance to a graduating ETHS senior

**Rose and Andy Thomas Educational Fund**  
Provides scholarship assistance to a graduating ETHS senior who is a first or second generation resident of the USA and/ or has an interest in international travel and studies; supports early childhood education and anti-hunger initiatives

### donor-advised funds

Allows donors to recommend grants; similar to, but more economical than a private foundation, and easier to establish  
**ABS Fund**  
**B & J Fund**  
**Edelstein-Berkson Family Fund**  
**Sally and Richard Ennis Fund**  
**Friends of the Arts Fund**  
**Goodman/Weinberger Fund**  
**Jon Kimmel Memorial Fund**  
**Avi Kurganoff Memorial Fund NEW**  
**Lytle Family Fund**  
**Joe “Butch” Martin Fund**  
**Partners for the Future Fund**  
**Plumtree Fund NEW**  
**Mary Laffin Rockwell Fund**  
**Weisblat Family Fund**  
**Zunamon-Cunniiff Family Fund**

and  
hope



Baltazar Jacob Hernandez,  
Curt’s Café



# and stewardship

## summary of financial data

as of December 2011 and 2010, in thousands

Net Assets	2011	2010
Assets	\$ 15,159	\$ 14,207
Liabilities	( 1,813)	( 1,581)
Net assets	\$ 13,346	\$ 12,626

## Revenues

Contributions	\$ 2,767	\$ 2,355
Program revenues	80	81
Investment results	(14)	1,392
Total revenues	\$ 2,833	\$ 3,828

## Expenses

Program services, including grants	\$ 1,817	\$ 1,721
Management and general	174	141
Fundraising	122	121
Total expenses	\$ 2,113	\$ 1,983

## Increase in Net Assets

Revenues in excess of expenses	\$ 720	\$ 1,845
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Audited financial statements and Form 990 are available for review at the Foundation office.

## 2011/12 financial highlights

The Foundation received nearly \$2.8 million in gifts and grants in 2011, including \$750,000 in matching funds from the Grand Victoria Foundation as we completed the final phase of the Communityworks matching challenge in September 2011. At December 31, 2011, Foundation assets were nearly \$15.2 million.

In 2011 investment results did not contribute substantially to our asset base, thus our net assets increased just \$720,000 in 2011 compared to an increase of \$1,845,000 in 2010. Liabilities consist primarily of the funds we hold as agency endowments; the increase in liabilities is due to gifts added to those funds in 2011.

## 2011 results and report of the investment committee

We will recall 2011 as the first time in 18 years in which the portfolio's annual return (-0.28%) did not match up to at least two of our three primary investment return benchmarks. While ECF's portfolio outperformed the -2.0% median rate of return of our peer group in the Council on Foundations, the results fell short of ECF's spending target of 5.0% and of the blended benchmark return of 1.9%. The backdrop of a subpar domestic economic recovery, fiscal turmoil in Europe, and a slowing economy in China did not create a favorable environment for equity investing in 2011. Broadly speaking, there was a much smaller range between the best and worst stocks in 2011 than in many years. The markets, it seemed, did not discriminate much among individual stocks; they tended to move as one. That theme carried out to most other asset classes as well. Moves occurred in lockstep and were quite volatile, moving first up and then down (and vice versa) in sharp bursts of trading. It was, in short, a hard market in which to stand out. At the end of the year, our asset allocation remained within policy allocation ranges and broadly spread.

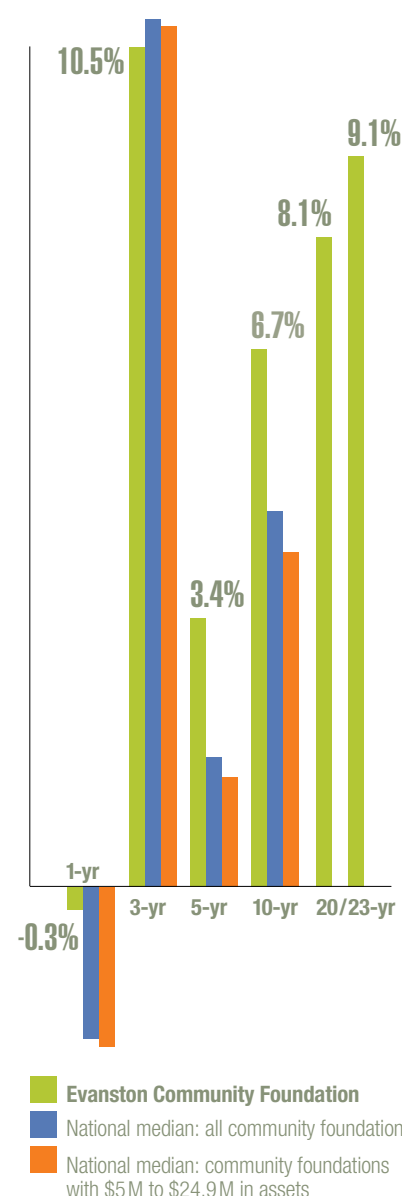
## 2012 investment performance

As the ongoing global debt liquidation cycle continues, central banks around the world have taken extreme steps to counter its deflationary impact, bringing interest rates for strong governments down to near zero. In response to the elixir of easy money, the financial markets have produced better returns than in 2011. The blended benchmark we use as a measure of the global market available to us rose 5.71% in the first six months of 2012, and the ECF portfolio has kept pace, rising 5.43%. Investors find themselves at a curious crossroads at mid-year 2012. With interest rates held down by policy makers, many investors are finding safe and sustainable sources of income elusive and are stretching in many cases to find investable opportunities. In our view, the markets are beginning to show signs of distorted valuation as a result of prolonged exposure to administered rate levels. Despite the stresses that are likely to continue for the next few years, we continue to believe that a return of 5% is attainable over the long run and have recommended a 5% spending level for 2013 to the Foundation's board. Our investment allocation at mid-year is defensive as we await opportunities to put money to work at attractive valuations.

\*The Foundation's Blended Benchmark is the weighted average of the market indices used by the investment committee to measure portfolio performance and includes the Wilshire 5000 Index, the MSCI-EFAE Index of international equities, the Barclays Capital Aggregate Bond Index, and the J. P. Morgan Global Bond Index.

## investment performance

average annual total return through December 31, 2011



## Evanston Community Foundation investment committee

**Ralph Segall, chair**  
Managing Director,  
Segall, Bryant & Hamill  
former Foundation chair

**Karl Berolzheimer**  
Retired Attorney and Bank Director  
former Foundation chair

**Bill Blanchard**  
Vice President,  
Private Banking USA  
Credit Suisse  
Foundation board member

**Diana Cohen**  
Community Volunteer  
Foundation board member

**William Goldstein**  
President,  
Chesley, Taft & Associates

**John McCarthy**  
Chief Investment Officer,  
Centaur Capital Partners  
Foundation treasurer

**Mark McCarville**  
Partner, Braydon Partners  
former Foundation board member

**Kevin Mott**  
Financial Advisor, Edward Jones  
Foundation board member

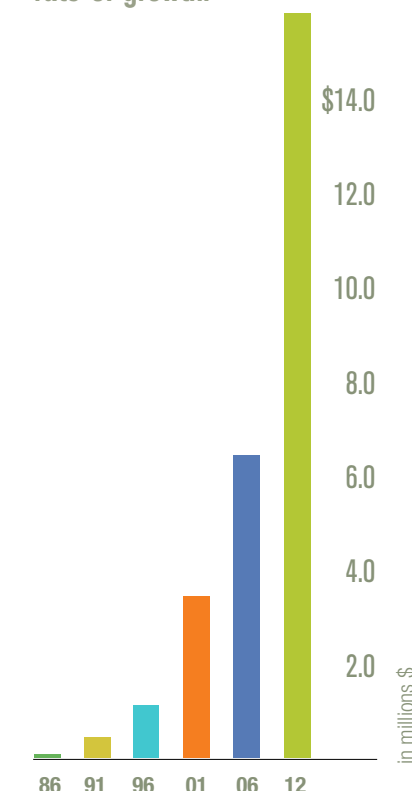
**Eric Robison**  
Vice President, Private Banker  
BMO Harris Private Bank  
Foundation board member

**Penelope Sachs**  
Community Volunteer  
Foundation chair

**Ingrid Stafford**  
Associate VP for Financial  
Operations and Treasurer,  
Northwestern University  
former Foundation board member

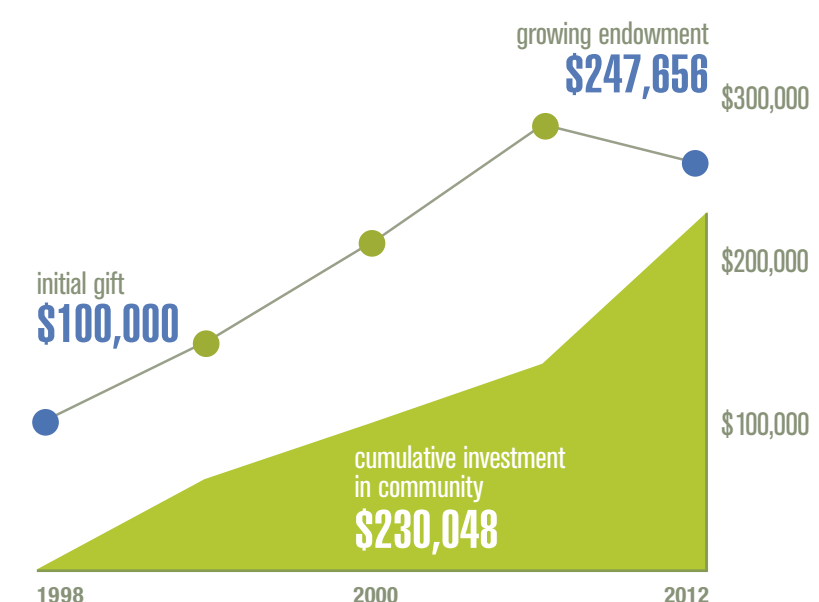
## 26 years of asset growth

Investment in the organization's infrastructure has made a difference in our rate of growth.



## a gift to the endowment gives AND grows

Based on actual results, a gift of \$100,000 in 1988 would have funded distributions more than twice the size of the original gift—and would also have left in place a fund that is substantially more than twice the size of the original gift.



# + and strategy

## Investing for the long term.

Bart Rocca has made a career in helping business leaders think strategically. A semi-retired management consultant and longtime Evanston resident, Rocca takes the same strategic approach to charitable contributions: he looks for long-term impact.

That's why he and his family made a major 2011 contribution to ECF's Communityworks fund (which helped us make the Grand Victoria Foundation match) and has now joined our advisory committee.

For starters, the focus on early childhood promises to pay off far into the future. "The first three years of life are tremendously important for cognitive development," says Rocca, "which is so important to be successful in life. Making sure children of less advantaged backgrounds get a reasonable start—that's very appealing. Then there's the purely financial aspect. Grand Victoria's matching grant let me double my money, and I'm all in favor of doubling my money! Plus with Communityworks you make a one-time donation, then the revenue generated by that endowment sustains the program for many years."

Rocca has been an active ECF supporter since the 1990s, both financially and through service with Leadership Evanston. "We're fortunate to have such a vibrant community foundation," he says. "Those are very valuable dollars that the foundation generates—they've been tremendously beneficial to the nonprofits I'm familiar with. I'm pleased that it's established a reasonable growth path in difficult economic times. It's nice to live someplace where there are so many efforts going on to strengthen the community."

Catherine and  
Bart Rocca



## leadership of the foundation

### foundation board of directors

Penelope Sachs, chair  
Judith Aiello-Fantus  
Lisa Altenbernd  
Lun Ye "Lonnie" Crim Barefield  
Bill Blanchard <sup>1</sup>  
Michael Brody, secretary  
Julie Captain  
Julie Chernoff  
Diana Cohen  
Marvin R. Cohen  
Mary Finnegan  
Joan Gunzberg, vice chair  
Burgwell Howard  
Judy Kemp, past chair  
Bill Logan  
Naomi Lovering <sup>1</sup>  
John McCarthy, treasurer  
Kevin Mott  
Anne Murdoch  
Richard Peach  
Kim Perutz <sup>3</sup>  
Eric Robison <sup>1</sup>  
Shabnum Sanghvi  
Keith Sarpolis  
Sandra Waller Shelton <sup>1</sup>  
Ronna Stamm, vice chair  
Hugh Williams <sup>2</sup>

<sup>1</sup> Joined in May 2012  
<sup>2</sup> Ended term in December 2011  
<sup>3</sup> Completed term in May 2012

### leadership network

John Balkcom  
Ann Mammel Balusek  
Karl Berolzheimer  
Mary Anne Cappo  
Paul J. Finnegan  
Joseph P. Flanagan  
Kendal Gladish  
William Goldstein  
Kirk Hoopingarner  
Ken Lehman  
Charles A. Lewis  
Jay Lytle  
Mark J. McCarville  
Lorraine H. Morton  
Eleanor Revelle  
Elizabeth Roghair  
Ralph Segall  
Ingrid Stafford  
Larry Ter Molen  
The Hon. Elizabeth Tisdahl

### alumni council

John Allen  
Frederic Artwick  
Carol Balkcom  
Sylvia Bateman  
Lester Blair  
William Breen  
Betty Brugger  
Bill Campbell  
John Chapman  
Compton Chase-Lansdale  
Joy Creamer  
Deb Danson  
Beth Davis  
James Davis  
Ken Davis  
Lorenzo Dawson  
Natasha Deutsch\*  
Rosanne Dimeen  
Jerry Donohue  
Sue Durburg  
Jeffrey Ernrich  
Betsy Engelman  
Maria Felcher  
William Friedlander  
Carolyn De Swarte Gifford  
Sandy Gross  
Joseph Hagee  
Carol Henes  
James Hoel  
Ernest Jacobi  
Judith Jobbitt  
Rose Johnson  
Stephanie Kaplan  
James Kauffman  
Esther Klatz  
James Kogen\*  
Sharon Komlofske  
Lucile Krasnow  
Iris Krieg  
Duanne Kulberg  
Maxine Lange

Lawrence Lavengood\*  
Kenneth Lehman  
Dolores Leone  
Marcia Lipetz  
Dorothy Lloyd Still  
Jay Lytle  
Susan Manning  
Claire McCarthy Peterson  
Mark McCarville  
Mark Miller  
John Morris  
Lynette Murphy  
Betty Papangelis  
Bob Parris  
Kim Perutz  
Michael Phillips\*  
Rodney Quainton  
John Rapisarda  
Elizabeth Roghair  
Richard Romano  
L. Dean Scane  
George Simon  
William Smith  
Stacy Sochacki  
Thomas Stonecipher  
James Suhr  
Thomas Terry  
Decature D. Tounsel, Sr.  
Thomas Valenti  
Edgar Vanneman  
Shirli Vanneman  
Ernest Vasseur  
Faith Vilas\*  
David Wagner  
Sarah Wagner  
Seth Weinberger  
Payson Wild  
Diane Williams  
Hugh Williams  
Jerry Williams  
Stephen Wilson  
Arnold Winfield  
Ray Winninger  
Arthur Winter

\*deceased

### community representatives on board and advisory committees

**25th Anniversary**  
Peter Braithwaite  
Colleen Chappelle  
Carolyn Dellutri  
Jane Grover  
Liz Krupkin  
Gretchen Livingstone  
Jane McCarthy  
Brian Miller  
Lynette Murphy  
Brooke Saucier  
Loyce Spells

**Audit**  
Ingrid Stafford

**Climate Action Advisory Committee**  
Susan Besson  
Ellen Galland  
Steve Perkins  
Eleanor Revelle

**Grantmaking**  
Kunal Joshi  
Reggie Ollie  
Scott Ritter

**Investment**  
Ralph Segall, chair  
Karl Berolzheimer  
William Goldstein  
Mark McCarville  
Ingrid Stafford

**Communityworks Initiative Committee**  
Joe Flanagan  
Jay Lytle  
Mark McCarville  
Peter Morris  
Susan Munro, consultant  
Bob Reece  
Bart Rocca  
Larry Singer  
Ingrid Stafford

**Leadership Evanston Steering Committee**  
Tom Altman  
Leslie Brown  
Vickie Burke <sup>2</sup>  
Bridget Calendo  
R.J. Coleman  
Tim Eberhart <sup>1</sup>  
Margaret Gergen  
Vidette Bullock Mixon  
Fr. Robert Oldershaw  
Monique Parsons  
Bart Rocca  
Rev. Warren Smith  
Cynthia Witherspoon  
Judy Witt

<sup>1</sup> Joined in June 2012  
<sup>2</sup> Completed term June 2012

**Leadership Evanston Advisory Committee**  
Paul Arntson  
Sue Brady  
Helen Gagel  
Carol Henes  
Delores Holmes  
Maxine Lange  
Jay Lytle  
Lorraine Morton  
Betty A. Papangelis  
Claire McCarthy Peterson  
Eleanor Revelle  
Ingrid Stafford  
Robert Teska

**root2fruit Advisory Board**  
Ann Mammel Balusek  
Helen Hilken  
Matthew Moy Johnson  
Falona Joy <sup>2</sup>  
Joi-Anissa Russell <sup>2</sup>  
Singer  
Mary Adams Trujillo <sup>1</sup>

<sup>1</sup> Joined in June 2012  
<sup>2</sup> Completed term June 2012

### evanston community foundation staff

Sara Schastok, Ph.D.  
President and CEO

Marybeth Schroeder  
Vice President for Programs

Jan Fischer  
Chief Financial Officer

Jeremy Barrows  
Director of Development and Communications

Beth Osterlund  
Director of Leadership Evanston

Amy Monday  
Assistant Director of Administration and Development

Maureen Powers  
Program Officer

find us at:  
[evanstonforever.org](http://evanstonforever.org)

Foundation staff:  
**847.492.0990**

### on the cover

Front cover: Cynthia Kasper;  
Jessica Gonzalez and daughter  
Khloe. Back cover: Jonathon  
Connerly-Bey, Gary Arnold,  
Catherine Rocca, Omari Roberts.

writing: Mary O'Connell,  
Jeremy Barrows  
design: chrismier + mardock  
communication design  
principal photography:  
William Burlingham



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