



Building the Future

# Together



**2013**  
**REPORT** to the  
**COMMUNITY**



# Fund for the Future

A message from Trustee Chair Jackie Scott  
and Board President Ken Buchele

It is always a wonderful opportunity when we can tell the story of the Emporia Community Foundation's (ECF) history. It all began in 1995 with a group of six individuals and a gift of \$5,000. Those individuals shared a passion and commitment to Emporia and the surrounding area; a vision, if you will, to build a community foundation that would meet the charitable needs of the community far beyond their lifetime. Eighteen years later, the sound plan established early on in the foundation's development can be measured by the great success of accumulated assets of over \$14 million, multiple donors establishing funds for various philanthropic needs, and charitable giving grants of over \$2 million since its inception. More importantly, the relationships established and maintained over the years convey the bigger story of caring for others and caring about our community.

But our story doesn't end there. In December 2013, one of our founding fathers, Elvin Perkins (Perk), made a challenge and commitment to the ECF Trustees. He challenged the trustees to contribute and solicit others to contribute to ECF's Fund for the Future. His commitment was that, through June 2014, he would match \$1 for every \$4 contributed by someone else, up to \$23,000. As a community foundation we are designed to build endowment funds that benefit the community forever and help create personal legacies. When contributions are made to ECF's endowed Fund for the Future, this gift is invested over time and earnings are used to make grants that address community needs and support the operating costs

**A gift to this fund is  
a permanent source  
of community capital,  
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FOREVER.**

of the foundation — primarily administrative costs. A gift to this fund — and the earnings from the contributions — is a permanent source of community capital, helping to do good FOREVER. With the match to Perk's challenge, we could generate over \$100K toward this fund. Our goal is to raise \$1M for this fund by 2020 and with Perk's match we would be one-fourth of the way there.

Over the years we have had many challenges and yet the opportunities have also been abundant. New funds have been established and we continue to develop contacts with individuals and organizations to share our vision of philanthropic giving in our community and surrounding area. We are taking a lead role of convening with other area non-profit organizations to encourage collaboration, in both identifying critical needs and coordination of ways to meet those needs. We have provided and encouraged growth and learning opportunities for our staff, trustee members, and board members through webinars, workshops, conventions held by state-affiliated organizations, and strategic planning. ECF prides itself in having a dedicated, professional staff, dedicated volunteers (board and trustees) who serve a critical role in helping the foundation grow and donors who are dedicated to meeting the needs of our community.

We hope our 2013 annual report will provide beneficial information and we encourage you to share it with others. Additionally, we encourage you to contact us to answer any questions you may have and to learn more about the foundation and what it means to our community. With your support, we look forward to the continued success of the Emporia Community Foundation.

# Let's Keep Local Money Local

It's a phenomenon called "The Transfer of Wealth" and what that means is that in Lyon County alone in the years 2010-2020, \$845 million will transfer through estates from one generation to the next. The transfer of wealth figure for the other six counties during that same time period is nearly \$1.4 billion (Chase, \$81.4m; Coffey, \$262.5m; Greenwood, \$208.5m; Morris, \$158m; Osage, \$494.5m; Wabaunsee, \$184.3m). On one hand, that's good news because the monies being transferred are staying within the family.

On the other hand, a great deal of that money being transferred is in fact leaving local communities. In many instances, the money is leaving the state of Kansas because younger family members are moving away from home. According to a recently updated Transfer of Wealth study by Wichita State University, \$79 billion will be transferred by 2020 in Kansas and that figure will grow to \$598 billion by 2064.

The Emporia Community Foundation (ECF) has joined the 70 other community foundations in Kansas in a new program called "Keep 5 In Kansas." The program is focused on creating ways to keep five percent of the wealth being transferred in Kansas preserved and invested in communities across the state. If that can be done before 2020, up to \$4 billion would be kept and utilized in communities statewide and in Lyon County alone, that figure would be \$42 million. For the other six counties, that figure would total \$69.5 million.

So how do we go about "Keeping 5 In Kansas"? We can keep five percent of the total amount transferred within our seven county area by encouraging every resident to join together in giving to either our community foundation endowment or to other local nonprofits. This community investment would help us and other non-profits to provide grants to those in need and to other local nonprofits which will ultimately strengthen our community. Think for a moment about what matters most to you. How can you ensure that the things that make your community unique and the things you love continue to exist long after you've gone?

There are many ways to participate – here are three for consideration:

- Designate the community foundation as the beneficiary of your retirement account.
- Designate the community foundation charity as the beneficiary of a life insurance policy.
- Ask your professional advisor to add the community foundation to your estate plan.

Through the "Keep 5 In Kansas" program, we all have an opportunity to build a better future for our citizens. By keeping just five percent of the wealth currently being transferred, we can strengthen the places we call home, improve our quality of life, and create a legacy that will benefit generations to come.

To learn more about the Keep 5 in Kansas campaign and how the Emporia Community Foundation can help you with your charitable bequests, contact the office at 620-342-9304, or visit the campaign website at [www.keepfiveinkansas.com](http://www.keepfiveinkansas.com).

# 5 Keep in Kansas

Campaign Could Result  
In Millions of Dollars  
For Lyon and Its Six  
Contiguous Counties

Your hometown.  
Their future.



You've enjoyed a good life in a great community. What would you do to ensure future generations of Kansans can say the same?

The Keep 5 in Kansas initiative asks us to designate just 5% of our estates to our hometown needs. With a little planning, and help from our community foundations, we can create permanent funding for our schools, hospitals, churches, parks, nonprofits, libraries, and so much more!



A little planning. A big impact.

Learn more at [keepfiveinkansas.com](http://keepfiveinkansas.com)

The Keep 5 in Kansas campaign is sponsored by the Kansas Association of Community Foundations ([kansascf.org](http://kansascf.org)) and the Kansas Health Foundation.

To learn more, visit  
[keepfiveinkansas.com](http://keepfiveinkansas.com)

# Fund List

## Field of Interest

- Building Futures Fund
- Nick Buxton Memorial Fund
- Cheryl Holder Middle School Student Council Activity and Scholarship Fund\*
- Clements Bridge Fund
- Friends of Flint Hills Community Health Center Fund
- Frank & Barbara Davis Jr. Scholarship Fund
- East 9th Avenue Park Fund
- Emporia Public School Foundation Endowment Fund\*
- Fairgrounds Development Fund
- Lyon County Fair Ground Improvement Fund
- CaraLee & Bill Gardner Fund
- CaraLee & Bill Gardner Fund II\*
- Flint Hills Girl Scout Foundation Fund
- Floyd Austin Hagins, Sr. Fund\*
- Hamilton Community Improvement Fund
- Fay & Milton Henderson Scholarship Fund\*
- Hispanics of Today & Tomorrow Fund
- Jones Activity Complex Fund
- Kansas Health Foundation Fund\*
- Kansas Parks Trust Fund
- Knights of Columbus #1589 Capital Improvement Fund
- Gregory Longbine Memorial Athletic Fund
- Lyon County Extension Council Charitable Fund
- Main Street Improvements Fund
- Morgan-Wilke Fund
- Monica Wilkinson Memorial Scholarship Fund
- Nancy Keller Endowment for the Chase County Courthouse Fund\*
- Newman Division of Nursing Fund\*
- Reading Community Fund
- Reading Playground Fund
- Red Rocks Fund
- RR (Red Rocks) Endowment Fund\*
- Sadie A. Jones Charitable Fund\*
- Sertoma Train Fund
- Springer Education Trust Fund
- Twin Rivers Junior Shooting Sports Fund
- USD 284 Scholarship Fund\*
- Buster & Eugenia Wheat Scholarship Fund\*

## Unrestricted

- Fund for the Future\*
- General Fund
- Kathryn L. & Elvin D. Perkins Fund\*
- Loretto A. Langley Church Fund

\* = Endowment Fund

## Designated

- Arts Council Endowment II Fund\*
- Camp Wood Endowment Fund\*
- City of Emporia Kahola Park Fund
- Eastgate Plaza Fund
- Emporia Arts Council I Fund\*
- Emporia Christian School Fund\*
- Emporia City Band Fund\*
- Emporia Friends of the Zoo Fund
- Emporia Humanitarian Center Fund
- Flint Hills Community Health Endowed Fund\*
- Food for Students Fund
- Granada Theater Endowment Fund\*
- Heather Stewart Endowment Fund\*
- Hetlinger Foundation Fund
- Humane Society of the Flint Hills Endowment Fund\*
- Kansas Health Foundation Operating Endowment for CCCF\*
- Kansas Health Foundation Operating Endowment for ECF\*
- Kansas Health Foundation Operating Grant Fund
- Leadership Emporia Fund\*
- Lyon County Historical Society Fund
- National State Teacher of the Year Endowment Fund
- SOS Lohmeyer Family Endowment Fund\*
- SOS Lohmeyer Family Fund
- St. Andrew's Fund

## Donor Advised Fund

- 79 Fund
- Batille Fund
- Anonymous Fund
- Dale & Carolyn Davis Fund
- DeBauge Family Fund
- DJ Glaser Fund
- Hanna Family Fund
- Kaltenbacher Charitable Fund
- Anonymous Fund
- Anonymous Fund
- Fred & Paula Neuer Endowment Fund\*
- Ott Fund
- Perkins Fund
- Richard & Sarah Porter Fund
- Powers Gift Fund
- Jane & Bernard Reeble Fund\*
- Earl & Stelouise Sauder Gift Fund
- Strahm Fund

## Affiliates

- Chase County Community Fund\*
- Growing Greenwood Fund\*



# Anyone can donate to the Emporia Community Foundation

Thanks to the many donors who have established funds for giving back to the community, anyone can donate to the Emporia Community Foundation. Donors to the Foundation are from a variety of backgrounds, but they all share a common commitment and desire to meet the needs of our community. For as many reasons as there are for giving, the Foundation has a variety of ways to give.

## Give to an Existing Fund

Determine the fund(s) you would like to support and do one of the following:

**Donate online**  
[www.emporiacf.org](http://www.emporiacf.org)

**Send a check to the Emporia Community Foundation**  
527 Commercial St., Ste. 501  
Emporia, KS 66801

**Call the Foundation office**  
620-342-9304  
to discuss fund options.

## Establish a Fund

You can create a fund now, establish it in your will or create a trust arrangement that could benefit you as well as a charity.

**Call the Foundation office at**  
620-342-9304  
to discuss setting up a fund.

## Types of Funds

The types of funds are highlighted and defined below.

**Field of Interest Funds:** These funds are established for a specific field of interest, such as the arts, a university, health, or children.

**Designated Funds:** The donors of benefactors for a specific charity direct these funds. Examples include the Emporia Arts Council, the Emporia Christian School and the Humane Society of the Flint Hills.

**Donor Advised Funds:** These funds are established by individuals, who are then able to advise how these funds may be used. Their ultimate distribution may be for any legally defined charity.

**Unrestricted Funds:** These funds are not restricted to any specific purpose and distribution is determined by the ECF Board of Directors.

**Affiliate Funds:** These funds are established by our six contiguous counties for their own communities. Advisory boards raise and distribute funds to address needs in their local communities.

**Fund for the Future:** This endowment fund is for the operations of ECF. The income earned off the corpus may be used as the ECF Board of Directors see fit.

The Emporia Community Foundation  
values every gift, whether it is \$20  
or \$1 million, because it makes a difference  
in the lives of others.



# Grants

ECF is excited to begin a new grant process in 2014. Changes to the process will allow for greater efficiencies and allow the grant committee to make more informed decisions and provide better oversight. One of the major changes is that ECF is moving to one grant period per year thus allowing the grants to be more impactful for the award recipients and the community.



## Fall 2013

Community Literacy \$10,960

**Building Blocks Community Child Care, Inc. (Council Grove) • \$3,060**

Provide funding to purchase a new educational curriculum to better prepare pre-K children for kindergarten.

**Emporia Community Day Care Center**

• \$2,000

Provide funding for additional books in the library at the new consolidated location.

**Elmendaro Township Library (Hartford)**

• \$400

Provide funding for books and musical supplies for children's story hour.

**Cradle to Career Literacy Center • \$4,000**

Provide funding for software and materials to evaluate and provide GED instruction in Spanish.

**Emporia Public Library • \$1,500**

Provide funding for "Family Reading Month" activities and add books and learning toys to the children's collection.



## Spring 2013

Health \$7,315

**Coffey County Wellness • \$1,700**

Provide funding for "Eat! Play! Move!" a healthy eating activities project targeted toward school-age children and families.

**Big Brother Big Sisters (Emporia) • \$1,115**

Provide funding for 8-week summer program of physical activities outdoors and healthy eating ideas for youth involved in the match program.

**Camp Alexander (Emporia) • \$2,500**

Provide funding to purchase and install fitness stations on current trails to enhance healthy lifestyles.

**Emporia Public Library • \$2,000**

Provide funding for books, dvds, exercise kits and various promotional materials on health and wellness for all ages.

# Facebook Like Contest

## Hetlinger Developmental Services, Inc. Receives Grant

In mid-November ECF joined thousands of other organizations in the National Giving Tuesday campaign. The Giving Tuesday™ movement is similar to Black Friday or Cyber Monday, as it also falls in the week following Thanksgiving, but the similarities end there. On the Tuesday after Thanksgiving, people are asked to find ways they can give back to the communities they live in.

ECF decided to participate in Giving Tuesday™ through a donation to a local non-profit organization. They asked for the community's involvement to determine which non-profit organization would receive a \$500 grant. The 500th person to go to ECF's Facebook page and click "like" would be able to choose which local organization received the grant.

Blaine Smith, an ESU employee, was the 500th Like and selected Hetlinger Developmental Services, Inc. to receive the grant. "Hetlinger provides a great service to some amazing people and I'm thrilled my unrivaled page-refreshing skills allowed me to help them out," Blaine said. He also stated, "I think it is awesome that ECF held this contest. It was a fun way to promote all the wonderful organizations in Emporia that help our community."

"Hetlinger Developmental Services would like to thank the Emporia Community Foundation for the generous grant of \$500 through its "Giving Tuesday" event," remarked Trudy Hutchinson, Hetlinger's Director. "What a wonderful way to celebrate and encourage charitable activities that support



non-profit organizations! We are very grateful and appreciative of the grant and will designate it toward our greenhouse building fund. Of course, we also want to thank Blaine Smith for "liking" ECF's Facebook page and especially for selecting Hetlinger as the lucky recipient of the grant!"

The Foundation also gave away two \$25 Chamber gift certificates to thank community members for "liking" their Facebook page. The recipients were Harold Schwinn and Sherri Samuelson Curtis.

## Trusler Foundation Collaborates with ECF for Grant-Giving Process

The Trusler Foundation was established in 1956 by Harold and Irene Trusler, who had a desire to share their good fortune with the Emporia community and surrounding areas. The mission of the Trusler Foundation is to evaluate the needs of Lyon, Chase and Coffey counties that may be best served by its funds for charitable, religious, scientific, literary and educational purposes.

In the process of meetings and discussions, it was determined that ECF would establish an advisory committee to include representation from all three counties to implement the grant

distribution process. The advisory committee has the full authority to accept or decline a grant request. ESB Financial serves as the Trusler trustee.

Grant applications are accepted three times per year with deadlines of April 1, August 1 and November 1. The application for funds may be downloaded from the ECF website or picked up at the ECF office. The Emporia Community Foundation is proud to partner with the long-established Trusler Foundation and to be an integral part of the grant distribution process.

# CCCF Awards First Grants

A lot has happened with the Chase County Community Fund in 2013. For the first time, the CCCF was able to give back to the community in the form of grants totaling \$5,000. It was a dream realized!

The first CCCF grant period occurred in the fall. CCCF was able to award four grants. Chase County Care & Compassion, Inc. (C4) received \$1500 to be used for the food pantry. The funds were used to purchase food and help stabilize their funding. The Chase Children's Services Preschool purchased technology for the classroom with their \$1500 grant award. This will improve the education of the youngest citizens of Chase County. The Chase County Elementary School was awarded \$1,500 for their greenhouse to help with the new project based learning focused on agriculture that was implemented this year. The Symphony in the Flint Hills was given \$500 towards a collaboration with the high school journalism students to produce a magazine about the Joyful Noise event.

The Chase County Community Fund will have two open, competitive grant periods each year. Applications for the spring round of grants will be accepted from February 15th to March 15th. Applications for the fall round will be accepted from August 15th until September 15th. Award announcements will be made in April and October. Applications are available on the CCCF Facebook page or the ECF website under the Affiliates link.

We have been blessed with great donors and hard working volunteers. The CCCF is looking forward to a wonderful 2014. We hope to continue to improve community awareness about the CCCF and raise even more funds toward our endowment. We may not know the needs of Chase County in 40 years, but the Chase County Community Fund will be here to help meet them.



## 2013 Advisory Board

**Mike Spinden**, *President*

**Mike Holder**, *President Elect*

**Nancy Griffin**, *Secretary/Treasurer*

**Janet Ayers**

**Cathy Barnes**

**Brian Flinger**

**Bruce Wells**



To learn more about how you can fund  
the future, visit [emporiacf.org](http://emporiacf.org)

# Planning Ahead

## ECF Adopts NEW Five-Year Strategic Plan



Over the past several months ECF has embarked on a very comprehensive strategic planning journey. In September 2013 we held a Trustee and Board retreat to begin the design, development and deployment of a new five-year plan and took the opportunity to look at the variety of factors influencing our overall operations. We wanted to examine what we do well and what we need to consider changing to allow us to better serve the needs of Lyon and its six contiguous counties. We are very excited about our new mission statement and the creation of a vision and value statements. This plan will be the foundation and guide as we forge new strategic directions and it will help us achieve better outcomes for the citizens we serve.

We welcome and encourage you to review our Strategic Plan and provide us your feedback as it is implemented. Please note that this is a living document and thus the activity within each of its priorities will be reviewed at least annually to assure we are fulfilling our mission as the community's foundation.

### Our Mission

To connect caring people with causes that build stronger communities within the Emporia area, which includes Chase, Coffey, Greenwood, Lyon, Morris, Osage and Wabaunsee counties.

### Our Vision

We envision a community where all residents within the Emporia area, including Chase, Coffey, Greenwood, Lyon, Morris, Osage and Wabaunsee counties, have the opportunity for a high quality of life.

### Our Values

**Philanthropic Culture:** We believe an endowed foundation is critical for a long lasting legacy within our seven county service area. We promote charitable donor services, solutions and education as a valuable function and ongoing activity.

**Transformational Leadership:** We listen to and learn from the communities we serve. We address the root causes of community problems and mobilize resources for the common good through opportunities for grant making, education and convening groups to address community needs.

**Inclusiveness:** We practice and champion inclusiveness and equity in our community. We honor diverse strengths, needs, voices and backgrounds of all members of our community.

**Accountability:** We serve as stewards for our community investments and honor the charitable intentions of our donors to meet current and future community needs. We hold ourselves to the highest standards of ethics, integrity, service, and fiduciary responsibility.

**Quality of Life:** We help create opportunities for Education, Employment, Healthy Lifestyles, Cultural Offerings, Safety and Food, Clothing, Shelter and Healthcare.

### STRATEGIC PRIORITIES

#### **STRATEGY I: Initiate strategies that will result in increased philanthropic giving and community growth.**

- Goal 1: Establish focus projects that the Foundation can be known for and inspire giving
- Goal 2: Provide information to potential donors concerning opportunities, implications, and benefits of charitable giving.
- Goal 3: Participate in legislative efforts that support/increase charitable giving.

#### **STRATEGY II: Enhance ECF's role and image as the community's expert resource for charitable giving.**

- Goal 1: Develop/enhance relationships with professional advisors
- Goal 2: Develop/enhance relationships with potential/current trustees and major donors
- Goal 3: Develop/enhance relationships with area non-profit agencies/organizations
- Goal 4: Develop/enhance relationships with area media representatives

#### **STRATEGY III: Build a sustainable Foundation.**

- Goal 1: Develop operations and systems that will impel ECF's growth and increase its impact.
- Goal 2: Develop donor referrals.
- Goal 3: Strengthen marketing strategies.
- Goal 4: Expand endowed and legacy funds.
- Goal 5: Develop a trustee recruitment and development plan that includes a means to more fully engage trustees in the work of the Foundation.

#### **STRATEGY IV: Provide active support for community non-profit agencies/organizations.**

- Goal 1: Increase grant dollars to provide more help for community needs.
- Goal 2: Collaborate with community grant makers.

# Statement of Financial Position

As of December 31, 2013

Current Assets	Assets	Liabilities/Fund Balance
Cash and Cash Equivalents	\$ 239,255.29	
Investments	\$ 14,429,225.88	
Oil Interests	\$ 6,100.00	
Notes Receivable	\$ 50,056.32	
Liabilities		
Notes and Payroll Taxes Payable		\$ -
Fund Balances		\$ 14,724,637.49
<b>Total Assets/Liabilities</b>	<b>\$ 14,724,637.49</b>	<b>\$ 14,724,637.49</b>

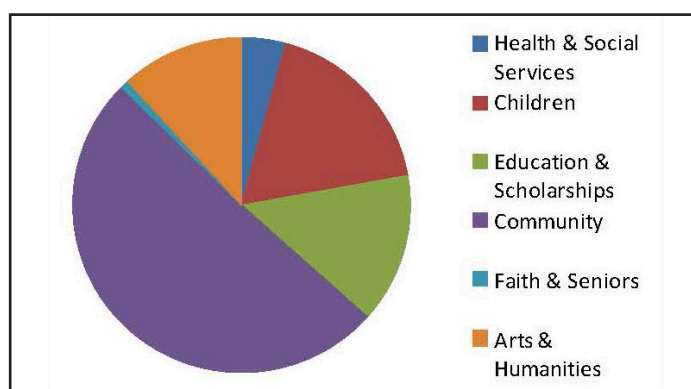
## Statement of Activities

for year ending December 31, 2013

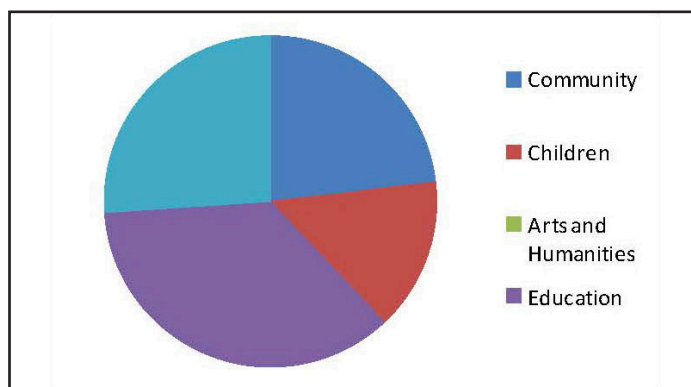
Revenues	
Contributions	\$ 2,091,001.51
Pooled Income	\$ 2,167,141.15
Other Income	\$ 26,651.19
Fee Income	\$ 124,475.31
<b>Total Revenue</b>	<b>\$ 4,409,269.16</b>
Expenses	
Grants	
Unrestricted Grants	\$ 23,774.89
Grants from Donor Advised	\$ 354,952.37
Grants from Designated	\$ 185,823.00
Grants from Field of Interest	\$ 266,038.52
Grants from Affiliates	\$ 17,000.00
Supporting Services	
Office & Investment Expenses	\$ 89,108.22
Payroll with Taxes	\$ 53,523.58
Real Estate Expenses	\$ 9,384.34
Fees Paid by Funds	\$ 124,475.31
Fundraising for all Funds	\$ 38,517.45
<b>Total Expenses including Grants</b>	<b>\$ 1,162,597.68</b>

## Grants by Program Area

Donor Advised, Designated, and Field of Interest Funds



## Unrestricted Grants



## 3 Year Recap

	2011	2012	2013
Net Assets Beginning of Year	\$ 10,047,214.69	\$ 12,004,387.19	\$ 11,981,274.05
Net Assets End of Year	\$ 12,004,387.19	\$ 11,981,274.05	\$ 14,724,637.49
Increase/Decrease in Net Assets	\$ 1,957,172.50	\$ (23,113.14)	\$ 2,743,363.44
Pooled Income Earnings	\$ (45,022.85)	\$ 974,612.08	\$ 2,167,141.15
Grants	\$ 997,865.03	\$ 2,328,825.53	\$ 847,588.78



## 2013 Board of Directors

**Ken Buchele**, *President*  
**Mark Schreiber**, *Vice President*  
**Jeff DeBauge**, *Treasurer*  
**DJ Glaser**

**Kay Lauer**  
**Jackie Scott**  
**Bob Symmonds**

## Emeritus Directors

**Ken Calhoun**

**Elvin Perkins**



## Staff

**Shirley Antes**, *Executive Director and acts as secretary to both groups*  
**Loni Heinen**, *Administrative Assistant*



## Trustees during 2013

**Jackie Scott**, *Chair*  
**Mark Schreiber**, *Vice Chair*  
**Tom Bell**  
**Ken Buchele**  
**Jeff DeBauge**  
**Skip Evans**  
**Eddie Gilpin**

**DJ Glaser**  
**Jim Kessler**  
**Cynthia Kraft**  
**Kay Lauer**  
**Janis Meyer**  
**Elvin Perkins**

**Larry Putnam**  
**Sally Sanchez**  
**Brian Schmidt**  
**Bob Symmonds**  
**Jennell Tebbetts**  
**Bobby Thompson**  
**Chris Walker**



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**[www.emporiacf.org](http://www.emporiacf.org)**



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