



TRACY FAMILY

FOUNDATION

2014 | annual report



# Introduction

Robert and Dorothy Tracy raised their 12 children and founded the family business – Dot Foods – in Mt. Sterling, Illinois. The counties of Adams, Brown, Cass, Greene, Hancock, McDonough, Morgan, Pike, Scott, and Schuyler surround this small community in west central Illinois. The counties are referred to as the Region.

Collectively, the Tracy family strives to make Brown County, the Region, their communities, and the world a better place. The Tracy Family Foundation (TFF) is the platform from which the family gives their time, talent, and resources.

# Mission Statement

EDUCATION  
Brown County & Region

YOUTH & FAMILIES  
Brown County & Region

Tracy Family Foundation  
2013-17 Focus Areas

Brown County & Region  
LEADERSHIP

Brown County Only  
ECONOMIC  
DEVELOPMENT

The Tracy Family Foundation exists to provide resources to organizations that foster the values of Robert and Dorothy Tracy – a Catholic/Christian belief, honesty, integrity, fairness, and a strong work ethic.

The Foundation seeks to proactively strengthen Brown County in Illinois and the surrounding Region by investing in the education, youth, families, and the capacity of these communities. The Foundation is also the vehicle for developing a philanthropic spirit among Tracy family members.



Tracy family – 1st, 2nd, and 3rd generations



Robert and Dorothy Tracy

# Tracy Family

Developing a philanthropic spirit among Tracy family members is an essential part of the Tracy Family Foundation’s Mission. It is indeed alive, well, and spreading among all generations! Giving their time, talent, and resources can be seen throughout the fabric of the Foundation. Evidence of this spirit is visible in so many venues – the Matching and Next Generation Grant programs, volunteering, Next Generation Advisory Board (NGAB), and serving on committees and the board.



A Next Generation Grant enabled the Kissing Well to purchase desks for students in Uganda.

Tracy Family Foundation Matching Grant Program				
<b>Program Description:</b> Full-time staff of one year and longer, TFF trustees, and Tracy family members ages 16 and older are eligible to apply for grant funds on behalf of a nonprofit organization if the trustee, staff, or family member personally contributes to the nonprofit organization.				
2014 Grant Dollars Awarded	2014 Personal Dollars Donated	Total TFF and Personal Dollars Awarded	Total Number of Grant Awards	Percent of 1G, 2G, and 3G Family Members Participating in the Program
\$802,169	\$381,553	\$1,183,722	170	1G = 100% 2G = 100% 3G = 41%

Next Generation Grant Program		
<b>Program Description:</b> Next Generation Tracy family members between the ages of 5 and 30 are eligible to apply for grants on behalf of nonprofit organizations. Educating Next Generation family members on the needs and issues in their communities is the main intention of this grant program.		
2014 Grant Dollars Awarded	Total Number of Grant Awards	Percent of Eligible Family Members Participating in the Program
\$66,500	41	84%

In August 2014, three generations of the Tracy family participated in the first annual Tracy Family Volunteer Project. Twenty-nine family members volunteered at Share the Harvest Food Pantry in Missouri. A philanthropic spirit was evident throughout the day as tasks – such as gardening, window washing, working in the warehouse and food pantry, vacuuming, and cleaning the kitchen and bathrooms – were completed.

Just as important as building a philanthropic spirit among family members is building leadership among the Tracy family.

Behind the 2nd generation of Tracy family members is an army of 3rd generation members with a strong appetite to lead and carry on the legacy of their grandparents – Robert and Dorothy Tracy – through the Foundation. But passing the leadership torch takes time, planning, and relevant experience.

Through service on the TFF board, Next Generation Advisory Board and numerous committees, 3rd generation leaders are being developed. In 2014, 22 members of the 3rd generation were active participants on TFF boards and committees.



## Mission Statement of the Next Generation Advisory Board



2014 NGAB Members (above)

Cover of 'The Tracy Family A-B-C Book,' a 2014 project of the NGAB (right)



The Next Generation Advisory Board exists to cultivate an understanding of philanthropy and build leadership skills in the next generations. The NGAB will actively listen to all generations, offering opportunities, education, and support to fulfill the Tracy Family Foundation's vision for the family.

# Thank You's



# Focus Areas

**EDUCATION**  
Brown County & Region

**YOUTH & FAMILIES**  
Brown County & Region

Tracy Family Foundation  
2013-17 Focus Areas

**Brown County & Region**  
**LEADERSHIP**

**Brown County Only**  
**ECONOMIC**  
**DEVELOPMENT**

The proactive work of the Foundation is done primarily in west central Illinois. We are strategically striving to make a positive, measurable impact in this area of the country. Initiatives and projects of the Foundation often support one or more focus area.

# Focus Area: Education

Definition: Activities and organizations that directly impact academic achievements and excellence from Early Childhood to Post-Secondary graduation.

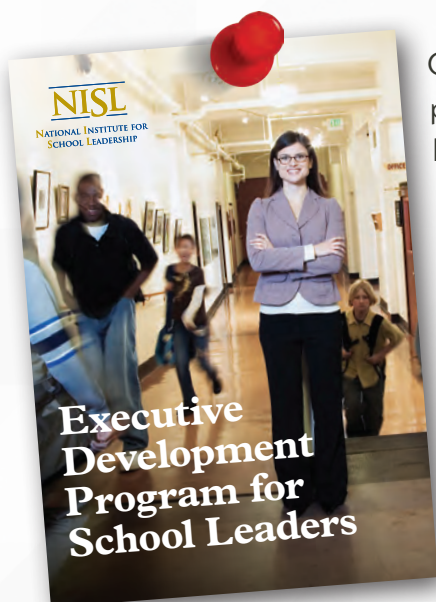
## Early Childhood

Before embarking upon a proactive effort in any focus area, we spend countless hours researching the issue area and gaining an understanding of the gaps and opportunities. In 2014, this is what occurred. Within the complex arena of Early Childhood, it is pertinent we clearly define the following before making a sizeable investment: What developmental domain do we wish to address – social/emotional, cognitive, language and literacy, or physical? What is our desired impact? What will be our level of involvement? There are so many questions we hope to have answered in 2015 and then be in a position to make a thoughtful, educated decision on where and how to invest.



## Grades K-12

For several years, the Tracy Family Foundation has worked closely and proactively with K-12 schools in Brown County and 10 Catholic schools in west central Illinois, and it is our goal for this area to have a world-class education system.



Our approach has allowed us to see first-hand the challenges faced by principals, teachers, and other school leaders. Their jobs' demands have brought to the forefront the critical need and appetite for long range planning and leadership development. The Foundation is directing resources to both of these areas. We want to support school leaders so they can effectively and efficiently attend to the immediate needs of their schools and districts as well as prepare their students for the future.

In late 2014, the Foundation announced the launch of a School Leadership Initiative that will begin in June 2015. Both public and private school leaders will be eligible participants in a 27-day curriculum provided by the National Institute of School Leadership.

## K-12 Catholic Schools

“Plan your work, work your plan.” This mantra and approach carries over in the Foundation’s quest to help Catholic schools thrive, not just survive. The Foundation supports 10 Catholic schools in west central Illinois in their long range planning efforts and implementation. Through this process and through the determination of many engaged individuals and organizations, the results are promising!

2013-14 vs. 2014-15 Catholic School K-12 Enrollment			
	Nationally	Springfield Diocese	TFF-Supported Schools
Increase or Decrease	-1.7%	-.1%	+3.4%

The impact of the Foundation’s work with Catholic schools received national recognition. The National Catholic Education Association named the Foundation as a 2014 NCEA Seton Award Recipient. The award is given to individuals and organizations who NCEA feels have made outstanding contributions to the well-being of our nation’s youth and/or Catholic education.

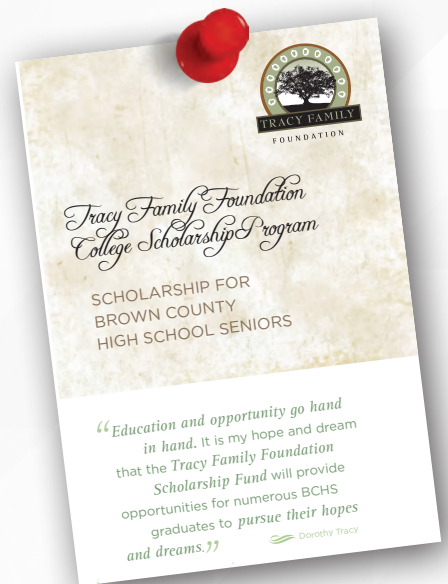


NCEA Awards Ceremony

## Post-Secondary

The hopes and dreams of Dorothy Tracy are coming true.

Thirty-two Brown County High School alumni and recipients of TFF college scholarship dollars were enrolled full-time in college in the fall of 2014. The funding is provided to Scholarship America, the administrator of the program.



## The Foundation’s Four Pillars of Excellence for Catholic Schools

- Enrollment at Capacity
- Financial Stability
- Academic Excellence
- Catholic Identity



# Grant Awards in the Focus Area of Education

## 2014 GRANT RECIPIENTS FOR THE FOCUS AREA OF EDUCATION

**2014 Total Education Grant Dollars: \$1,057,433**

### Brown County T.E.A.C.H.E.R. Fund Grant Program

School	Project
Brown County Elementary School	Tables for Collaborative Learning
Brown County School District #1	SMART Board Training
Brown County Elementary School	Fine Arts Program
Brown County Elementary School	3rd Grade Laptop Cart
Brown County Elementary/Middle School	Summer Assessment Academy
Brown County Elementary/Middle School	Training and Professional Development
Brown County Elementary/Middle School	Instructional Leadership and Sustainability Teams Stipends
Brown County Elementary/Middle School	Leadership Development
Brown County High School	Tables for Collaborative Learning
St. Mary School	Fine Arts Program
St. Mary School	Lit Wits Book Club
St. Mary School	Leader in Me – 7 Habits Program
St. Mary School	Early Childhood Curriculum and Assessments
St. Mary School	Technology Training
St. Mary School	Technology

### Formal Funding Grant Program

Organization	Project
Griggsville-Perry High School	Technology
St. Mary School Taylorville	Technology Coordinator
Camp Point CUSD #3	Assessment
Home Works	General Operating Support
Bushnell-Prairie City CUSD #170	Get Ready for School Day
West Prairie North Elementary	School-wide Bookroom
Sts. Peter & Paul School	Health and Wellness Initiative
Dominican Academy of New York	Scholarships
Covenant House of Missouri	Education Program Request
Sacred Heart Griffin High School	Teacher Grant Fund
Webster Elementary School	Accelerated Reading
8 Points Charter School	General Operating Support
Chaddock Children's Foundation	New School Construction Project
Scholarship America	Scholarship Program for BCHS Students
Quincy School District #172	National SAM Innovation Project
Regional Office of Education #1	Training Partner for School Leadership Initiative
Criterion Education LLC	Planning Grant for School Leadership Initiative

### Catholic Schools Grant Program

School	Project
Ace Consulting, University of Notre Dame	Assessments and Long Range Planning for 10 Schools
Blessed Sacrament Catholic School	Reading/Math Intervention Program
Blessed Sacrament Catholic School	Reading Program
National Catholic Education	Elizabeth Ann Seton Grant and Professional Development for 10 Schools
Our Saviour School	NWEA Assessment
Quincy Catholic Elementary Schools Foundation	Operational Support and Long Range Planning Support to 10 Schools
Quincy Notre Dame High School	Technology and Professional Development
Routt Catholic High School	Technology and Math Tutor
St. Dominic School	Textbook Updates and Curriculum Enhancements
St. Francis Solanus School	Academic Intervention Specialist and Math Curriculum
St. Francis/Holy Ghost School	Technology and Professional Development
St. John the Evangelist	Technology, Math Curriculum, and Professional Development
St. Peter School	Social Studies and Science Curriculum
St. John the Evangelist	Technology
St. Mary School	Literacy and Marketing
St. Peter School	Literacy Improvement Project



# Focus Area: Leadership

Definition: Activities that build Brown County and the Region's capacity for leadership by providing the resources, knowledge, and connections that community members and students need to shape the future of these communities.

School, civic, and youth leadership are critical to a healthy community.

The youth of today are tomorrow's doctors, elected officials, teachers, technology wizards, and parents. They are the team builders and project managers of tomorrow's families, businesses, and communities. Giving them opportunities to develop leadership competencies so that they are equipped to be tomorrow's problem solvers and decision makers is critical, which is why the Foundation supports **youth leadership**.



Outward Bound Participants

Through grant support to the Student Council, the University of Illinois Youth Leadership Academy, and Outward Bound, Brown County youth now have a host of opportunities available to help them develop their leadership skill sets. Youth throughout west central Illinois are also building their leadership competencies through participation in youth mission trips.

Knowing that **school leadership** is crucial to high performance in student achievement, the Foundation has taken the leap to proactively support the development of school leadership throughout west central Illinois. In June 2015, the first cohort of 30–35 educators will begin a journey that includes 27 days of curriculum centered on the areas of vision and goals, teaching and learning, capacity and commitment, and driving for results. Our goal is to provide leadership development training to 150 school leaders in west central Illinois between the years 2015 and 2020.

To date, most of our focus has been on the development of youth and school leadership. But through a grant to the Illinois Women in Leadership, we have dipped our toe into the support of **civic leadership**.

## 2014 GRANT RECIPIENTS FOR THE FOCUS AREA OF LEADERSHIP

2014 Total Leadership Grant Dollars: \$73,500

Organization	Project
North Carolina Outward Bound School	Leadership Training for Brown County High School Students
Vermont Street United Methodist Church	Youth Mission Trip
Quincy Notre Dame High School	Catholic Heart Work Camp
St. Peter & Paul Church	Catholic Heart Work Camp
St. Thomas and Holy Family Youth Group	Catholic Heart Work Camp
Brown County High School	Youth Leadership Development
Panther Pride Foundation	7 Habits of Highly Effective People
Quincy Exchange Club Foundation	Character Champions Program
IWIL - Illinois Women In Leadership	IWIL Symposium

# Outward Bound Course Evaluation

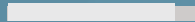
"After my course, I am more likely to..."

80%



Be a leader in my school or community.

90%



Assist people who need help.

93%



Accomplish my goals.

93%



Believe in my ability to succeed.

91%



Take responsibility for my actions.

83%



Participate in service to my community.

# Focus Area: Youth & Families

**Definition:** Activities and organizations that work to build strong kids, families, and communities.

Support from the Foundation is sprinkled throughout the Region to numerous organizations, addressing a host of different needs of the area's youth and families.

Whether we are aiding in the development of healthy youth through fine arts programs or supporting vulnerable families, the Foundation is committed to providing grants to organizations that build strong kids, families, and communities.

The YMCA is one such organization. In 2014 and over the past several years, the Quincy YMCA developed a presence in the Region in part through grants from the Tracy Family Foundation. Branches of the Quincy Y are now present in the communities of Barry, Mendon, Mt. Sterling, and Payson. Youth and families from numerous counties in west central Illinois are now able to access YMCA programs and facilities.

Unfortunately, the breakdown of the family unit as we know it is the not-so-good news of this focus area. The percentage of births to single moms and the number of fatherless families is rapidly increasing. In 1960, the percentage of children born out of wedlock was around 5 percent. Fast forward to 2013: The number has escalated to 40.3 percent. While these are national statistics, the same results are being mirrored in west central Illinois.

So what can be done? Countless hours were devoted to understanding the root causes and potential, evidence-based efforts that could lead to improving the situation in 2014. Stay tuned in 2015 for a proactive effort by the Foundation in this arena.



## 2014 GRANT RECIPIENTS FOR THE FOCUS AREA OF YOUTH & FAMILIES

**2014 Total Youth & Family Grant Dollars: \$251,501**

Organization	Project
Pregnancy Resource Center	General Operating Support
National TTT	Camp for Girls Project
Two Rivers Foundation	School Supplies Program
Quincy Community Theater	General Operating Support
Quincy Art Center	Smart Kids: Art Mentor Program
Quincy Symphony Orchestra Association	Youth Music Programs
Quincy Society of Fine Arts	Art Dollars and Instant Art Dollars
Youth in Need	Teen Outreach Program
Grace Through Faith Ministries	Healthy Community Development Grant
Bright Promises Foundation	Trauma Support Services
Brown County United Way	General Operating Support
Cheerful Home	Outreach Family Support Program
Girls on the Run of Central Illinois	Brown, Morgan, and Scott Counties Support/Expansion
Midwest Youth Services	General Operating Support
M.E.R.C.Y. Communities	Transitional Living Program
Part of the Solution	Social Worker Position
Hobby Horse House of Jacksonville	Positive Parenting Program Expansion
Astoria Elementary School	Little Lap Learners
Girl Scouts of Central Illinois	Be Healthy, Be You
St. Louis Crisis Nursery	Keeping Kids Safe
Quincy YMCA	Mendon, Mt. Sterling, and Payson YMCA Support
Tennyson Center For Children	Education for Children and Teens

# Focus Area: Economic Development

Definition: Activities and organizations that support the implementation and sustainability of the 2011 Mt. Sterling Uptown Long Range Strategic Plan and the economic development and well-being of Brown County.

While growing up in Mt. Sterling, the second generation Tracy family members fondly remember a thriving uptown. These memories and experiences have provided the motivation needed to work diligently on the implementation of the 2011 Mt. Sterling Uptown Long Range Strategic Plan.

Essential to the success of the 2011 Mt. Sterling Uptown Long Range Strategic Plan is the involvement of not just the family, but three sectors: public, private, and civic. All three sectors are actively involved in turning the vision into reality.

Revitalization efforts in Uptown Mt. Sterling are clearly visible, as is the can-do spirit of community members. Through a newly formed organization, Action Brown County (ABC), 165 community members racked up 1,581 volunteer hours in 2014 to spearhead numerous projects focused on community betterment. Partially due to a TFF grant, ABC was able to hire a part-time executive director to lead the organization's activities.

## 2014 GRANT RECIPIENTS FOR THE FOCUS AREA OF ECONOMIC DEVELOPMENT

2014 Total Economic Development Grant Dollars: \$30,000

Organization	Project
Action Brown County	Support for Executive Director Position



# Grant Programs

The Tracy Family Foundation administers six grant programs: Brown County T.E.A.C.H.E.R. Fund, Capacity Building, Catholic Schools, Formal Funding, Matching Grants, and Next Generation Grants.

Grant Program	Geographic Focus	Who Can Apply	Target Focus
Brown County T.E.A.C.H.E.R. Fund	Brown County in Illinois	Teachers and administrators at Pre-K-Grade 12 schools in Mt. Sterling, Illinois.	Instructional Focus
Capacity Building	West central Illinois	Recipients of Formal Funding grants and Dot Foods Charitable grants.	Organizational Effectiveness
Catholic Schools	West central Illinois	Principals at Catholic schools located in Carrolton, Jacksonville, Jerseyville, Mt. Sterling, and Quincy.	Academic Excellence, Catholic Identity, Enrollment, and Financial Stability
Formal Funding	West central Illinois counties of Adams, Brown, Cass, Greene, Hancock, McDonough, Morgan, Pike, Schuyler, and Scott.	Any qualified organization located in the approved Illinois counties. Tracy family members living outside these counties may issue a limited number of invitations to organizations.	Education, Leadership, Youth & Families, and Brown County Economic Development
Matching Grants	USA	Tracy family members, staff, and trustees on behalf of nonprofit organizations.	In keeping with the Foundation's Mission
Next Generation Grants	USA	Tracy family members on behalf of nonprofit organizations.	In keeping with the Foundation's Mission

# Grantmaking

Here's a summary of the Tracy Family Foundation giving per grant program in 2014.

GRANTS PAID BY PROGRAM	
Program	Dollars
Brown County T.E.A.C.H.E.R. Fund	\$273,976
Capacity Building	\$31,095
Catholic Schools	\$445,559
Formal Funding	\$692,899
Matching Grant	\$802,169
Next Generation Grant	\$66,500
Total	\$2,312,198

# Grantmaking Process

All requests to the Foundation must be submitted online through the Tracy Family Foundation website: [www.tracyfoundation.org](http://www.tracyfoundation.org).

Pre-applications are required for the Brown County T.E.A.C.H.E.R. Fund, Catholic Schools, and Formal Funding Grant programs. Once the pre-application is submitted, TFF contacts an organization regarding an invitation to apply for a grant. Capacity Building, Matching Grants, and Next Generation Grants do not require pre-applications.

# Grantmaking Timeline

Cycle	Pre-App Due	Grant App Due	Awards Announced
<b>Brown County T.E.A.C.H.E.R. Fund and Formal Funding</b>			
I	January 1	March 1	April
II	May 1	July 1	August
III	September 1	November 1	December
<b>Catholic School Grant Program (by Invitation Only)</b>			
III	September 1	November 1	December
<b>Capacity Building, Matching Grants, and Next Generation Grants</b>			
Applications are accepted on an on-going basis throughout the year.			Immediately after submission.

## 2014 Financials January 1-December 31, 2014 (Pre-Audit)

Statement of Financial Position	
<b>Assets</b>	
Cash and Cash Equivalent	\$568,972
Pledges Receivable	\$3,910,000
Investments	\$7,770,263
<b>Total Assets</b>	<b>\$12,249,235</b>
<b>Total Liabilities</b>	<b>\$12,780</b>
<b>Net Assets</b>	<b>\$12,236,455</b>
<b>Total Liabilities and Net Assets</b>	<b>\$12,249,235</b>

Statement of Activities	
<b>Revenue</b>	
Contributions	\$3,910,000
Interest and Dividend Income	\$168,870
Refund of Grants to Public Charities	\$150
Miscellaneous Income	\$7
Net Realized/Unrealized Gain (Loss) on Investments	\$242,901
<b>Total Revenue</b>	<b>\$4,321,928</b>
<b>Expenses</b>	
Total Grant Expense	\$2,312,198
Total Operating Expense	\$168,359
<b>Total Expenses</b>	<b>\$2,480,557</b>
Increase in Net Assets	\$1,841,371
<b>Net Assets at Beginning of Year</b>	<b>\$10,395,084</b>
<b>Net Assets at End of Year</b>	<b>\$12,236,455</b>

# Trustees, NGAAB, and Staff

## Trustees

- Jean Buckley (President)
- Pat Smith (Vice-President)
- John Oliver (Secretary)
- Lauren Tracy (Treasurer)
- Angie Tracy
- Kristin Tracy
- Fred Schmidt
- Jane Tracy
- Jim Tracy
- Mary Sullivan



Tracy Family Foundation Trustees

## Next Generation Advisory Board Members

- Megan Buckley (Chair)
- Kelsey Tracy (Vice-Chair)
- Christine Tracy (Secretary)
- Eric Terwelp
- Luke Stamerjohn



Next Generation Advisory Board Members

## Staff (full-time and part-time)

- Jean Buckley (President)
- Kim Bielik (Administrative Assistant & Grants Manager)
- Linda Tracy (Program Associate)



Tracy Family Foundation Staff





P.O. Box 25 | Mt. Sterling, Illinois 62353

[www.tracyfoundation.org](http://www.tracyfoundation.org)

