



TRACY FAMILY

FOUNDATION



# Annual Next Gen Ozark Meeting

August 5, 2019



# Agenda



1. 4G Learning to Give Activity
2. TFF Projects
3. 3G TFF Focus Area
4. NGAB Update
5. Volunteer Activity
6. Next Gen & Matching Grant Review/Voting
7. 3G/4G Group Photo

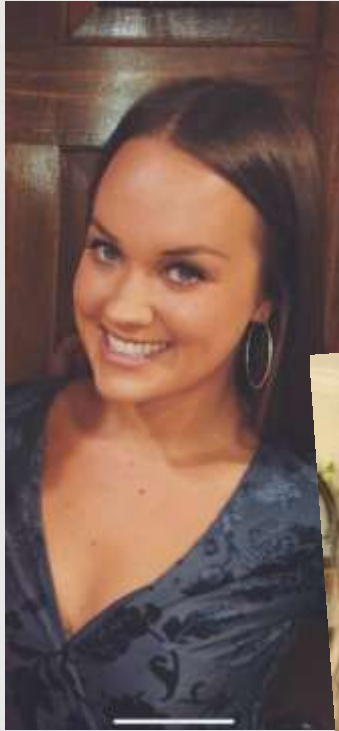


# 4G Learning to Give



All 4Gs dismissed to the Boardroom for story-time and an art project.





# Next Gen Advisory Board 2019

Teresa Sullivan (Chair), Jake Schlater (Vice Chair), Micaela Tracy (Secretary),  
Annie Tracy, Ellie Stamerjohn, Fr. Mark Tracy and Sam Tracy  
TFF Advisor: Megan Costigan



# TFF Mission, Vision & Values

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- ❧ **Mission:** advance innovative, collaborative, and sustainable change in communities and cultivate a philanthropic spirit in all generations of the Robert and Dorothy Tracy family.
- ❧ **Vision:** see a world where communities thrive and families flourish with all generations of the Robert and Dorothy Tracy family giving and serving together.
- ❧ **Values:** Family, Faith, Education, Leadership & Community



# TFF Projects



- ♥ Website
- ♥ Logo
- ♥ Grants Management Software
- ♥ Retreat
- ♥ Long-Range Strategic Plan





# TFF Website Update



## Process

- 7 companies → 4 → 1
- Website design build, copy and photos

## Provider: Telegram Agency

## Current status





# TFF Logo Update







# TFF Logo Ideas



A



C



E



F





# 2019 TFF Retreat



♥️ **When:** Saturday, October 19, 2019

♥️ **Where:** Mt. Sterling, IL



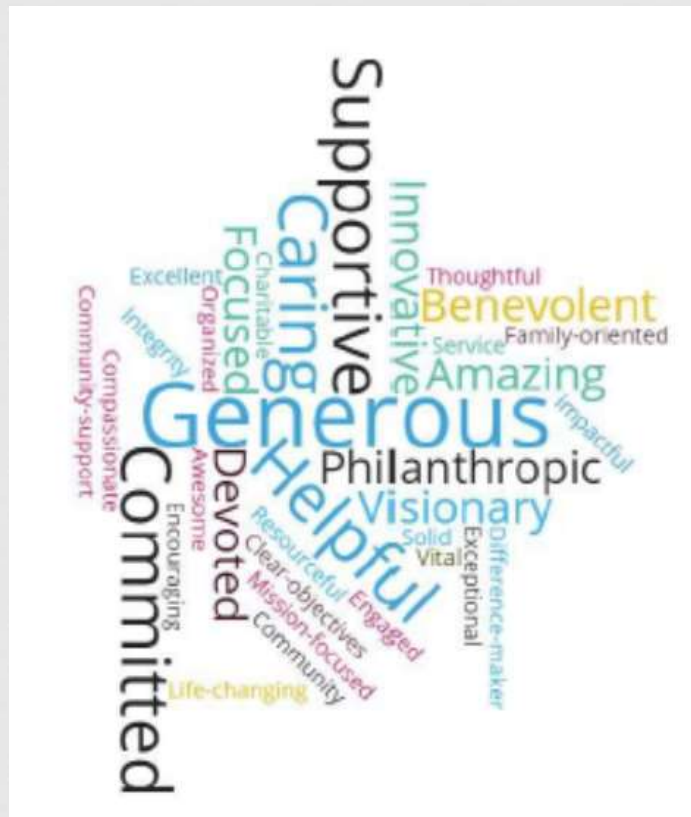


# Long Range Strategic Plan



TFF Grantee Survey Word Cloud

TFF Family Survey Word Cloud





# 3G TFF Focus Area



- ☞ 3G Focus Area will become TFF's 5<sup>th</sup> Focus Area for funding in West Central Illinois
- ☞ Decision-making Process
  - ✓ **June:** TFF Family Survey
  - ✓ **Aug/Sept:** Networking with Angie & Megan
  - ✓ **Sept/Oct:** Research the “big themes” from networking
  - ✓ **Oct. 19:** Present top 3-5 potential focus areas at TFF Retreat
  - ✓ **Nov:** Firm decision made on 3G Focus Area
- ☞ Networking questions



# What do you believe the new TFF 3G Focus Area should be?

*(Results from TFF Family Survey)*





# Next Gen Grant Program



- ☞ **Who is eligible? 3 & 4Gs ages 5-30**
- ☞ **How many TFF dollars can I give annually?**
  - Age 5-10: \$1,000
  - Age 11-17: \$2,000
  - Age 18-24: \$3,000
  - Age 25-30: \$5,000
- ☞ **2018 Participation**
  - 3Gs: 85%
  - 4Gs: 100%
- ☞ **2019 Participation (as of 7/23)**
  - 3Gs: 24%
  - 4Gs: 43%

*ALL GRANT PROGRAMS MUST BE IN KEEPING WITH THE TFF MISSION STATEMENT AND THE VALUES OF ROBERT + DOROTHY TRACY FAMILY.*



# Matching Grant Program



- ☞ **Who is eligible?** 3Gs ages 16 and older
- ☞ **What is the minimum requirement of personal dollars donated?** \$50
- ☞ **How much will TFF match my personal donation?**
  - Up to \$60,000 per year
  - Ages 16-30: 5:1
  - Ages 31-39: 4:1
  - Ages 40 and older: 3:1
  - All ages can choose a 3:1, 2:1 or 1:1 ratio option
- ☞ **2018 Participation:** 50%
- ☞ **2019 Participation (as of 7/23):** 37%



# Family Invitation Grant Program



- ❧ **Who is eligible?** Family members 30 and older who live outside of the 10 counties in West Central Illinois
- ❧ **How many invites can I submit per year?** 1
- ❧ **How many TFF dollars can I request?**
  - Ages 30-39: \$10,000 per year
  - Ages 40 and older: \$15,000 per year
- ❧ **Does the grant request need to be in keeping with one of TFF's focus areas?** Yes
- ❧ **Do I have to donate any personal dollars?** No
- ❧ **Next Invitation Deadline:** September 1
- ❧ **First Step in Process:** Tracy family member selects an organization and then must get approval from Dan to invite the organization to submit a Formal Grant Application.





# Volunteer Incentive Program



## Program Changes

- No longer linked to Next Gen Grant Program
- Ages 5+ are eligible
- Hours can be accumulated over 2 years, instead of 1
- VIP dollars can be awarded to up to 4 organizations
- Hours and dollars allotments changed



<b>Total Volunteer Hours</b>	<b># of Organizations</b>	<b>Grant Award \$</b>
5-10 hours	Max of 1	Up to \$1,000
11-20 hours	Max of 1	Up to \$2,000
21-30 hours	Max of 2	Up to \$3,000
31+ hours	Max of 4	Up to \$5,000





# NGAB Special Impact Grant Update



- ☞ Annual Budget: \$100,000
- ☞ Focus Area: Drug Abuse
- ☞ Top 4 Organizations:
  - Adult & Teen Challenge of WI (Milwaukee, WI)
  - Ignatian Spirituality Project (Chicago, IL)
  - Phoenix Programs (Columbia, MO)
  - Renewal House (Nashville, TN)

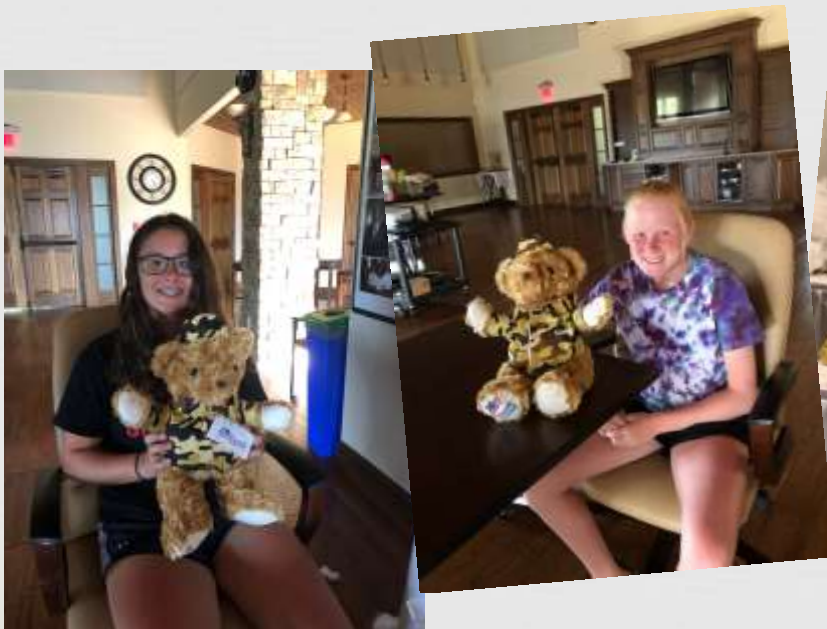
**NGAB's Mission:** The Next Generation Advisory Board exists to cultivate an understanding of philanthropy and build leadership skills in the next generations of the Tracy family. The NGAB will actively engage all generations offering opportunities, education, and support to fulfill the Tracy Family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



# Tracy Family Outreach



- 🧡 2019 Activity: Operation Gratitude
- 🧡 When: Throughout the week
- 🧡 Where: Clubhouse
- 🧡 What: Bear stuffing





# Communication

## *Instagram & E-Newsletters*



### 🍷 Instagram

#### ➤ Purpose

- ✓ To keep the family engaged and informed on the many projects TFF is working on, on the grant programs available and on the impact that both TFF and the family are having on their communities.

#### ➤ Postings

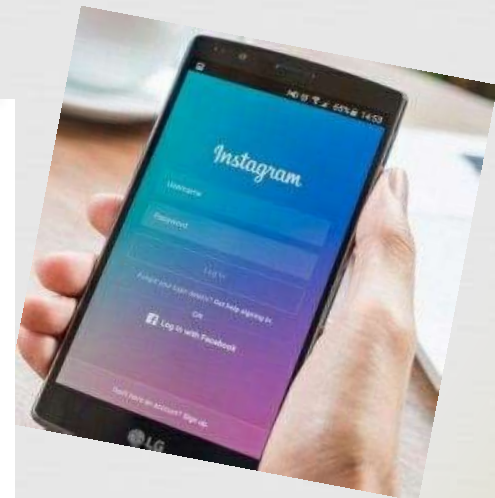
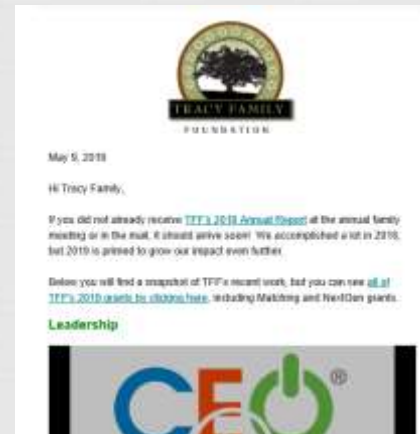
- ✓ Each month we highlight a different topic with weekly postings
- ✓ TFF Staff manages

#### ➤ Feedback

### 🍷 Quarterly E-Newsletters

- Is everyone receiving these?

**Follow us on Instagram!**  
**@TracyFamilyFoundation**





# Servember

*The 2<sup>nd</sup> annual family volunteer month*



- ❧ **Purpose:** to cultivate a philanthropic spirit in the family. We believe one of the ways to do that is to encourage the family to volunteer and serve others.
- ❧ **What & When:** volunteer in your community throughout the month of November
- ❧ **2018 Participation:** 65% participation from all generations
- ❧ **2018 Hours Volunteered:** 31+ hours

# Welcome Back 4Gs!



# NG and MG Review / Voting



One Minute Introduction of your Nonprofit





# 2018 Next Gen & Matching Grants

Total Next Gen Grants: \$92,000

Total Matching Grants: \$81,721 (personal \$) +  
\$245,163 (TFF \$) = \$326,884

**2018 Matching Grant  
Winner of \$3,000:**

Jacksonville Main Street in  
Jacksonville, IL  
*(Andrew Deuel)*

**2018 Next Gen Grant  
Winner of \$3,000:**

St. Mary School in Mt.  
Sterling, IL  
*(Kristin, Liv, Sam, Ali & Jenna  
Tracy)*



# Introduction



1. Name of the Organization
2. What do they do?
3. Why did you choose this organization?



# Group Photo



- All 3G/4Gs and Grandma
- NGAB Members