

FOUNDATION



### Annual Next Gen Ozark Meeting

August 5, 2019



# Agenda



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

- 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.
- **Walues:** Family, Faith, Education, Leadership & Community



# TFF Projects



- **Website**
- **&**Logo
- **™**Grants Management Software
- & Retreat
- Long-Range Strategic Plan





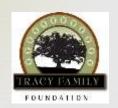
## TFF Website Update



#### & Process

- $\gt$ 7 companies  $\gt$ 4  $\gt$ 1
- ➤ Website design build, copy and photos
- Provider: Telegram Agency
- **Current status**





# TFF Logo Update





FOUNDATION



## TFF Logo Ideas



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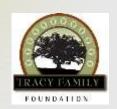


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### 2019 TFF Retreat



When: Saturday, October 19, 2019

Where: Mt. Sterling, IL





# Long Range Strategic Plan

#### **TFF Family Survey Word Cloud**



#### **TFF Grantee 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)

Arts

Human Services
Social Justice

Inequality

Hunger

Environment Children

Wellness/Health Mental Health Women & Girls



### 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>	# of Organizations	Grant Award \$
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



#### VIP Tracker

4. Organization 4

1 \$1,000 2 \$2,000 9 \$3,000 4 \$4,000

Otenviration 1

Organization 2:\_

Organization 3:\_\_

Organization 4:

Organization Navve
 Total hauss volunteered
 Staff agreture semiung volunteer hours

Total Volunteer incertive Program Dollars being Requested:

Are you requesting Volunteer Incentive Program dollars for one or multiple organizations?

Martie of Organization and Dollar Amount Requested per Organization

Tracy Family Foundation

#### Volunteer Incentive Program

Volunteer Tracker

Suggested Changes Date: May 2019 Program Originally Approved: 2016



#### Tracking Volunteer Hours

Each Tracy family member is responsible for tracking their own volunteer hours. Once the family member has completed their volunteer hours, they must send this report documenting their volunteer details to Kim Bielik (<u>Abielik Btracyfoundation.org</u>). The report must include the following information:

- · Tracy family member name
- . Dollar amount being requested from TFF
  - Must specify if the request is for one organization or multiple organizations
- · Organization(s) name
- · Organization(s) location
- . Organization(s) contact person's name
- . Organization(s) contact info
- · Dates and time volunteered
- Description of volunteer activity(s)
- · Total hours volunteer at organization(s)
- . Signature of staff person at the organization(s) verifying volunteer hours

Remember that Tracy family members can rollover volunteer hours to one following year, giving the family up to two years to volunteer and submit a request for Volunteer incentive Program dollars.

Please complete and submit the form below to Kim Bielik.

The Volunteer Incentive Program Tracker is due by December 1 each year.

	Organization	Organization	Organization	Organization	Date	Time	Volunteer Description
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Dollar Amount

Dollar Amount,

Dollar Amount



### 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.

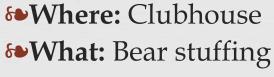


### Tracy Family Outreach



2019 Activity: Operation Gratitude

When: Throughout the week







# 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

80

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