



GREATER KANSAS CITY
COMMUNITY FOUNDATION

EXPANDING CHARITABLE HORIZONS

Charitable Investment Review

July 2, 2009

Jones Family Fund
Fund Established July 14, 2001

Confidential



Jones Family Fund

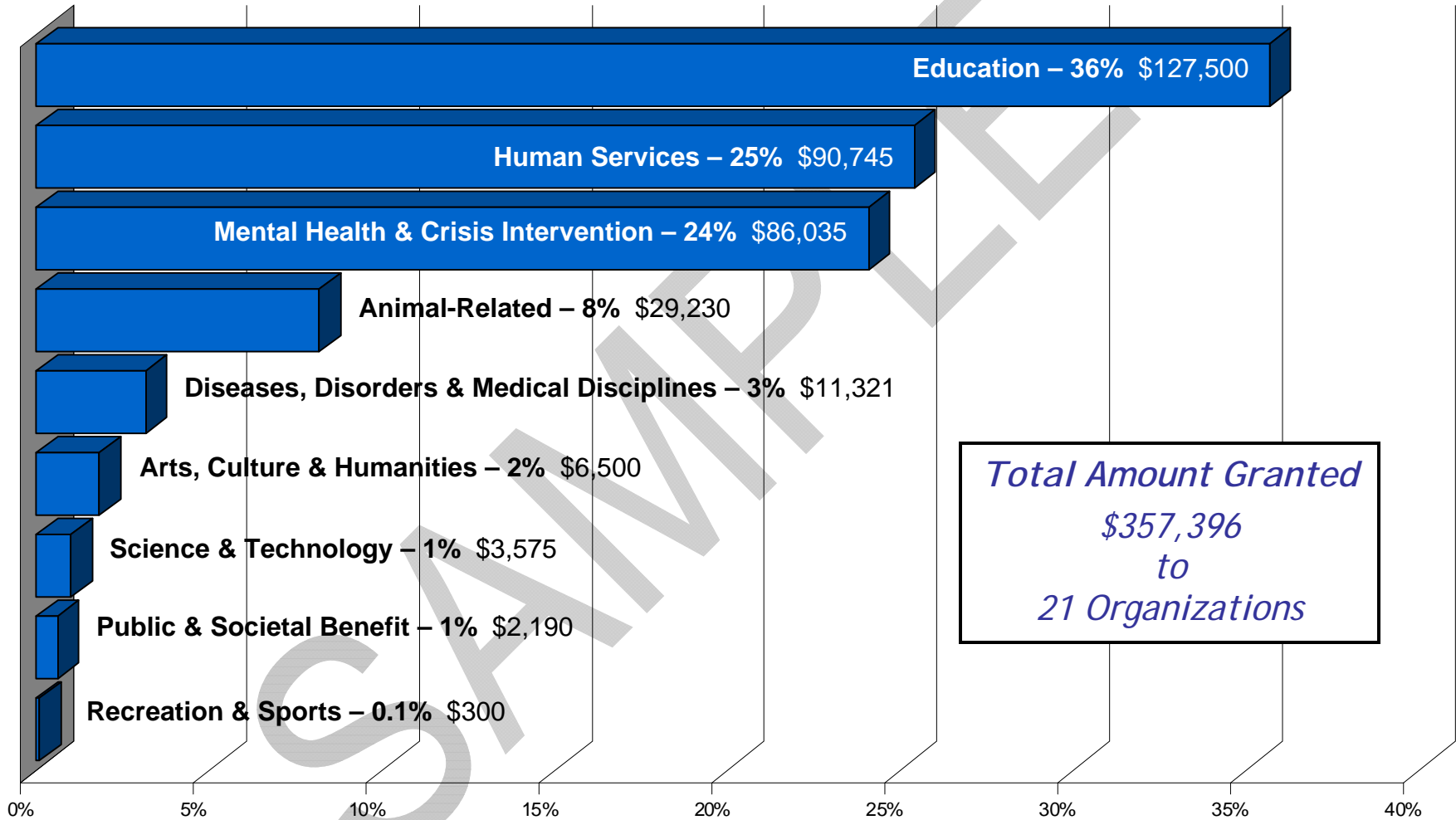
Fund History

For the Period July 14, 2001 – June 30, 2009

| | 2001 Year One | 2005* | 2006 | 2007 | 2008 | 2009 as of June 30 | Total 2001 – June 30, 2009 |
|--|------------------|------------|--------------|--------------|--------------|-----------------------|----------------------------------|
| Beginning Fund Balance | \$ - | \$ 603,039 | \$ 952,676 | \$ 1,017,214 | \$ 1,055,694 | \$ 1,077,934 | |
| Contributions | 343,379 | 357,603 | 63,673 | 73,144 | 69,171 | 11,106 | 1,532,965 |
| Investment Returns | 12 | 12,800 | 19,671 | (17,956) | (25,720) | (3,680) | (42,645) |
| Grants | - | (14,117) | (10,618) | (8,488) | (13,000) | - | (357,396) |
| Grants to Support GKCCF's Mission <i>(Fund Administrative Fees)</i> | (286) | (6,650) | (8,187) | (8,219) | (8,210) | (2,063) | (49,626) |
| Ending Fund Balance | \$ 343,105 | \$ 952,676 | \$ 1,017,214 | \$ 1,055,694 | \$ 1,077,934 | \$ 1,083,298 | \$ 1,083,298 |

*Gap in reporting years

Your Charitable Investment by Interest Area





Charitable Investment Organization Summary

July 14, 2001 – June 30, 2009

| Grantee Name | Amount | % of Total |
|--|-------------------|-------------|
| Education | \$ 127,500 | 36% |
| ✓ * Children's TLC | 75,000 | 21% |
| ✓ Midwest Center for Holocaust Education, Inc. | 50,000 | 14% |
| ✓ Kansas University Endowment Association | 2,500 | 1% |
| Human Services | \$ 90,745 | 25% |
| ✓ * Harvesters Community Food Network | 72,000 | 20% |
| ✓ Kansas City Hospice & Palliative Care | 10,000 | 3% |
| ✓ American Red Cross - Greater Kansas City Chapter | 6,195 | 2% |
| ✓ Operation Breakthrough, Inc. | 2,550 | 1% |
| Mental Health & Crisis Intervention | \$ 86,035 | 24% |
| ✓ * Gillis Center, Inc. | 86,035 | 24% |
| Animal-Related | \$ 29,230 | 8% |
| ✓ Humane Society of Greater Kansas City | 23,500 | 7% |
| Best Friends Animal Society | 5,730 | 2% |
| Diseases, Disorders & Medical Disciplines | \$ 11,321 | 3% |
| ✓ Alzheimer's Association-Heart of America Chapter | 3,511 | 1% |
| Eye Foundation of Kansas City, Inc. | 2,500 | 1% |
| American Kidney Fund | 3,885 | 1% |
| ✓ Arthritis Foundation Western Missouri/Greater KC | 1,425 | 0.4% |
| Arts, Culture & Humanities | \$ 6,500 | 2% |
| ✓ National World War I Museum at Liberty Memorial | 5,000 | 1% |
| ✓ KCPT - Public Television 19, Inc. | 1,500 | 0.4% |
| Science & Technology | \$ 3,575 | 1% |
| Kansas City Area Life Sciences Institute, Inc. | 3,575 | 1% |
| Public & Societal Benefit | \$ 2,190 | 1% |
| Disabled American Veterans Charitable Svc Trust | 2,190 | 1% |
| Recreation & Sports | \$ 300 | 0.1% |
| American Royal Association, Inc. | 300 | 0.1% |
| Grand Total | \$ 357,396 | |


✓ Indicates a nonprofit profile with reviewed status which means Community Foundation staff have reviewed this information and the profile is up to date.

* Program information provided on following pages.

Go to www.gkccf.org and click Nonprofit Search to view profiles of more than 650 local organizations.

Nonprofit Search Web Site

Go to www.gkccf.org and click Nonprofit Search


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Children's TLC


REVIEWED
BY YOUR COMMUNITY FOUNDATION

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Last Updated: 9/14/2009

Overview

- General Information
- Statements and Search Criteria
- Programs
- Management
- Governance
- Financials
- Other Documents



Children's TLC
THERAPEUTIC LEARNING CENTER

Nonprofit
Children's TLC

Address
3101 Main

Kansas City, MO 64111

Primary Phone
(816) 7560780

Primary Fax
(816) 7561677

Website
www.childrenstlc.org

Contact Email
info@childrenstlc.org

CEO
Mr. Alan Murray

Board Chair
Mr. Albert P. Mauro, Jr.

Board Chair Company
Hallmark Cards, Incorporated

Board Members
[View](#)

Year of Incorporation
1947

Former Names
Children's TLC Easter Seals (2007/6/5)
Children's TLC (2004/7/22)

Community Foundation Staff Conducted Site Visit when Developing Profile
Yes

Overview

The mission of Children's TLC is to provide therapeutic and educational services for children with disabilities in an environment, which fosters their independence and celebrates their successes.

Our vision is to become a model community of caring professionals, volunteers, and families dedicated to innovation and excellence in the education and rehabilitation of diverse children with disabilities.

Our goal is to prepare children with disabilities for successful transitions to their next educational environments.


Among our core values, we believe that:

- learning begins at birth and that all children need to be taught with kindness, respect, and compassion;
- children learn trust and respect for others, positive self-image, and initial independence through experiences addressing their individual needs;
- the needs of the child's family are equal to the child's needs and that families must be treated with respect; and
- the most effective services are provided when a collaborative relationship is established between our team of professionals and the families.

[More Background](#)

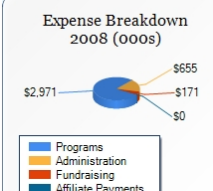
Financials

Income vs. Expense



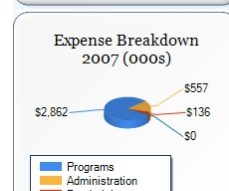
| Year | Revenue | Expenses |
|------|-------------|-----------|
| 2006 | \$2,862,000 | \$557,000 |
| 2007 | \$2,971,000 | \$171,000 |

Expense Breakdown 2008 (000s)



| Category | Amount |
|--------------------|---------|
| Programs | \$2,971 |
| Administration | \$655 |
| Fundraising | \$171 |
| Affiliate Payments | \$0 |

Expense Breakdown 2007 (000s)



| Category | Amount |
|--------------------|---------|
| Programs | \$2,862 |
| Administration | \$557 |
| Fundraising | \$136 |
| Affiliate Payments | \$0 |

Expense Breakdown 2006 (000s)




| Category | Amount |
|--------------------|---------|
| Programs | \$2,180 |
| Administration | \$393 |
| Fundraising | \$124 |
| Affiliate Payments | \$0 |

Projected Revenue
\$3,393,898


Projected Expenses
\$4,002,434

[View Financial Details](#)


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Look for this icon!

It means Community Foundation staff has reviewed this information and the profile is up to date.

www.gkccf.org

Charitable Investment Review

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Program Information

Example of one program for a grantee. Nonprofit profile includes complete organizational report which details up to five programs of the grantee. Go to www.gkccf.org and click Nonprofit Search

Children's TLC

Total Grants to Grantee: \$ 75,000

Mission

The mission of Children's TLC is to provide therapeutic and educational services for children with disabilities in an environment which fosters their independence and celebrates their successes. Our vision is to become a model community of caring professionals, volunteers, and families dedicated to innovation and excellence in the education and rehabilitation of diverse children with disabilities. Our goal is to prepare children with disabilities for successful transitions to their next educational environments.

Needs Statement

The five most pressing needs of the organization are: 1) support for early intervention services for young children with disabilities from low-income families; 2) classroom materials and therapeutic equipment; 3) professional development for special education teachers, therapists, and social workers; 4) support for family education programs that promote positive parent-child interactions; and 5) general operating support.

Early Childhood Special Education Preschool

The preschool rooms for children age two to six (2-6), are guided by an early childhood curriculum for all children that includes an emphasis on language, literacy, physical, social, cognitive, motor, and behavioral development. Therapeutic services are provided within the classroom to meet the needs of each child.

Program Short-Term Success

Children make progress toward achieving the goals identified on their individual care plans developed cooperatively by the staff and families.

Program Long-Term Success

Children are prepared to transition to the next learning environment.

Examples of Program Success

Aggregate data are analyzed to determine the percentage of children making adequate progress on their goal attainment. The most recent data suggest that 96% of the children achieved or made adequate progress toward achieving their identified objectives for each goal area. In the December 2007 Quality Rating System assessment administered by the Mid-America Regional Council, we achieved a rating of 3 stars out of a possible 4, missing a 4-star rating by only 2 points.

Gillis Center, Inc.
Total Grants to Grantee: \$ 86,035

Mission

The mission of Gillis is to help at-risk children and their families become contributing members of the community through education, counseling and social services.

Needs Statement

1. We need to replace the curriculum in our school with a modern evidence-based curriculum.
2. We need to purchase a new van in order to transport our students and residents to arts and recreation activities.
3. In this economy it is crucial that we have enough Emergency Assistance Funds to help financially crippled families get past their immediate money problems so they can get back to working on their larger problems.
4. Our Day treatment program could be even more effective in helping KC's most troubled children with the addition of after-school programming and case management services.
5. Secure funding for our Homework Zone, Music Therapy, Spiritual Life, Credit Recovery and Therapeutic Youth Employment Programs.

Residential Treatment

Gillis' Residential Treatment Program is for emotionally disturbed boys 5-18, who have experienced many difficulties including abuse, neglect, poverty, violence and abandonment. Their lives have often been filled with chaos and trauma. The Residential Treatment Program provides them with caring professionals, a safe, structured, nurturing environment and individualized treatment plans to help each boy heal and learn life skills needed to succeed at home, at school and in the community.

Program Short-Term Success

The short term goal for a child in Residential Treatment is that he can live at Gillis, free of emotional and physical abuse, in a setting where he can satisfactorily address trauma issues in order to be placed in a safe, permanent home.

Program Long-Term Success

With a vision that all children will live in emotionally stable, safe and nurturing families, the long term goal of the Residential Treatment Program is for youth, who are emotionally disturbed, with a variety of mental health diagnoses, to learn the skills necessary to achieve their full potential and grow into productive adults who can make a contribution to their community.

Examples of Program Success

Boys are referred to Gillis' Residential Treatment Program by the Children's Division of the MO Department of Social Services, Jackson County Mental Health, the MO Department of Mental Health and the Jackson, Clay, Platte and Ray County juvenile courts. The Residential Treatment Program operates at 98% capacity. The vision of Gillis is that all children will live in emotionally stable, safe and nurturing families. The current approach to effective treatment in the general residential treatment community is to provide psychotherapy to both the child and to his family, if he has one. If both the boy's behaviors and family issues are addressed simultaneously, a boy can often return to a safe home with relatives or be placed in a foster or adoptive home. Of the 64 children discharged in 2008, 56 or 91% were placed in a home setting.

Harvesters Community Food Network

Total Grants to Grantee: \$ 72,000

Mission

Hunger erodes the body and mind and wears away at our community. Children struggle to concentrate in school. Parents make desperate choices to put food on the table. Seniors compromise their already fragile health. Harvesters is the community's response to hunger. By providing food we give sustenance and hope to those in need. We also work toward long-term solutions through nutrition education, hunger awareness and advocacy.

Needs Statement

Harvesters' greatest need is financial support. To feed 60,000 individuals every week, it takes an annual budget of over \$8 million. The BackSnack program will cost \$1.4 million to provide food to 8,000 children every week; a total of over \$4 million feeds children in our community. Another \$1.4 million feeds seniors, and almost \$2 million provides nutrition education and healthy meals. In order to feed thousands every week, Harvesters also needs food donations and volunteer support.

BackSnack Program (part of the Childhood Hunger Initiative)

Harvesters BackSnack program gives school children access to good food on the weekends and during school holidays, by providing a backpack filled with nutritious food for each participating child to take home on Friday or the last day of school each week.

Program Short-Term Success

Children are fully equipped and nourished to pay attention and learn in school. Academic achievement, attendance and behavior improve because availability of food is not an issue.

Program Long-Term Success

Children learn and grow uninhibited by circumstances beyond their control. They grow up to become successful members of society who live to their fullest potential.

Examples of Program Success

In FY08, Harvesters served 650 children every week through the BackSnack program. Surveys indicate that 68% of participating teachers have seen an increase in grades and behavior, 84% have seen an increase in attendance and 77% have seen an increase in responsibility. Success of this program has led to Harvesters expanding to serve 8,000 children by the end of the 2008-2009 school year.

Donor as Funder

- Reacts to solicitation and proposals one by one
- Funds organizations and prospects they know and like
- Funds direct services, capacity building, technology, etc. using the same approach.
- Trusts that good things happen with all grants made.
- Ends with many different grants and presumed impacts.

Donor as Investor

- Clarifies charitable goals, then generates social investments to achieve it
- Investment guided by three questions:
 - What will be achieved?
 - What are the chances that achievement will happen?
 - Is this the best possible use of money?
- Clearly distinguishes among investment in programs, innovations, and organizational growth.
- Seeks verification of results for each grant made.
- Ends with coherent set of impacts from charitable investment portfolio.



Building Your Legacy Through Philanthropy Sustainable Funding Program

You can make a lasting difference in the lives of people in Kansas City and beyond. Investing in Kansas City is an investment in our future that will continue to benefit our community for generations to come. At the Greater Kansas City Community Foundation, we have partnered with many people to create sustainable funding.

Endowing the future of our community can be customized to support your favorite charitable causes and programs. These include:

- Named donor advised fund that can involve multiple generations (i.e. children, grandchildren).
- Designated named fund that you can specify one or more charities that will receive an annual grant in your name year after year. You can even name specific charitable programs within that charitable organization, including alternatives in the unlikely event those programs are discontinued sometime in the future.
- Named scholarship fund in which you specify the type of scholarship and the required qualifications awarding a scholarship. (i.e. single year or multiple years: graduate from a specific high school or geographic location; specific major; attending a specific school).
- Named field of interest fund in which you specify a charitable area of interest without naming a specific charitable organization(s). (i.e. homelessness; the arts)
- Named unrestricted fund which you specify the board of directors of the Greater Kansas City Community Foundation to determine the annual recipient(s) of the annual grants distribution from your fund. This allows the board to direct these grants to where they believe the greatest benefit and need is on a year-by-year basis.

Sustainable Funding Program

In simplest terms, a sustainable funding program requires an investment of twenty-five (25) times the annual distribution. For example, one \$5,000 annual award requires an endowment of \$125,000.

Using the Chart

Select the amount of funding to be granted annually. The corresponding figure reflects the amount of endowment assets necessary to sustain this level of annual funding.

Sustainable Investment

| Annual Funding | Endowment Needed |
|-----------------------|-------------------------|
| \$ 1,000 | \$ 25,000 |
| 2,500 | 62,500 |
| 5,000 | 125,000 |
| 10,000 | 250,000 |
| 20,000 | 500,000 |
| 50,000 | 1,250,000 |



Family Legacy Fund

Endowed Principal

Annual income distributed to each sub-fund

Potential Funding

- Current gifts
- Bequest
- Charitable remainder trusts
- Charitable lead trusts
- Retirement plans
- Life insurance
- Combinations

