



HAMILTON

COMMUNITY FOUNDATION

Aurora

Giltner

Hampton

Hordville

Marquette

Phillips

Stockham

2019

Annual

Report





Letter to Stakeholders

Friends,

We are delighted to share with you our 2019 annual report. We continue to be inspired by the enthusiasm and generosity of the donors and partners whom we are fortunate to work with. Together, we are supporting a thriving nonprofit sector that is better equipped to serve our communities.

Over the last year, we have reflected on the role we play in our community and the lasting impact we want to leave on Hamilton County. Our focus is on the following priorities:

Mobilizing Philanthropy

We work with donors inspired to support the community they love. We mobilize charitable assets and connect donors who care with causes they care about.

Operating with Excellence

To meet our goals, we must provide our donors and partners with high-quality service and engagement. We operate with the highest standards of stewardship to ensure donor funds are effectively reinvested in improving the economic and social well-being of our community.

The following pages will share the impact of how we have worked in the community to ensure that our County is safe, vibrant, and thriving for all residents. This work would not be possible without the support of our broad community of givers throughout Hamilton County. It is an honor and privilege to serve you.

Best wishes,

Tom Darbro
Board Chair



Tammy Morris, M.S.
Executive Director



Board
of
Directors
&
Officers



Front row (left to right): Asia Haack, Lori Jacobsen, Barb Bonifas, Amy Miller, Robin Hansen (Secretary), Trish Reimer (Program Officer)
Back row (left to right): Rob Anderson, Bob Cool (Vice President), Megan Vetter, Barb Olsufka, Deryl Hilligas, Jerry Robertshaw, Tom Darbro (Board President), Laura Schuster, Scott Grafton, Steve Anderson, Monte Obermeier, Tammy Morris (Executive Director). Not pictured: Pat Anderson, Myra Higgins, Emily Jasnowski (Treasurer), James Parsley, and Marlin Seeman.

2019 Highlights

- ◇ \$16.8 million in assets
- ◇ \$789k in contributions
- ◇ \$626k in grants and scholarships distributed
- ◇ 169 donors
- ◇ 154 named legacy funds
- ◇ 60% of assets are permanently endowed
- ◇ 32 names added to the Book of Memory
- ◇ 7 new named legacy funds established
- ◇ 1 new benefactor



Your Community Foundation

- ◇ Provides donors a lasting individual and family legacy for future generations
- ◇ Builds a permanent community endowment (savings account)
- ◇ Serves a broad geographic area
- ◇ Supports unlimited charitable causes
- ◇ Customizes the charitable goals of each donor
- ◇ Addresses current and emerging needs in the County

Our Stakeholders

- ◇ Fundholders and potential donors
- ◇ Nonprofits and community organizations
- ◇ Professional advisors
- ◇ Hamilton County



2019 Benefactors

Benefactors are donors who contribute an unrestricted gift of \$25,000 or more to the Foundation. Benefactors are permanently honored on an engraved donor board at the Foundation office. The Benefactors program is a wonderful way to recognize and honor donors' philanthropy while allowing the Foundation to address emerging needs in the community.

- | | |
|---|--|
| ◇ Elmer Barrick | ◇ B.K. and Norma Heuermann Foundation |
| ◇ Ruth Barrick | ◇ Ruby Hilligas |
| ◇ Ellen J. Benson | ◇ Jean L. Jemison |
| ◇ LeRoy A. Benson | ◇ Robert and Bethel Kolar Charitable Trust |
| ◇ Eva J. Bute | ◇ Catherine Newman |
| ◇ Florence C. Bute | ◇ John W. Newman |
| ◇ George C. Bute | ◇ Emma Jane Peterson Bowers |
| ◇ James R. and LaVonne Clarke Charitable Fund | ◇ Anne Peterson-Tappan |
| ◇ Lewis L. and Evelyn E. Driewer | ◇ Pinnacle Bank & Trust |
| ◇ Frank M. & Alice M. Farr Trust | ◇ David Rau III |
| ◇ John and Marlene Ferguson | ◇ Harold "Hap" Stark |
| ◇ Alma A. Hansen | ◇ Sarah Strickler-Bute |
| ◇ F. Walter Hansen | ◇ Eunice Troester |
| ◇ L.H. Hansen | ◇ Charles L. Whitney |
| ◇ Richard A. Hansen | ◇*Syd and Patty Widga |
| ◇ Eva E. Haworth | |
| ◇ John E. Haworth | * Denotes new Benefactor |

2019 Friends of the Foundation

"Friends" are donors who contributed \$10,000 or more in 2019 to the charitable efforts of the Foundation. These donors enhanced Hamilton County to include areas such as agriculture, education, community betterment and youth programming.

- ◇ Cornerstone Bank
- ◇ B.K. and Norma Heuermann Foundation
- ◇ Wilton Forsman
- ◇ Donald Schaffert Estate
- ◇ Syngenta Seeds
- ◇ Jim and LaVonne Clarke
- ◇ Frank M. and Alice M. Farr Trust
- ◇ Robert and Bethel Kolar Charitable Trust



Legacy Society

We gratefully recognize the following individuals who remembered the Foundation with a bequest from their estate or who have indicated that the Foundation has been named as a future beneficiary of their estate. These visionary donors have enriched Hamilton County through their desire to address the charitable needs of their community.

- | | |
|------------------------------|-------------------------------------|
| ◇ Albert Ackerman | ◇ Wesley C. Huenefelt |
| ◇ Nelda Akerson | ◇ Jean L. Jemison |
| ◇ Ward Andrews | ◇ Marie Johnson |
| ◇ Elmer Barrick | ◇ Lois Kreutz |
| ◇ Egdie J. Bengtson | ◇ Norma J. Kreutz |
| ◇ Ellen J. Benson | ◇ Mabel Matson |
| ◇ Eric Berggren | ◇ Myrtle Myers |
| ◇ Donald & Ingeborg Beyer | ◇ Alfred P. Nelson |
| ◇ William Bobst | ◇ Therese Nelson |
| ◇ Bertha Bremer | ◇ Zoe C. Nielsen |
| ◇ Eva J. Bute | ◇ Clifford and Gladys Olson |
| ◇ Florence C. Bute | ◇ Alta Louise Otto |
| ◇ Carl Y. Chader | ◇ Harlan and Emma Jane Peterson |
| ◇ LouAnn DeBoer | ◇ Theodore "Ted" Regier |
| ◇ Alice Eberhard | ◇ *Dr. Jeffrey D. & Melissa K. Ross |
| ◇ Julie Eriksen | ◇ *Valta Ross |
| ◇ Frank M. and Alice M. Farr | ◇ *Linda Ross-Happy |
| ◇ Esther W. Freeman | ◇ Wayne and Ethel Marie Shaneyfelt |
| ◇ Robert K. Gerloff | ◇ *Karla Smith |
| ◇ Victor C. Gustafson | ◇ Harold "Hap" Stark |
| ◇ Richard A. Hansen | ◇ Anne Peterson Tappan |
| ◇ Eva E. Haworth | ◇ Eunice Troester |
| ◇ John E. Haworth Trust | ◇ Beatrice L. Gorham Wolcott |
| ◇ Madge Haymart | |
| ◇ Henry J. Herbst | |
| ◇ Ruby Hilligas | |

*Denotes gifts that have not been realized

Become a Legacy Society Member

If you have included the Hamilton Community Foundation in your estate plan, please consider becoming a member of the Legacy Society. We would appreciate the opportunity to pay tribute to your thoughtfulness.

Book of Memory

The Book of Memory provides a thoughtful way for donors to establish a permanent tribute to the memory of a departed friend of a relative through a legacy contribution. Honoree names are recorded as a permanent legacy in the Book of Memory on display at the Foundation office.

◇ Dale Hoegh	1925-2018	◇ Melvin 'Jake' Penner	1932-2019
◇ Joan C. Kissel	1933-2019	◇ William 'Bill' Kuehner	1931-2019
◇ Merwyn Davidson	1933-2019	◇ Todd Regier	1961-2019
◇ Virginia Morgan	1927-2019	◇ Charles 'Charlie' Wilcox	1921-2019
◇ Ervin E. Schulze	1935-2019	◇ Carrolyne Wolff	1933-2019
◇ Donald Mickey	1937-2019	◇ Dr. Kenneth Treptow	1929-2019
◇ Mahlon Eck	1933-2019	◇ Eileen Forsman	1932-2019
◇ Orion 'Sarge' Collingham	1923-2019	◇ Burton 'Burt' Thomsen	1946-2019
◇ Velda Anderson	1931-2019	◇ Pauline Torgerson	1918-2019
◇ Joan Joyce Ediger	1935-2019	◇ Dorene Sorensen	1929-2019
◇ Daisy Catherine Tuttle	1925-2019	◇ Levi Moore	1986-2019
◇ Richard C. Robertshaw	1943-2019	◇ Stacia A. Larson	1943-2019
◇ Chuck Jansen	1934-2019	◇ Barbara Person	1936-2019
◇ Gerald 'Jerry' Anderson	1933-2019	◇ Wayne Griffith	1957-2019
◇ Earl Bicknase	1938-2019	◇ Petronella 'Nellie' McMahon	1926-2019
◇ Pam Karr	1948-2019	◇ Delmer Friesen	1940-2019



Named Legacy Funds

Designated Funds

- ◇ Albert Ackerman Memorial Fund
- ◇ AHS Class of 1965 Band Instrument Fund
- ◇ Sayre Borden Anderson Memorial Fund
- ◇ Art Walk Aurora Fund
- ◇ Aurora 4-R Athletics Fund
- ◇ Aurora Area Artisans Association Fund
- ◇ Eric Berggren Tree Fund
- ◇ Roe C. Black History Award Fund
- ◇ George C. and Sarah Strickler Bute Memorial Fund
- ◇ Carl Chader Memorial Fund
- ◇ Alice G. Eberhard Memorial Fund
- ◇ Thelma Clara Elkjer Memorial Fund
- ◇ William C. and Delight M. Eloie Award Fund
- ◇ First Evangelical Cemetery Association Memorial Fund
- ◇ Eileen Forsman Memorial Fund
- ◇ Hamilton Community Foundation Endowment Fund
- ◇ Hamilton County 4-H Fund
- ◇ Hamilton County Agronomy Academy Fund
- ◇ Hamilton County Ambulance Fund
- ◇ Hamilton County Family Connections Charitable Fund
- ◇ Ed and Lena Hilligas and Ruby Hilligas Memorial Fund
- ◇ Floyd Kerr and William M. Bobst Memorial Fund
- ◇ Lions Club of Aurora Charitable Fund
- ◇ Clarence and Nellie Luthy Charitable Fund
- ◇ Lillian May Charitable Fund
- ◇ Francis and Patricia McDonald Fund
- ◇ Janna Moore-Morin Memorial Fund
- ◇ Mt. Zion Cemetery Maintenance Fund
- ◇ Alfred P. Nelson Memorial Fund
- ◇ Robert E. Nielsen Memorial Fund

- ◇ Harlan and Emma Jane Peterson Fund
- ◇ Phillips Cemetery Association Fund
- ◇ Phillips Community Charitable Fund
- ◇ Donald L. Schaffert Memorial Fund
- ◇ Ralph Springer Memorial Fund
- ◇ George Western Cemetery Maintenance Fund

Donor Advised Funds

- ◇ Aurora Cooperative Charitable Fund
- ◇ Aurora School District 4R Advised Fund
- ◇ James R. and LaVonne Clarke Charitable Fund
- ◇ Carl P. and Doris J. Djernes Trust Fund
- ◇ Nadine Dunbar Memorial Fund
- ◇ Frank and Alice Farr Trust Fund
- ◇ Ronald L. and Nancy Furse Charitable Fund
- ◇ Bernard K. and Norma F. Heuermann Foundation Fund
- ◇ Heuermann Family Charitable Trust Fund
- ◇ Clayton and Myra Higgins Charitable Fund
- ◇ Phillip Hupf Charitable Fund
- ◇ Robert and Bethel Kolar Charitable Fund
- ◇ Dr. James and Mabel Woodard Charitable Fund

Scholarship Funds

- ◇ Lauren Akerson Memorial Scholarship
- ◇ Jerry and Bertina Anderson Memorial Scholarship
- ◇ Arthur H. Anderson Memorial Scholarship
- ◇ Shirley A. Andersen Memorial Teaching Scholarship
- ◇ Ward B. Andrews Memorial Scholarship for Business
- ◇ Daniel J. Armbruster Memorial Scholarship
- ◇ Aurora Baha'i Community Scholarship
- ◇ Aurora Education Association Scholarship
- ◇ Aurora High School Alumni Association Scholarship



continued.....

- ◇ Herbert and Doris Bankson Memorial Scholarship
- ◇ Gilbert "Gip" Barnell Memorial Scholarship
- ◇ Ivan M. and Agdie I. Bengtson Memorial Scholarship
- ◇ Boyd Burhoop Memorial Scholarship
- ◇ Eva J. Bute Memorial Scholarship
- ◇ Florence C. Bute Memorial Scholarship
- ◇ Dean and Pat Carriker Memorial Scholarship
- ◇ Carl Chader Memorial Scholarship
- ◇ Megan K. Christenson Memorial Scholarship
- ◇ Clark Brothers Sanitation Scholarship
- ◇ Edward and Alma Daniel Memorial Scholarship
- ◇ Alice G. Eberhard Memorial Scholarship
- ◇ Harold E. Edgerton Memorial Fund
- ◇ Thelma Clara Elkjer Memorial Scholarship
- ◇ Fred and Helen Emken Memorial Scholarship
- ◇ Bob and Carol Ernst Memorial Scholarship
- ◇ Frank M. Farr Rotary Club of Aurora Scholarship
- ◇ John and Imogene Florea Memorial Scholarship
- ◇ Eileen Forsman Memorial Scholarship
- ◇ Brent L. Furse Memorial Scholarship
- ◇ Lisa D. Garrett Memorial Scholarship
- ◇ Joan M. Gilbert Memorial Scholarship
- ◇ John Green Memorial Scholarship
- ◇ Ray A. and Frances M. Griffin Memorial Scholarship
- ◇ Hamilton Co. Jr. Pork Producers Scholarship
- ◇ Hamilton County Corngrowers Association Scholarship
- ◇ Richard A. Hansen Memorial Scholarship
- ◇ Donald P. Hanson Memorial Scholarship
- ◇ Glenn R. and Eva E. Haworth Scholarship
- ◇ John E. Haworth Scholarship
- ◇ B.K. and Norma A. Heuermann Scholarship
- ◇ Howard Holland Memorial Scholarship
- ◇ J. Walter and Thelma Hudson Memorial Scholarship
- ◇ Melvin & Virgie Hurst Memorial Scholarship
- ◇ Veedis F. (Veda) Jacobs Memorial Scholarship
- ◇ Jean L. Jemison Memorial Scholarship
- ◇ Michael Jones Memorial Scholarship
- ◇ Floyd Kerr and William M. Bobst Scholarship
- ◇ Glen R. and Margaret H. Leymaster Scholarship
- ◇ Marquette Alumni Association Scholarship
- ◇ Charles "Shorty" McDonald Memorial Scholarship
- ◇ Memorial Community Health Scholarship
- ◇ Rex and Janet Meyer Memorial Scholarship
- ◇ Mitchell's Recreation Scholarship
- ◇ David and Myrtle Myers Scholarship
- ◇ Alfred P. Nelson Scholarship
- ◇ Jeanie Nelson Memorial Scholarship
- ◇ John W. Newman Memorial Scholarship
- ◇ Donald A. Nielsen, Betty Lou Nielsen and Robert L. Nielsen Memorial Fund
- ◇ Karen Louise Nielsen Wilcox Memorial Scholarship
- ◇ Orville and Dee Nielsen Memorial Scholarship
- ◇ Kenneth and Lucille Nyblom Teaching Scholarship
- ◇ Mae Gunnarson Olson P.E.O. Scholarship
- ◇ Alta Louise Otto Memorial Scholarship
- ◇ Harlan and Emma Jane Peterson Scholarship
- ◇ Phillips Community Scholarship
- ◇ John F. and Mary A. Quinn Scholarship
- ◇ Dick Regier Memorial Scholarship
- ◇ Ted and Marjorie Regier Fund
- ◇ Todd Alan Regier Memorial Scholarship
- ◇ Blanche M. Ross Memorial Scholarship
- ◇ Cindy Ross Memorial Scholarship
- ◇ Betty Grosvenor Saunders Scholarship in Education
- ◇ J. Michael Saxton Memorial Scholarship
- ◇ Ethel M. Shaneyfelt Nursing Scholarship
- ◇ John H. and Edith Pratt Stauffer Memorial Scholarship
- ◇ Dr. Edmund A. Steenburg Memorial Scholarship

- ◇ Alvin and Rose Marie Stranberg Memorial Scholarship
- ◇ Annita Kay Thomas Memorial Scholarship
- ◇ John G. Thomas Memorial Scholarship
- ◇ Dale E. Traudt Memorial Scholarship
- ◇ Clarence Trumble Memorial Scholarship
- ◇ Marie Vetter Memorial Scholarship
- ◇ Delmer Wadell Memorial Scholarship
- ◇ Wilbur H. Weedon Scholarship
- ◇ Clifford Williams Memorial Scholarship
- ◇ Genevieve and Robert Willis Scholarship
- ◇ Dr. James and Mabel Woodard Scholarship
- ◇ Clair “Shorty” Zehr Memorial Scholarship

Unrestricted Funds

- ◇ Elmer and Ruth Barrick Memorial Fund
- ◇ LeRoy and Ellen Benson Charitable Fund
- ◇ Donald and Ingeborg Beyer Charitable Fund
- ◇ Book of Memory Fund
- ◇ George C. and Sarah Strickler Bute Memorial Fund
- ◇ Hamilton County Charitable Fund
- ◇ Richard A. Hansen Memorial Fund
- ◇ Glenn R. and Eva E. Haworth Memorial Fund
- ◇ John E. Haworth Fund
- ◇ Ed and Lena Hilligas and Ruby Hilligas Memorial Fund
- ◇ Jean L. Jemison Memorial Fund
- ◇ Edith M. Luthy Memorial Fund
- ◇ Therese C. Nelson Memorial Fund
- ◇ Harlan and Emma Jane Peterson Fund
- ◇ Simeon Louis Stark and Eva M. Stark Charitable Fund
- ◇ Anne Peterson Tappan Memorial Fund
- ◇ Eunice Troester Memorial Fund



How to Create Your Legacy

Add to an Existing Fund

Make an Ouirght Gift

- Gifts of cash, stocks, bonds, real estate, grain or other assets

Create Your Legacy Fund (Fund options below)

- Unrestricted Fund
- Designated Fund to a specific charity(s)
- Donor Advised Fund
- Field of Interest Fund (animal welfare, arts & humanities, community enrichment, education, human services, youth development)

Start an Incubation Fund

- An initial gift of \$12,500 to establish an endowed fund
- Must accumulate \$5000 in five years

Specify a Bequest by Will or Trust

- Designate a gift or portion of your estate
- Become a Legacy Society member

Establish a Charitable Gift Annuity

- Gift of cash or property
- Immediate tax benefits
- Fixed quarterly or annual income payments

Establish a Chritable Remainder Trust

- Place cash or property in a trust
- Trust will pay annual income to the donor for life or a fixed number of years.

Name a Life Insurance Designation

- Name HCF as the owner and/or designated beneficiary or partial beneficiary of a life insurance policy
- These gifts can reduce estate and income taxes

Direct a Retirement Plan Distribution

- Donors can give all or a portion of a retirement plan account
- Those over the age of 70 1/2 can make completely tax-free gifts transferred from traditional IRA and Roth IRA accounts without paying estate or income taxes

The Foundation specializes in customizing your philanthropic goals. See your professional advisor(s) to choose the options that work best for you and your family. Please notify us if you and/or your advisor would like to visit with a Foundation representative during the planning process.



Bob Leach and Dwight Wilcock receive a Quilt of Valor done by the Nimble Thimble Quilt Guild, made possible through a grant from HCF.

HCF provided a grant to the Merrymakers for this performance by singer, Joe Taylor, for residents at Memorial Community Care.



2019

Consolidated Statement of Financial Activity

Year End December 31	2019	2018
Assets	\$16,853,918	\$15,459,910
Liabilities	\$198,339	\$197,642
Net Assets	\$16,657,579	\$15,272,268
Total Liabilities & Net Assets	\$16,853,918	\$15,459,910

Consolidated Statement of Financial Position

Year End December 31	2019	2018
Revenue and Support	\$1,090,858	\$1,249,321
Expenses	\$812,314	\$752,104
Change in Net Assets	\$278,544	\$49,217

Audit by Almquist, Maltzahn, Galloway & Luth, P.C.

Celebrating 10 Year Anniversary

William C. and Delight M. Eloe Award for Inspirational Academic Leadership

The family of William C. and Delight M. Eloe established this award in memory of their parents who were passionate about education. When William Eloe fell ill, it was the Aurora Public Schools “family” who provided support to Delight as she raised her children. This endowed award was established in appreciation for the support provided to them by the Aurora Public Schools.

The \$1000 award is presented annually to an Aurora Public Schools teacher or administrator who demonstrates exceptional classroom teaching effectiveness; administrative professionalism; professional growth; and/or public relations with students, parents, peers, alumni, and other constituents.



Shari Krejci, 2019 William and Delight Eloe Award for Inspirational Academic Leadership Recipient, is pictured with the Eloe family. Pictured from left to right: Paul Eloe (grandson), Howard Eloe (son of Howard and Delight), Shari Krejci and Beth Eloe-Reep (granddaughter).

William C. “Bill” Eloe was the high school coach and YMCA director in Aurora during the early 1900s. He coached the first AHS team to earn a state championship (Class F basketball) in 1920. William was also a founding member of the Aurora Rotary Club.



Delight M. Eloe started teaching grades 3 and 4 at South Elementary School in Aurora in 1928 and retired as principal of West Elementary School in 1958. During that time she cared for an invalid husband, raised five children, and maintained her community and church leadership activities.



HAMILTON
COMMUNITY FOUNDATION

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