



*We exist to support and promote outstanding opportunities through recreation for children and adults with disabilities in cooperation with Northwest Special Recreation Association.*

Regular Meeting  
**January 16, 2018 - 3:30 p.m.**  
Park Central Conference Room  
3000 W. Central Road, Rolling Meadows, IL

### **AMENDED AGENDA**

- I. Call to Order  
Roll Call
- II. Introduction of Guests:
  - A. None
- III. Approval of Agenda
- IV. Approval of Minutes: - Pages 3-8
- V. Correspondence
  - A. Written
  - B. Oral
- VI. Reports: - Pages 9-38
  - A. SLSF Reports – 2017 YE
    1. Events – Wrap Up
      - a. 2017 Actual vs. Budget
      - b. Celebrate Ability Gala
    2. Grants
    3. Sponsor Progress Report
    4. 2017 4<sup>th</sup> Quarter Goals
    5. Annual Appeal Fund 2017
    6. Giving Comparison
    7. NWSRA Scholarship Report
    8. Year End Financial Wrap-up
  - B. Marketing and Public Relations Report
  - C. NWSRA Program Report
  - D. NWSRA Lightning Booster Club – Oral Report
- VII. Review of Financial Statements/Investments: - Pages 39-55
  - A. SLSF Investment Update
  - B. Organizational Cash Overview
  - C. SLSF Budget vs. Actual
  - D. Balance Sheets
  - E. 4<sup>th</sup> Quarter Financial Report
  - F. Other

- VIII. Approval of Warrant: - Pages 56-60
  - A. Motion to approve Warrant #11 - \$50,669.40
  - B. Motion to approve Warrant #12 - \$122,362.66
  
- IX. Old Business:
  - A. Pursuit Update
  - B. Snoezelen Room Update
  
- X. New Business: - Pages 61-69
  - A. Installation of Officers
    - 1. Jim Houser – Chairman
    - 2. Kathy Nowicki – Vice Chairman
    - 3. Amy Charlesworth – Secretary/Organizational Treasurer
  - B. Recognition of Board Members:
    - 1. Carl Arthur – Outgoing Board Chairman
  - C. Installation of New Board Members:
    - 1. None
  - D. Approval of Terms and Committees
  - E. Legal:
    - 1. Appointment of Legal Counsel - Robbins, Schwartz, Nicholas, Lifton & Taylor, Ltd. – Heidi Katz
    - 2. Resolution R2018-4 – Change of Registered Agent
  - F. Appointment of President – Tracey Crawford – Resolution R2018-3
  - G. Approval of Resolutions:
    - 1. Resolution R2018-1 Benjamin F. Edwards & Co.
    - 2. Resolution R2018-2 Village Bank and Trust
  - H. Motion to approve Warrant #1 - \$4,242.94
  - I. Annual SLSF Investment Transfer
    - 1. None
  
- XI. Information/Action Items: Pages 70-103
  - A. Proposed Budget 2018
  - B. 2018 Goals and Strategies
  - C. SLSF Board Meeting Calendar
  - D. 2018 Event Calendar
  - E. Board Member Annual Review Form 2017 – Oral
  - F. Conflict of Interest Policy & Annual Statement
  - G. Other
  
- XI. Comments
  
- XII. Adjournment

**Mission Statement**

We exist to support and promote outstanding opportunities through recreation for children and adults with disabilities in cooperation with the Northwest Special Recreation Association

# IV. Minutes

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**MINUTES OF THE REGULAR MEETING OF THE BOARD OF DIRECTORS OF  
THE SPECIAL LEISURE SERVICES FOUNDATION  
HELD AT THE NWSRA ADMINISTRATIVE OFFICES  
3000 W. CENTRAL ROAD, ROLLING MEADOWS, IL  
ON THE 17<sup>th</sup> OF OCTOBER 2017**

Director Houser called the meeting to order at 3:30 p.m. Those present were Carl Arthur, Tom Campone, Amy Charlesworth, Al Crook, Anthony Gattuso, Jim Houser, Kathy Nowicki, Terri Oates, Tom Perkins, Brian Rubin, Jonathan Salk, and Christina Ferraro.

Absent were: Vicki Carney, Jacky Cartwright, Mike Clark, Rita Fletcher, Dennis Hanson, Dennis Stein

Wendy Aguilera Blanchette arrived at 3:37 p.m.

Also present were: Tracey Crawford, SLSF President; Nanette Sowa, Superintendent of Development; Brian Selders, Superintendent of Communications and IT; Andrea Griffin and Jayne Finger, Superintendents of Recreation; Trisha Breitlow, Superintendent of Administrative Services; Cathy Splett, Foundation Coordinator; Miranda Woodard, Accounting Manager, Karyn Emeraldal, Graphic Communications Coordinator; Megan O'Brien, Events Coordinator; and Jessica Vasalos, Administrative Coordinator as recording secretary.

Superintendent Selders introduced Karyn Emeraldal, Graphic Communications Coordinator. Superintendent Sowa introduced Dave Hanson, Benjamin F. Edwards and Wendy Aguilera Blanchette, potential Board Member.

Approval of Agenda for October 17, 2017

Director Houser called for a motion to approve the Agenda for October 17, 2017. Director Charlesworth moved the motion and Director Oates seconded the motion. Upon voice vote the motion carried.

Approval of Minutes, May 16, 2017

Director Houser called for a motion to approve the minutes for the May 16, 2017 meeting. Director Arthur moved the motion and Director Perkins seconded the motion. Upon voice vote the motion carried.

Correspondence

Written: President Crawford reported that a letter was received from IAPD. She and Superintendent Sowa attended the Best of the Best awards Gala. SLSF nominated Ala Carte Entertainment for an award and they won.

Oral:

None

SLSF Reports

3<sup>rd</sup> Quarter Reports –

Events

Superintendent Sowa reported that all the golf outings are completed. Overall the Golf Outings were successful and made special mention that the Moretti's Golf Outing grossed \$30,000. This was the 30<sup>th</sup> anniversary of the event. The event has raised almost \$1 million since its inception. Celebrate Ability is the next event and it is expected to net more than last year.

### Grants

Cathy Splett, Foundation Coordinator reviewed the grant activity and informed the Board that there are still grants outstanding and hopes to hear the status of them soon. Coordinator Splett also informed the Board of a generous grant that has been awarded to SLSF to assist with the startup costs start Pursuit 3.

### Sponsorships

Superintendent Sowa reviewed the Sponsorships. To date SLSF has raised \$69,300 in sponsorships.

### Goals

Superintendent Sowa reviewed the progress of the SLSF goals for 2017.

### Marketing & Public Relations

Brian Selders, Superintendent of Communications and IT, demonstrated a new system and features on the website, such as the Donate Now button. People can create their own fundraisers and make donations through Facebook. Donations can be made for special occasions, such as birthdays, and testimonials can be added.

### NWSRA Program Report

Jayne Finger, Superintendent of Recreation, highlighted the sports banquet held to celebrate NWSRA athletes with dinner provided by Moretti's. The Booster Club provided hats and pins to each athlete.

### Financial Reports

#### Organizational Cash Overview

Superintendent Breitlow reviewed the financial report. Reserves are higher than 2016. Revenue is slightly ahead. Expenses are on target.

Miranda Woodward, Accounting Manager, distributed a correction to the September 30 2017 Cash Overview.

### Approval of Warrants

Director Houser called for a motion to approve Warrant #6 dated June 30, 2017 in the amount of \$305,404.05. Director Arthur moved the motion and Director Charlesworth seconded the motion. Upon roll being called the vote was as follows:

AYE: Carl Arthur, Tom Campone, Amy Charlesworth, Al Crook, Anthony Gattuso, Jim Houser, Kathy Nowicki, Terri Oates, Tom Perkins, Brian Rubin, Jonathan Salk, and Christina Ferraro.

NAY: None

The motion carried.

Director Houser called for a motion to approve Warrant #7 dated July 14, 2017, in the amount of \$10,989.19. Director Oates moved the motion and Director Arthur seconded the motion. Upon roll being called the vote was as follows:

AYE: Carl Arthur, Tom Campone, Amy Charlesworth, Al Crook, Anthony Gattuso, Jim Houser, Kathy Nowicki, Terri Oates, Tom Perkins, Brian Rubin, Jonathan Salk, and Christina Ferraro.

NAY: None

The motion carried.

Director Houser called for a motion to approve Warrant #8 dated August 31, 2017 in the amount of \$159,126.87. Director Charlesworth moved the motion and Director Arthur seconded the motion. Upon roll being called the vote was as follows:

AYE: Carl Arthur, Tom Campone, Amy Charlesworth, Al Crook, Anthony Gattuso, Jim Houser, Kathy Nowicki, Terri Oates, Tom Perkins, Brian Rubin, Jonathan Salk, and Christina Ferraro.

NAY: None

The motion carried.

Director Houser called for a motion to approve Warrant #9 dated September 30, 2017 in the amount of \$12,367.90. Director Crook moved the motion and Director Charlesworth seconded the motion. Upon roll being called the vote was as follows:

AYE: Carl Arthur, Tom Campone, Amy Charlesworth, Al Crook, Anthony Gattuso, Jim Houser, Kathy Nowicki, Terri Oates, Tom Perkins, Brian Rubin, Jonathan Salk, and Christina Ferraro.

NAY: None

The motion carried.

Director Houser called for a motion to approve Warrant #10 dated October 17, 2017 in the amount of \$68,834.83. Director Oates moved the motion and Director Perkins seconded the motion. Upon roll being called the vote was as follows:

AYE: Carl Arthur, Tom Campone, Amy Charlesworth, Al Crook, Anthony Gattuso, Jim Houser, Kathy Nowicki, Terri Oates, Tom Perkins, Brian Rubin, Jonathan Salk, and Christina Ferraro.

NAY: None

The motion carried.

#### Old Business

Cathy Splett, Foundation Coordinator, reported that the final payment for the Hanover Park Park District ramp was made on August 29. The ramp is beautiful and allows the community center a level of access that it did not have previously.

#### New Business

Director Houser called for a motion to approve Wendy Aguilera Blanchette as a new board member. Director Perkins moved the motion and Director Arthur seconded. Upon roll being called the vote was as follows:

AYE: Carl Arthur, Tom Campone, Amy Charlesworth, Al Crook, Anthony Gattuso, Jim Houser, Kathy Nowicki, Terri Oates, Tom Perkins, Brian Rubin, Jonathan Salk, and Christina Ferraro.

NAY: None

#### Celebrate Ability

Superintendent Sowa reminded the Board that Celebrate Ability is November 3, 2017. A few more registrations are needed. Money from the IMPACT Auction will go to the Snoezelen Room in Hanover Park. Superintendent Sowa is asking for donations for the Bucket of Cheer.

#### NWSRA Grant

Superintendent Finger reported that the second of three requests of funds from SLSF to support NWSRA is in the amount of \$68,546.83 to support scholarships, general programs, inclusion, transportation and athletics.

#### Snoezelen Room

President Crawford and Superintendent Griffin reported on the status of the Snoezelen Room. A video of the Snoezelen Room was shown. The room has been open for nine months. There are currently 45 clients. Nine family members joined the sessions. The room started with utilization of three days a week and is now up to six days a week. It is fully booked and there is a wait list. The Snoezelen Room services a wide range of ages and ability levels. There are 6 trained therapists. Awareness of the Snoezelen Room and its benefits are extending beyond NWSRA's districts. The Snoezelen Room is being advertised and used as a model by other organizations. The room will be seen via Virtual Reality at Celebrate Ability.

President Crawford informed the Board that parents have been talking about starting a GoFundMe for the Snoezelen Room.

#### Wheaton Sisters Grant

SLSF applied for a grant to open PURSUIT 3 and were awarded a generous amount by the Wheaton Franciscan Sisters. The money will go for the first year's rent, accessibility, technology and supplies. SLSF can apply for a grant again in 2018.

#### Benjamin F. Edwards Investment Update

Dave Hanson presented the status of the SLSF portfolio. SLSF has received a good return on investments and the portfolio is nicely balanced. Overall the economy is good. There has been a slow and steady increase in interest rates which will benefit the portfolio.

#### Information/Action Items

##### Holiday Luncheon

Nanette Sowa, Superintendent of Development, announced that invitations to the Holiday Luncheon will be mailed out soon. It will take place on December 13, 2017. Approximately 150 – 200 typically attend.

##### 2018 Board Meeting Schedule

President Crawford will send the board meeting schedule via the Outlook calendar invite. At the SLSF retreat, the SLSF team created the 2018 goals from the development plan. The goals will be available in January. Some of those goals have already been completed. Monthly meetings will keep the team on

target. The main areas of focus are: hire and Event Coordinator (completed), grants (have another organization do the research), and additional direct mailings to raise money.

Director Charlesworth announced that President Crawford was selected by Rolling Meadows Rotary as the Community Leader of the Year.

Adjournment

Being no further business to come before the Board, Director Houser called for a motion to adjourn the meeting at 4:42 p.m. Director Oates moved the motion and Director Perkins seconded the motion. Upon voice vote the motion carried.

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Secretary

# VI. Reports

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# 2017 Actual Vs. Budget

Events		2017	Budget	Income to Expense Ratio
<b>Gold Medal Fashion Show</b>	Gross	\$ 57,709.10	\$ 60,630.00	62%
	Expense	\$ 22,261.16	\$ 20,000.00	39%
	Net	<b>\$ 35,447.94</b>	<b>\$ 40,630.00</b>	
	# attending	557		
	cost per person	\$ 39.97		
<b>Buffalo Grove Classic</b>	Gross	\$ 30,889.00	\$ 29,700.00	83%
	Expense	\$ 5,320.62	\$ 7,350.00	17%
	Net	<b>\$ 25,568.38</b>	<b>\$ 22,350.00</b>	
	# attending	95		
	cost per person	\$ 56.01		
<b>Palatine Hills Golf Classic</b>	Gross	\$ 25,778.00	\$ 28,300.00	77%
	Expense	\$ 5,901.92	\$ 7,280.00	23%
	Net	<b>\$ 19,876.08</b>	<b>\$ 21,020.00</b>	
	# attending	99		
	cost per person	\$ 59.62		
<b>Moretti's/NWSRA Golf Classic</b>	Gross	\$30,070.00	\$ 25,960.00	87%
	Expense	\$3,909.43	\$ 4,600.00	13%
	Net	<b>\$ 26,160.57</b>	<b>\$ 21,360.00</b>	
	# attending	127		
	cost per person	\$ 30.78		
<b>Women's Only Outing</b>	Gross	\$ 19,172.00	\$ 19,000.00	62%
	Expense	\$ 7,274.72	\$ 5,566.00	38%
	Net	<b>\$ 11,897.28</b>	<b>\$ 13,434.00</b>	
	# attending	81		
	cost per person	\$ 89.81		
<b>Arlington Classic</b>	Gross	\$ 27,114.00	\$ 29,650.00	92%
	Expense	\$ 2,186.23	\$ 3,280.00	8%
	Net	<b>\$ 24,927.77</b>	<b>\$ 26,370.00</b>	
	# attending	94		
	cost per person	\$ 23.26		
<b>T&amp;M Golf Outing</b>	Gross	\$ 18,540.00	\$ 16,398.00	79%
	Expense	\$ 3,955.56	\$ 4,355.00	21%
	Net	<b>\$ 14,584.44</b>	<b>\$ 12,043.00</b>	
	# attending	36		
	cost per person	\$ 109.88		
<b>Celebrate Ability</b>	Gross	\$ 97,005.00	\$ 86,800.00	68%
	Expense	\$ 30,659.24	\$ 31,650.00	32%
	Net	<b>\$ 66,345.76</b>	<b>\$ 55,150.00</b>	
	# attending	258		
	cost per person	\$ 118.83		
<b>Totals</b>	Gross	\$ 306,277.10	\$ 296,438.00	73%
	Expense	\$ 81,468.88	\$ 84,081.00	27%
	Net	<b>\$ 224,808.22</b>	<b>\$ 212,357.00</b>	

After Event Memo:

To: Tracey

From: *Nanette Sowa*

Event Name: Celebrate Ability Gala

Event Date: November 3, 2017

**Event History:** The Gala started in 1993 as the Special Olympics Awards and Recognition Dinner. Through the years it has morphed from an awards dinner to a Fundraising Gala, the highest grossing fundraising event of the SLSF year.

**# of years event held:** The Gala has been held for 24 years.

**Event Explanation:** The Gala consists of a dinner that includes a silent auction, a motivational speech or video from a participant or their family or a NWSRA Staff member followed by an Impact Auction. The funds raised in the Impact Auction are for whatever specific cause was addressed by the speech given by the participant. Another raffle is held at the Gala called the "Bucket O'Cheer" which consists of alcoholic beverages donated by NWSRA and SLSF board members, NWSRA staff and the gala committee members. The winner takes home an entire 16 foot table's worth of beverages, cocktail napkins and other assorted bar equipment.

There is an opportunity for donors to purchase Celebrate Ability raffle tickets from April until the day of the Gala for \$100/each. A monthly drawing is held which awards the winner \$100 and then the winning ticket is returned to the raffle drum to be eligible for all future monthly drawings as well as the drawing on the evening of the Gala where the prizes range from \$500-\$3000. No tickets for this raffle are sold at the Gala.

**Event Preparation:** The Gala committee begins meeting in April to plan the November event. However, the committee members are gathering ideas all year long from one Gala to the next. Letters for donations for the silent auction are sent in April as are the Celebrate Ability Raffle tickets. The President of the Foundation meets with the Superintendent of Development in March to decide what need the Impact Auction will address. The Superintendent of Marketing and Communications begins to create a marketing plan and visuals to address that need on the website and to be shown at the Gala. In 2017, the monies from the Impact Auction were earmarked to create a Snoezelen Room at the Hanover Park PURSUIT.

Invitations are mailed no later than the second week of September. The Superintendent of Development begins contacting sponsors in March. Sponsor tables make up the majority of attendees. Programs are printed which highlight the events of the evening as well as advertisements from the sponsors. The ticket price was raised to \$125/person to accommodate a premium open bar. The Emerald Table price was raised to \$1,500 and the Ruby Table was eliminated.

In 2017, the committee decided again to use a mobile bidding platform, Gesture, Inc. In July a contract was signed with Gesture, Inc. The mobile bidding eliminated the need to print the silent auction items in the program and also allowed people to bid from offsite. The use was a success as the guests enjoyed

being able to stay at their table and bid, knowing when someone had bid more than them, etc. Using the service also added an additional expense of \$3700 to the event. The service paid for itself in increased bids. The committee decided to add paddles to raise for the Impact Auction which brought additional excitement to this aspect of the night.

On the morning of the Gala, the committee meets at the venue to set up the silent auction table displays and to distribute the programs and paddles on the tables. Kim Lichtenberger, a professional designer, brings décor and props to decorate the silent auction tables and room.

**Committee Names:** The 2017 Gala Committee included:

Carl Arthur                      Terri Oates                      Marge Janovics                      Beth Anne Ausnehmer  
 Nuala Gewargis                      Maureen Kerrigan                      Kim Lichtenberger

**Actual day of explanation:**

Day of to do		
	<b>DUTY</b>	<b>WHO</b>
1	Arrive at Traditions of Chevy Chase 10:00 a.m.	all
2	Table count and check seats. Place Wheelchair cards at appropriate seats	CS
3	Take things out of Hunt Room and place on tables	NS, Comm
4	Put Certificates in clear frames	MO
5	Decorate Tables as needed	Comm
8	Place programs on tables and paddles on chairs	NS, Comm
9	Plaques on appropriate tables with stands	MO, Comm
10	Set up registration	CS
11	Set cashier information under registration tables	CS
12	Set up Bucket o' Cheer	Comm
13	Set up and check AV	BS
14	Arrive back to the venue no later than 4:30	NS/CS/MO
15	Greet Volunteers and familiarize them with their duties, and introduce them to who they are working with	MO
16	Event runs	ALL
17	Clean up after event, load van	ALL
18	Unload on Monday morning	NS/CS/MO
19	Count money, do all follow-up on Monday after event until week of Thanksgiving when all should be finished	NS/MO
20	Hold evaluation meeting with the committee in December or January	NS/MO

**Evaluation responses: Meeting to be held in December 2017 or January 2018.**

**Target Numbers:** Budget is on left/actual on right.

Target #	2015	2016	2017
<b>Gross Revenue</b>	\$114,050/\$88,975	\$87,200/\$87,216	\$87,000/\$97,005
<b>Expenses</b>	\$26,050/\$24,928.95	\$25,534/\$28,662.33	\$26,450/\$30,691.22
<b>Net Revenue</b>	\$88,000/\$64,046.05	\$61,666/\$58,453.67	\$60,550/\$66,313.78
<b>Registrations</b>	\$35,000/\$25,900	\$25,000/\$25,477.50	\$25,000/\$33,375
<b>Sponsorships</b>	\$15,000/\$10,700	\$12,000/\$15,500	\$12,000/\$8,000
<b>Silent Auction</b>	\$10,000/\$11,210	\$10,000/\$13,631	\$10,000/\$15,490
<b>Bucket O'Cheer</b>	\$2600/\$2545	\$2000/\$2020	\$2,000/\$2,440
<b>Attendance</b>	277	260	258
<b>Impact Auction</b>	\$35,050/\$23,110	\$20,000/\$20,812.50	\$20,000/\$23,575
<b>Cel. Abil. Raffle</b>	\$16,400/\$11,100	\$18,000/\$9400	\$18,000/\$9,600
<b>SLSF cost person – (total expenses/attendance)</b>	\$90/person	\$111/person	\$119/person

### **Evaluation**

The 2017 Gala was truly a Gala. The décor was exciting, more guests than ever stayed to dance to Monster Entertainment and the mobile bidding eliminated the lines at check-out. Adding paddles to this year's Impact Auction helped add some excitement to this portion of the evening. The committee and the SLSF team will solicit more donors for the Bucket o' Cheer next year, especially getting donations of the fun items, napkins, wine and bar accessories, etc. Next year SLSF will purchase paddles instead of hand making them. The SLSF team will also continue soliciting additional sponsors. Finally the committee and the SLSF team will begin to think of exciting things to add to next year's 25<sup>th</sup> Anniversary Gala.

## Board Report - Grant Activity for 2017

The following is a list of 2017 grant activity on behalf of SLSF/NWSRA

<b>Illinois Department of Transportation –</b> IDOT grants vehicles to non-profit agencies through the Paratransit Vehicle Program.	Accessible Vehicle	\$ 63,000.00		NWSRA submitted a grant application for one 14 passenger vehicle to the Illinois Department of Transportation (IDOT) on 6.28.2017.
		<b>Total Government Grant Money Received in 2017</b>		<i>The 2016 approved IDOT vehicle was delivered in October. Still waiting to hear about the 2017 approval.</i>

### Private Grants

<b>Pending</b>				
Name	Purpose	Amount Requested	Status	Notes
PayPal Gives	PURSUIT - iPads	\$ 5,000.00	pending	SLSF submitted a grant for the purchase of 13 iPads, 13 Otterbox case and misc. Apps to be used at the PURSUIT Program. Submitted on 9.5.2017
Palatine Township	Inclusion	\$ 10,000.00	Pending	SLSF submitted the 2018-2019 application to request funds to be directed towards Inclusion on 9.20.2017
Circle of Service Foundation	Hanover Park Sensory Room	\$ 5,000.00	Pending	SLSF submitted a Pre-Application to request funds to purchase items for the sensory room at the HP NWSRA Programming Space. Submitted on 12.5.2017 - Invited to apply in 2018.
<b>Not Approved</b>				
Frontier Days - Distribution of Funds	Sensory Room	\$ 2,000.00	Not Approved	SLSF submitted the application to request funds (ranging from \$2,000 - \$14,000) to help purchase items for the Hanover Park Sensory Room on 9.27.2017. Received notification on 11.6.2017
Rotary Club of Arlington Heights	General Program Support	\$ 620.00	Not Approved	SLSF sent the application to request funds to be directed towards the NWSRA Horseback Riding Program on 4.28.2017. "Grant committee didn't feel the proposal outlined exactly what they were looking for at this time." 6.2.2017

## Board Report - Grant Activity for 2017

The following is a list of 2017 grant activity on behalf of SLSF/NWSRA

Approved				
Rotary Club of Palatine	Athletics	\$ 1,035.00	\$1,035.00	SLSF sent the allocation application to request funds to purchase Bocchia equipment needed for the athletes on 1.12.2017. Will receive check on 3.10.2017
Elk Grove Township	Inclusion	\$ 7,000.00	\$10,000.00	SLSF sent the application to request funds to be directed towards Inclusion on 2.2.2017. Received contract on 5.5.2017
Zurich NA	Accessible Vehicle	\$ 15,000.00	\$15,000.00	SLSF sent the application to request funds to help purchase an accessible vehicle on 2.17.2017. Received check on 5.8.2017
Rotary Club of Rolling Meadows	General Program Support	\$ 650.00	\$650.00	SLSF sent the application to request funds to be directed towards the purchase of 2 recumbent bikes on 4.24.2017. Accepted, will received the check on 6.12.2017
Women's Club of Inverness	General Program Support	\$ 1,040.09	\$1,040.00	SLSF sent the application to request funds to purchase music instruments on 3.3.2017. Received check on 5.15.2017
Rotary Club of Elk Grove Village	Scholarships	\$ 2,000.00	\$1,000.00	SLSF sent the application to request funds for Day Camp Scholarships on 1.31.2017
Palatine Township	Accessible Vehicle	\$ 10,000.00	\$10,000.00	SLSF requested funds to help purchase an accessible vehicle on 9.12.2016. Received approval on 6.22.2017 for 2017-2018
Allstate Foundation	General Program Support	\$ 1,000.00	\$480.00	SLSF sent the application to request funds for General Program support through the Community Volunteer Program on 5.15.2017
Rotary Club of Buffalo Grove	Accessible Vehicle	\$ 1,000.00	\$1,000.00	SLSF sent the application to request funds to help purchase an accessible vehicle on 5.9.2017
Palatine Jaycees	General Program Support	\$ 350.00	\$350.00	SLSF sent the application to request funds to be directed towards the NWSRA Horseback Riding Program on 4.10.2017
MB Financial	PURSUIT - iPads	\$ 2,000.00	\$2,000.00	SLSF submitted a grant for the purchase of 5 iPads, 5 Otterbox case and misc. Apps to be used at the PURSUIT Program

## Board Report - Grant Activity for 2017

The following is a list of 2017 grant activity on behalf of SLSF/NWSRA

Schneider Electric	PURSUIT	\$ 10,000.00	\$10,000.00	SLSF sent the letter to request funds to help with the PURSUIT Program on 5.18.2017
Wheaton Franciscan Sisters Ministry Fund	PURSUIT	multi year - see notes	\$221,000.00	SLSF submitted a multi-year grant for PURSUIT Adult Day Program Expansion as well as funding for resource rooms for PURSUIT 1 & 2. <b>Year 1 Funding</b> \$286,000 with \$75,000 matching <b>Year 2 Funding</b> \$240,000 with \$45,000 matching <b>9.13.2017 SLSF received notification that they will be awarded \$221,000 for PURSUIT 3 in FY2017. SLSF is invited to to apply in FY2018 for remainder of funding that may be needed to complete project.</b>
Chicago Bulls Charities	General Program Support	\$ 10,000.00	\$5,000.00	SLSF was invited to apply for a grant for general program support due to their relationship with the Windy City Bulls on 7.18.2017. SLSF received approval on 10.30.2017. Amount and letter will be delivered within the next few weeks.
<b>Total Proposed Amount from Private Grant Money</b>		<b>\$ 83,695.09</b>		
<b>Total Approved Grant Money in 2017</b>		<b>\$278,555.00</b>		
<b>Total Private Grant Money Received in 2017</b>		<b>\$ 271,195.16</b>		<i>*\$3,473.53 grant money from the 2016 EGT grant. Money is awarded from April 2016 - March 2017</i>
<b>Budgeted Amount</b>		<b>\$ 75,500.00</b>		

To: Tracey M. Crawford, President

From: Nanette Sowa, Superintendent of Development

Date: January 4, 2018

Re: Sponsor Report for 2017

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Event Sponsorships received in 2017

1 Opportunity Partner -NCH (\$5000 Gold sponsor for GMFS and CA Gala)	\$10,000.00
Event Sponsors Unrestricted	\$58,801.50
Event Sponsor Restricted	\$13,925.00
<b>Total</b>	<b>\$82,726.50</b>
<i>QB report will be different as it shows 2018 donations sent in 2017</i>	

Sponsor Program

Note: Table sponsors are coded as registrations and will not be included in the sponsorship reports in 2017

Sponsorships secured:

- Northwest Community Healthcare - \$10,000 Opportunity Partner – sponsor benefits for Gold Medal Fashion Show- \$5,000, Celebrate Ability Gala -\$5,000
- **GMFS:** \$2,250 in total sponsorship (not including NCH)
- **Hole Sponsor Deal:** \$5,600 in total sponsorship
- **Buffalo Grove Golf Outing:** \$13,725 in total sponsorship
- **Palatine Hills Golf Outing:** \$5,275 in total sponsorship
- **Moretti's/NWSRA Golf Outing-** \$8,650 in total sponsorship
- **Women's Golf Outing:** \$3,550 in total sponsorship
- **Arlington Classic Golf Outing:** \$9,750 in total sponsorship
- **Terrazzo & Marble Golf Outing:** \$14,100 in total sponsorship
- **Celebrate Ability:** \$3,000 in total sponsorship (Not including NCH)
- **Camp Connections Family Day:** Mitsubishi Electric Automation gave a \$2500 donation and the Mitsubishi Foundation matched it with a \$2500 donation, Scheck and Siress gave a \$250 donation. These gifts are recognized as sponsors of those events, but the monies are classified as miscellaneous donations so are not included in the sponsorship budget.
- **NWSRA Tee Shirts:** The Schaumburg Professional Firefighters gave \$1,076.50
- **NWSRA Halloween Party:** The Rotary Club of Schaumburg/Hoffman Estates gave \$500

In-kind:

- **GMFS:** Formally Modern Tuxedos, JC Penney's -Woodfield, Dress Barn-Schaumburg, Dick Wilson and Forbici Salon are in-kind sponsors of the Gold Medal Fashion Show.
- **ALL GOLF OUTINGS:** Miller/Coors donated all beer for outings will be distributed via Kloss Distributors at Lake County events and Town and Country Distributors at Cook County events.
- **ALSO ALL GOLF OUTINGS:** Kolbi Pipe Marker is donating all signage
- **BGGO:** Sunset Foods donated bottled water, Lexus of Arlington- Hole in One Car, Buffalo Grove Fire Department- Truck for Ball Drop
- **PHGO:** No additional in-kind donations
- **M/NWSRA:** Napleton Automotive Group-Hole in One Car, Pepsi Americas- sodas and water, Get Fresh Produce – produce, Dick Wilson- tee gifts
- **Women's:** No additional in-kind donations
- **AHGO:** Arlington Heights Park District-tee gifts
- **T&M:** None
- **Gala:** None

<b>Cornerstones</b> Three cornerstones recognized as essential to SLSF’s continued success reviewed during strategic planning years.	<b>Focus/Long-Term Goals</b> The area of focus under each corner stone. These are broad ideas that are developed every 3 – 5 yrs. during strategic planning.	<b>Short-Term Goals</b> What we need to do to address our long term goals, annually, under each focus/long term goal.	<b>Measurable Objective</b> The measurable actions that will tell us that we are succeeding.	<b>Status</b> The progress report for each objective.
<b>Fundraising</b>	<b>Fundraising</b>			
<p><b>Goals completed by:</b>                      Nanette                      Cathy                      Tracey                      Megan</p>	<p>Ensure maintenance of current fundraising levels through implementation of targeted, effective fundraising efforts</p>	<ul style="list-style-type: none"> <li>• Continue to provide a calendar of quality fundraising events</li> <li>• Seek out additional sponsors by attending networking events and area chamber of commerce events.</li> <li>• Identify new, smaller sponsorship opportunities for targeted NWSRA events</li> <li>• Research and contact companies within the 17 park district area that can be enlisted as SLSF partners</li> </ul>	<ul style="list-style-type: none"> <li>• Provide at least 8 fundraising events</li> <li>• Contact 5 new potential sponsors</li> <li>• Identify 3 new sponsorship opportunities for targeted NWSRA events</li> <li>• Research and contact 3 companies within the 17 park district area</li> </ul>	<ul style="list-style-type: none"> <li>• SLSF has confirmed 8 events for the 2017 year. They are listed on the calendar and each has a committee and venue in place.</li> <li>• The GMFS had three new sponsors</li> <li>• The Buffalo Grove Outing had a brand new presenting sponsor: CDE Collision Centers</li> <li>• SLSF met with the Arlington Heights Pipe and Cigar shop who will be new</li> </ul>

		<ul style="list-style-type: none"> <li>• Create and promote an individual giving opportunity that allows for small monthly gifts given automatically through an online processor.</li> </ul>	<ul style="list-style-type: none"> <li>• Create and promote one individual giving opportunity with monthly gift option</li> </ul>	<p>sponsors at the Arlington Classic and are interested in additional opportunities.</p> <ul style="list-style-type: none"> <li>• SLSF has hired an outside firm to create a development plan for the foundation.</li> <li>• The Sch/HE Rotary will sponsor the Northern and Southern Stars Halloween Dance and volunteer as well.</li> <li>• Nanette is asking board members to give a monthly gift using the online portal. They have agreed, but the portal is changing and the ability to make monthly</li> </ul>
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		<ul style="list-style-type: none"> <li>• Maintain current grant timeline.</li> <li>• Research and apply for new grants that support the goals of the foundation.</li> </ul>	<ul style="list-style-type: none"> <li>• Apply for at least 90% of previous year's grants</li> <li>• Research and apply for two new grants</li> </ul>	<p>pledges it currently in process.</p> <ul style="list-style-type: none"> <li>• SLSF is on target and has applied for 80% of 2016 grants.</li> <li>• SLSF applied for new grants from the Chicago Bulls, MB Financial, PayPal and The Wheaton Franciscan Sisters Ministry Fund.</li> <li>• The MB Financial grant was approved to purchase iPads.</li> <li>• The grant from the Wheaton Franciscan Sisters was approved for</li> </ul>
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		<ul style="list-style-type: none"> <li>SLSF will seek donors/grants/sponsors to fund the creation of an updated sensory room at the HPPD program space.</li> </ul>	<ul style="list-style-type: none"> <li>Find 2 potential donors/grants/sponsors for PURSUIT 2</li> </ul>	<p>\$221,000 to help with the creation of PURSUIT 3. SLSF will be able to apply in 2018 for additional monies needed to complete project.</p> <ul style="list-style-type: none"> <li>The Chicago Bulls Charities grant was approved for \$5,000.</li> <li>SLSF submitted a grant to Frontier Days from Arlington Heights to help with the purchase of items for the Sensory Room at HP. The grant wasn't approved</li> <li>SLSF will begin researching grants for 2018 for the Sensory Room at HP.</li> </ul>
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SLSF 2017 Foundation Goals

		<ul style="list-style-type: none"> <li>If adequate funds are not received by June, the Sensory Room will be the focus of the Gala's Impact Auction.</li> </ul>		<ul style="list-style-type: none"> <li>Celebrate Ability's Impact Auction will be the HP Sensory Room.</li> <li>SLSF's Holiday Annual Appeal will be restricted to purchase items for the HP Sensory Room.</li> </ul>
<b>Marketing and Technology</b>				
<p><b>Goals Completed by:</b>            Brian            Production Coordinator            Tracey            Nanette            Cathy            Megan</p>	<p><b>Marketing &amp; Technology</b>            Build brand awareness in the community and with potential partners</p>	<ul style="list-style-type: none"> <li>Use the SLSF name/logo on all communications</li> <li>Send the SLSF Impact in an electronic format sent semi-monthly to all SLSF donors and all NWSRA participants for whom we have email addresses.</li> <li>Publicize and maintain the new SLSF website</li> </ul>	<ul style="list-style-type: none"> <li>Publish the SLSF name/logo in at least 5 print communications and 5 online outlets</li> <li>Send the SLSF Impact bi-monthly</li> </ul>	<ul style="list-style-type: none"> <li>Goal achieved. SLSF events posted in over 20 online calendars, multiple social media sites, e-mail campaigns, newspapers, videos, posters, invitations, flyers, rack cards, annual report, donation cards, website, etc.</li> </ul>

SLSF 2017 Foundation Goals

	<p>Ensure functionality and enhance efficiency of SLSF donations and event registration systems through effective IT solutions.</p>	<p>accessible from the NWSRA website</p>	<ul style="list-style-type: none"> <li>SLSF will distribute tee shirts with the SLSF logo that will be given to volunteers at events.</li> </ul>	<ul style="list-style-type: none"> <li>Goal achieved. SLSF Impact is sent bi-monthly</li> <li>SLSF has ordered new volunteer tee shirts</li> <li>SLSF has hired Gesture, Inc. to run the online bidding and registration process for the Gala.</li> </ul>
<p><b>Community Relations</b></p>				
<p>Goals Completed by: Nanette Cathy Tracey Megan</p>	<p><b>Community Relations</b></p> <ul style="list-style-type: none"> <li>Increase the SLSF identity in the communities served by NWSRA</li> </ul>	<ul style="list-style-type: none"> <li>The SLSF staff and board will work together to identify young professionals and community members that may be interested in serving on an event committee.</li> <li>Partner with an outside firm to promote SLSF as a targeted charity beneficiary.</li> </ul>	<ul style="list-style-type: none"> <li>Identify 3 young professionals and community members</li> <li>Partner with 1 outside firm to promote SLSF as a targeted charity beneficiary.</li> <li>Nominate at least 2 volunteers for service awards</li> </ul>	<ul style="list-style-type: none"> <li>A young NWSRA part-time staff member has joined the Fashion Show committee</li> <li>Dakota K once again highlighted SLSF in their Feb/March promotion</li> </ul>

		<ul style="list-style-type: none"> <li>Nominate volunteers for service awards (IPRA, Kevin T. Kendrigan Spirit Award and other community awards).</li> <li>SLSF staff members will join or maintain memberships in local service clubs and chambers of commerce</li> </ul>	<ul style="list-style-type: none"> <li>Join or maintain memberships in at least 2 local service clubs or chamber of commerce</li> </ul>	<ul style="list-style-type: none"> <li>Tracey, Nanette and now Cathy are all Rotarians.</li> <li>Megan became a member of the Palatine Jaycees.</li> <li>Continued membership in the Arlington Heights and the Rolling Meadows Chambers of Commerce.</li> </ul>
Goals Completed by: Nanette Cathy Tracey	<b>Community Relations</b>  Strengthen SLSF Board Member commitment	<ul style="list-style-type: none"> <li>Discern reasons for Board Members sitting on the board, their individual skills and how to make those skills work on the board.</li> </ul>	<ul style="list-style-type: none"> <li>Meet with each non park district director board member at least once during 2016</li> </ul>	<ul style="list-style-type: none"> <li>In 2017 NS will meet with all board members.</li> <li>A spreadsheet is filled in after each</li> </ul>

		<ul style="list-style-type: none"> <li>• Enable the SLSF staff to respond to the requests made by board members</li> <li>• Identify current Board Member levels of commitment and promote further opportunities</li> <li>• Encourage SLSF Board Members to maintain or increase their personal commitment to the viability of SLSF.</li> </ul>	<ul style="list-style-type: none"> <li>• Maintain a spreadsheet of the board member responses from the individual meetings</li> <li>• Create an individualized Board Member giving analysis to create an annual commitment plan</li> <li>• Host discussions with Board Members on maintaining or increasing their personal commitment at individual Board Member meetings.</li> </ul>	<p>board member meeting.</p> <ul style="list-style-type: none"> <li>• Each board member has a profile sheet that is updated annually. Nanette will discuss this sheet at each board member meeting.</li> <li>• SLSF will continue to include information about fundraising best practices at board meetings and in the monthly SLSF Board member updates.</li> </ul>
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# MEMO

To: Tracey Crawford, SLSF President  
From: Nanette Sowa, Superintendent of Development  
Date: 1/4/2018  
RE: 2017 Annual Appeal Fund

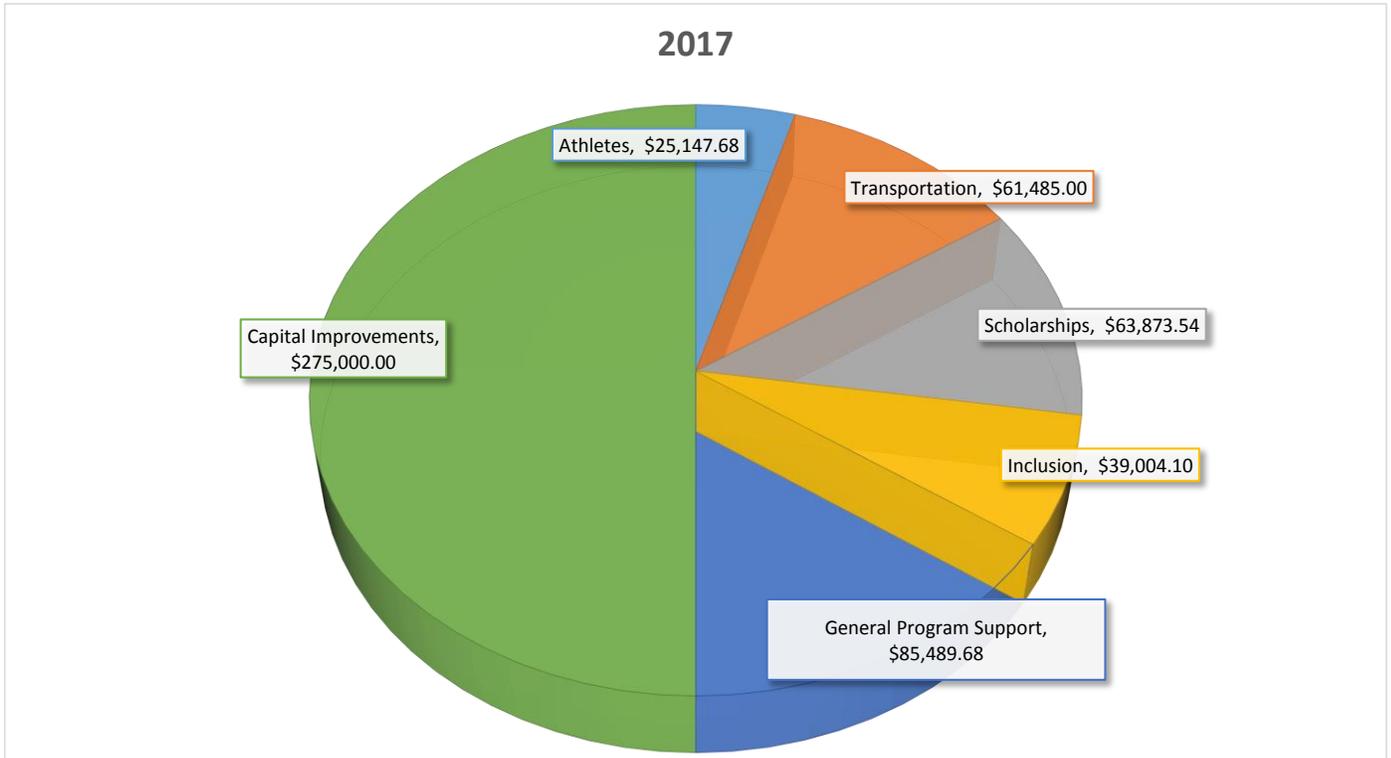
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The 2017 goal for the Annual Appeal Fund was to acquire new donors while retaining current donors which would result in a net increase of revenue. Below is a chart which compares the 2016 and 2017 Annual Appeals.

Description	2016	2017	Change from 2016 - 2017
<b>Amount Received</b>	<b>\$ 25,620.75</b>	<b>\$ 18,200.75</b>	<b>\$ (7420)</b>
<b>Number of Responses</b>	<b>106</b>	<b>102</b>	<b>(4)</b>
<b>Response Rate</b>			
Total Number Mailed	<b>3,525</b>	<b>3,820</b>	295
% Response	<b>3.0%</b>	<b>2.67%</b>	<b>(.3%)</b>
<b>Average Gift</b>	<b>\$ 241.71</b>	<b>\$ 178.44</b>	<b>\$ (63.27)</b>
<b>Costs</b>			
Total Actual Expenses	<b>\$ 2,133.00</b>	<b>\$ 2743.94</b>	\$ 610.94
Cost per donor	<b>\$ 20.12</b>	<b>\$ 26.90</b>	\$ 6.78
Cost per dollar raised	<b>\$ 0.09</b>	<b>\$ 0.15</b>	\$ .06
<b>Net Amount Raised</b>	<b>\$ 23,487.75</b>	<b>\$ 15,456.81</b>	<b>\$ (8030.94)</b>

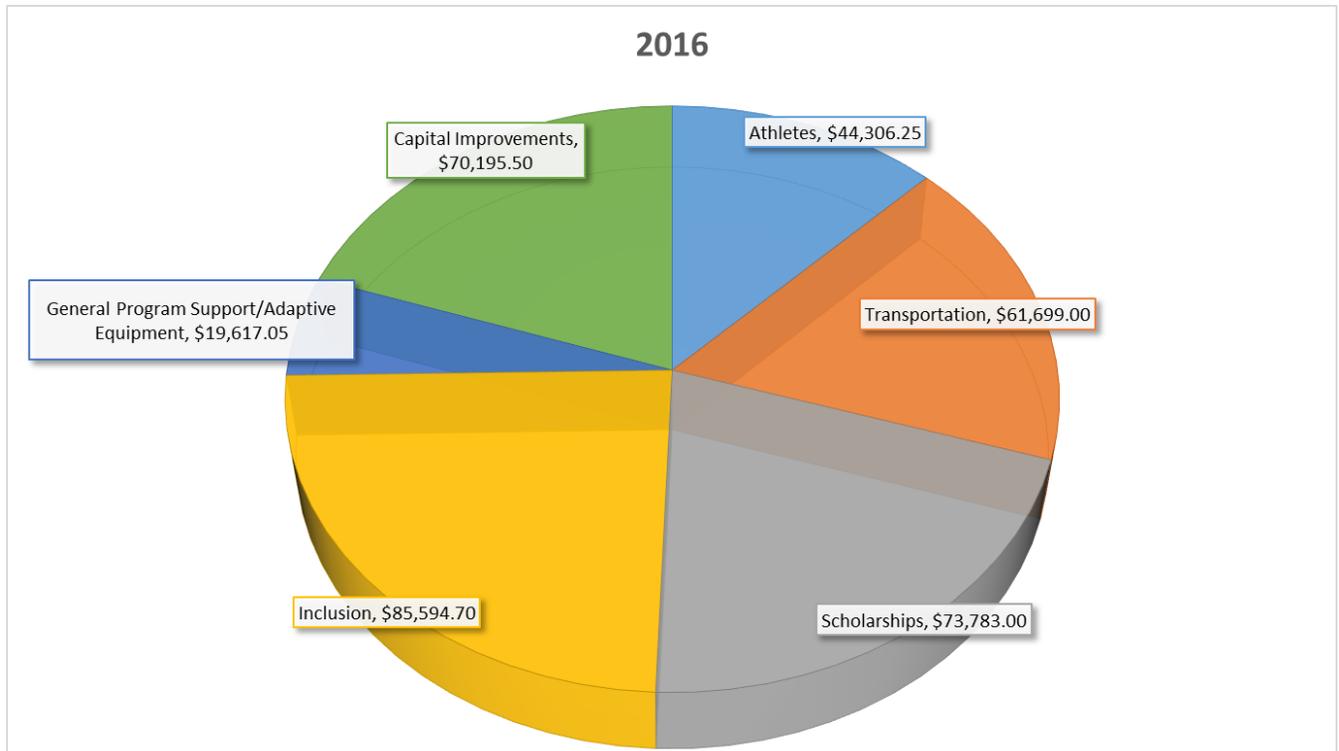
*Numbers as of 1/4/2018*

# 2016 & 2017 SLSF GIVING COMPARISON



**2017 SLSF Total Amount = \$550,000**

*\*2017 Capital Improvement – Hanover Park Park District Ramp*



**2016 SLSF Total Amount = \$355,195.50**

*\*2016 Capital Improvement – Sensory Room at Rolling Meadows Location*

To: Tracey Crawford, Executive Director  
SLSF Board Meeting  
From: Jayne Finger, Superintendent  
Date: January 10, 2018  
Re: 2017 Scholarship Report

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A total amount of \$63,725.12 was awarded in scholarships in 2017. A breakdown of the number of scholarships awarded and the number of individuals that received scholarships will be included in the oral report to be given at the SLSF Board Meeting on Tuesday, January 17<sup>th</sup>.

Below are the amounts awarded by program category and season:  
Winter/Spring Weekly Programs = \$6,162.25  
Day Camp = \$37,252.19  
Summer Weekly Programs = \$4,847.50  
Fall Weekly Programs = \$8,813.25  
Leisure Education = \$3,421.00  
STAR Academy = \$3,228.87

Scholarship 4 year Report

**Total Amounts Given by Program/Season for Scholarships over the last four years**

<b>Programs</b>	<b>Amount 2014</b>	<b>Amount 2015</b>	<b>Amount 2016</b>	<b>Amount 2017</b>	<b>Total</b>
Winter/Spring Weekly	\$ 3,691.85	\$ 3,461.25	\$ 7,831.50	\$ 6,162.25	<b>\$21,146.85</b>
Day Camp (total)	\$ 51,899.75	\$ 49,161.12	\$ 46,420.00	\$ 37,252.19	<b>\$184,733.06</b>
Summer Weekly	\$ 2,464.25	\$ 2,053.50	\$ 3,435.75	\$ 4,847.50	<b>\$12,801.00</b>
Fall Weekly	\$ 5,484.00	\$ 10,429.00	\$ 8,305.75	\$ 8,813.25	<b>\$33,032.00</b>
Leisure Education	\$ 2,822.03	\$ 2,481.00	\$ 4,002.00	\$ 3,421.00	<b>\$12,726.03</b>
STAR Academy				\$ 3,228.93	<b>\$3,228.93</b>
<b>Total</b>	<b>\$ 66,361.88</b>	<b>\$ 67,585.87</b>	<b>\$ 69,995.00</b>	<b>\$ 63,725.12</b>	<b>\$267,667.87</b>

**Number of individuals receiving scholarships**

**\*If one person receives three scholarships, it is counted as one person below**

<b>Programs</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>Total</b>
Winter/Spring Weekly	27	28	50	41	<b>146</b>
Day Camp (total)	75	82	74	71	<b>302</b>
Summer Weekly	23	18	34	38	<b>113</b>
Fall Weekly	32	56	55	52	<b>195</b>
Leisure Education	254	339	316	286	<b>1195</b>
STAR Academy				4	<b>4</b>
<b>Total</b>	<b>411</b>	<b>523</b>	<b>529</b>	<b>492</b>	<b>1955</b>

**Number of scholarships given to individuals**

**\*If one person receives three scholarships, it is counted as three scholarships below**

<b>Programs</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>Total</b>
Winter/Spring Weekly	90	32	86	79	<b>287</b>
Day Camp (total)	80	95	77	75	<b>327</b>
Summer Weekly	30	28	48	73	<b>179</b>
Fall Weekly	54	85	76	81	<b>296</b>
Leisure Education	309	403	365	309	<b>1386</b>
STAR Academy				4	<b>4</b>
<b>Total</b>	<b>563</b>	<b>643</b>	<b>652</b>	<b>621</b>	<b>2479</b>

To: Tracey Crawford, SLSF President  
 From: Nanette Sowa, Superintendent of Development  
 Cathy Splett, Foundation Coordinator  
 Re: SLSF Budget Worksheet and SLSF Village Bank and Trust Account Balance  
 Date: January 9, 2018

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**2018 Start of Year Balance**

- The SLSF team has finalized the FY 2018 budget. As a reminder this is a budget worksheet for the annual operating budget. This worksheet is used to manage the daily operations of the foundation throughout the year. The worksheet does not reflect actual cash in the bank.
- The PYE 2017 fourth quarter report reflects a loss of \$(7,579.31). Foundations aren't "profit-centered"; the Foundation's purpose must be "public or charitable" for the benefit of those served. SLSF has raised funds in 2017 that will be used for 2018 projects and programs that are needed by those served.
- SLSF will be following the Development Plan created in 2017 with the assistance of American Philanthropic to raise additional funds.

As of December 29, 2017 the SLSF Village Bank and Trust account had a balance of \$300,705.22. The following chart explains the dollars in the account:

<b>SLSF Village Bank and Trust Account Balance as of 12/29/2017</b>	<b>\$300,705.22</b>
Booster Club fund carry over	<b>\$1,500.00</b>
2017 Revenue Deferred to 2018	<b>\$14,140.00</b>
Grant dollars allocated for PURSUIT 3 in 2018	<b>\$221,000.00</b>
<b>Subtotal 2018 dollars in reserve</b>	<b>\$236,640.00</b>
<b>Total Village Bank &amp; Trust Account</b>	<b>\$64,065.22</b>

*Unaudited numbers*

- It has been recommended that SLSF start each year with no more than \$90,000 in the Village Bank & Trust account. As the above chart show, SLSF has over \$300,000 in the account, however, \$236,640 of those dollars are already earmarked for 2018 projects. SLSF will be starting FY2018 with \$64,065.
- Reviewing the FY 2015-2017 1<sup>st</sup> Quarter reports, SLSF's average income was \$113,802 and expenditures were \$27,296. Because the 1<sup>st</sup> Quarter is usually more than self-sustaining, SLSF is comfortable recommending to start FY 2018 with just over \$64,000.

**2018 Capital Expense Projects**

- Mount Prospect Park District Community Center will be the location for the new NWSRA programming space which will house PURSUIT 3 as well as other programming.
- The 2018 SLSF budget requests the board approve a transfer from the BF Edwards investment account not to exceed \$100,000 to pay for expenses incurred by the creation of the programming site that are not covered by grants or donations: Under the 2018 proposed budget this line item is 33700 Investment Transfer.

**To: Tracey Crawford, Executive Director**  
**From: Brian Selders, Superintendent of Communications & IT**  
**Re: NWSRA/SLSF Marketing and Public Relations Report**  
**Date: January 5, 2018**

Following is a synopsis of marketing activities that have taken place in 2017:

<b>MEDIA</b>	
<b>Daily Herald</b>	<ul style="list-style-type: none"> <li>• Article on Sensory Friendly Holiday Concert</li> <li>• Celebrate Ability Gala on upcoming events</li> <li>• Article on Moretti's/NWSRA Golf Classic</li> <li>• Article on Women's Golf Outing</li> <li>• Article on STAR Academy</li> <li>• Article on Broadway Buddies' Grease production</li> <li>• Article on NWSRA Distinguished Accreditation</li> <li>• Article on PURSUIT 2</li> <li>• Article on Snoezelen Room</li> <li>• Article on Steve McVoy- World Games</li> <li>• Articles on Gold Medal Fashion Show</li> <li>• App Ad created for: Gold Medal Fashion Show</li> </ul>
<b>Chicago Tribune</b>	<ul style="list-style-type: none"> <li>• Article on Sensory Friendly Holiday Concert</li> <li>• Article on Moretti's/NWSRA Golf Classic</li> <li>• Article on Women's Golf Outing</li> <li>• Articles on STAR Academy, Parent Info Nights, Scholarships</li> <li>• Article on UPS Grant</li> <li>• Article on NWSRA Distinguished Accreditation</li> <li>• Article on PURSUIT 2</li> <li>• Article on Snoezelen Room</li> <li>• Article on Steve McVoy- World Games</li> <li>• Articles on Gold Medal Fashion Show</li> </ul>
<b>TribLocal/ Metromix</b>	<ul style="list-style-type: none"> <li>• Added SLSF events to online calendar of events</li> </ul>
<b>Daily Herald Business Ledger</b>	<ul style="list-style-type: none"> <li>• Submitted SLSF information for the Business Ledger Philanthropy Guide</li> </ul>
<b>Patch</b>	<ul style="list-style-type: none"> <li>• Article on Gold Medal Fashion Show posted</li> </ul>
<b>Miscellaneous</b>	<ul style="list-style-type: none"> <li>• Article on NWSRA in Voyage Chicago magazine</li> <li>• SLSF events posted online to the following sites: ABC Chicago, CBS Chicago, Daily Herald, WGN TV, Chicago Mama, Chicago Music Guide, North Shore Breaking News, B96, and more</li> </ul>

<b>ONLINE</b>	
<b>NWSRA/SLSF Online</b>	<ul style="list-style-type: none"> <li>• SLSF Gold Medal Fashion Show online registration pages and social media page</li> <li>• Created Heart of the Community web page</li> <li>• Updated ADA website</li> <li>• New web pages created for STAR Academy, Advocacy, NWSRA Village, Behavior Intervention Team, Fair Play at NWSRA</li> <li>• Implemented Part Time staff application system with online platform to RSVP for interview nights, auto-reply e-mails, exportable reports, social sharing and more.</li> <li>• Online system for receiving participant story information from staff implemented</li> <li>• Updated PURSUIT web page with online article and new format</li> <li>• Updated Snoezelen web page and links</li> <li>• Updated SLSF Facebook event pages</li> <li>• Day Camp flyer posted on School District virtual backpacks throughout NWSRA service area</li> <li>• Updated 2017 information across main site pages</li> <li>• Updated links throughout Directors sites, main site, ADA site and PDMarketing site</li> <li>• Bi-monthly NWSRA Now and SLSF Impact e-newsletters sent</li> <li>• Monthly NWSRA and SLSF Board Update e-newsletters sent</li> </ul>
<b>Social Media</b>	<ul style="list-style-type: none"> <li>• Recruitment video posted through Facebook ads</li> <li>• Created social media review with engagement statistics</li> <li>• Announced and opened NWSRA Village</li> <li>• Instagram page created</li> <li>• Invitations for STAR Academy Parent Info Nights sent</li> <li>• Invitations for NWSRA Open House- Hanover Park sent</li> <li>• Invitations for DHS Director Greg Fenton event sent</li> <li>• Invitations for PURSUIT 2 Open House sent</li> <li>• Invitation for SLSF Development Plan Focus Groups created and sent</li> <li>• New Youtube videos posted</li> <li>• New videos created for SLSF events</li> <li>• NWSRA now has over 5,000 Facebook followers</li> </ul>
<b>PUBLICATIONS and FLYERS</b>	
<b>NWSRA/ SLSF</b>	<ul style="list-style-type: none"> <li>• Skating Championships Invitational materials created</li> <li>• Lightning All Star Game materials created</li> </ul>

	<ul style="list-style-type: none"> <li>• Heart of the Community logo created</li> <li>• New Gold Medal Fashion Show logo created</li> <li>• Inclusion brochure redesigned</li> <li>• New PT recruitment flyer created</li> <li>• SLSF Fall Annual Appeal sent</li> <li>• 2018 Brochure redesign complete</li> <li>• NWSRA All Star Basketball, Sensory Holiday and other event flyers created</li> <li>• Updated NWSRA fact sheet and inclusion flyer</li> <li>• SLSF Holiday Luncheon invitation sent</li> <li>• SLSF Golf Outing and Celebrate Ability Gala materials created and sent</li> <li>• STAR Academy materials created and sent</li> <li>• 3 year printing materials bid completed</li> <li>• SLSF Spring Appeal created and sent</li> <li>• NWSRA Winter/Spring, Summer 2017 and Fall 2017 brochures created and sent</li> <li>• NWSRA/SLSF 2017 Annual Report created and sent</li> <li>• Day Camp brochures created and sent</li> <li>• Co-op SRANI Ad placed in Chicago Special Parent magazine</li> <li>• 2016 SLSF Board Member review created</li> <li>• 2017 SLSF Event materials updated</li> <li>• Gold Medal Fashion Show invitations and program books created and sent</li> <li>• Created 2017 calendar of events</li> </ul>
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**Television, Video and Radio**

<p><b>NWSRA/SLSF</b></p>	<ul style="list-style-type: none"> <li>• Virtual Snoezelen Room Hanover Park video created</li> <li>• Promotional video created for Snoezelen Room- client story</li> <li>• Virtual facility tour of Hanover Park programming space created</li> <li>• Video created for NWSRA recruitment</li> <li>• Video created for STAR Academy- introduction to program</li> <li>• Video created for Snoezelen Room- highlighting pieces within room</li> <li>• Video created for SLSF Gold Medal Fashion Show</li> <li>• SLSF event slides played on Village of Palatine Channel 6 message board</li> <li>• A series of 30 second commercials about NWSRA is being played on the Village of Hoffman Estates, Village</li> </ul>
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	of Mount Prospect and Schaumburg Park District local television stations.
<b>ADDITIONAL MARKETING</b>	
<b>NWSRA/SLSF</b>	<ul style="list-style-type: none"> <li>• IPRA Community Service Awards ordered</li> <li>• Submitted Snoezelen Sensory Therapy program for ITRS Outstanding Program Award</li> <li>• Virtual Reality app created for Snoezelen Room</li> <li>• Ala Carte Entertainment to receive Best Friend of Illinois Parks Award at IAPD Best of the Best Awards Gala</li> <li>• Hosted partner event with Connect to Community- Director of Developmental Disabilities Division as guest speaker</li> <li>• Vehicle signage created for Moretti's/NWSRA Golf Classic</li> <li>• Hanover park space IT implementation complete</li> <li>• Signage installed at Hanover Park space</li> <li>• Auto payment/Flex Spending procedures created for STAR Academy</li> <li>• Partnered with John Hersey High School through cross-promotion of Funner Olympics- received logo on banner, 550 t-shirts and flyers</li> <li>• Partnered with Northwestern University through cross-promotion of Make-a-thon and NWSRA</li> <li>• Submitted Agency Showcase nominations to IPRA</li> <li>• Presented IAPD/IPRA Community Service Awards to supporters</li> <li>• Article featured NWSRA in PDRMA safety newsletter</li> <li>• Snoezelen remote access/video project complete</li> </ul>
<b>Expos/Networking Events Attended</b>	
<b>NWSRA/SLSF</b>	<ul style="list-style-type: none"> <li>• Calendar of expos/networking events attended created by Outreach Committee. Attended 33 events in 2017 and formed several new collaborative partnerships</li> </ul>
<b>IN PROGRESS</b>	
<b>NWSRA/SLSF</b>	<ul style="list-style-type: none"> <li>• Database/website build project</li> <li>• Various publications and online media</li> <li>• 2018 SLSF materials</li> <li>• Quickbooks transition</li> <li>• Annual Report and 2018 materials</li> </ul>

To: Tracey Crawford, Executive Director  
From: Rachel Hubsch and Andrea Griffin, Superintendents of Recreation  
Re: Program Report, November 10, 2017– January 9, 2018

## **Program Highlights**

### Weekly Programs

Strength and Conditioning, a Health and Wellness program held at the Schaumburg Community Recreation Center, saw great success during the fall program season. Chris S. a participant with cerebral palsy, resident of Wheeling was able to access two new lower body fitness machines independently by utilizing adaptive equipment. The instructor is able to set Chris up on the machine and allow him to confidently complete his workout while she assists other participants within the program.

### Clubs

Fifteen Friday night club events have run since November including the iconic Snowflake Ball, which brought in over 150 registrations. This event encompasses five different social clubs and had numerous individual volunteers and members of the Buffalo Grove Interact Club to help decorate and dance in the holiday season with everyone.

### Healthy Minds/Healthy Bodies (HMHB)

In November, Streamwood Park District joined the HMHB program in order to service the injured veterans within the community. Collectively, Bartlett, Buffalo Grove, Palatine, and Streamwood Park Districts provided 74 free one year memberships and 555 personal training sessions for 37 injured veterans within the community. NWSRA continues to provide monthly networking events to emphasize the healthy mind.

### Special Events

NWSRA ran six events to finish out the year. Including a holiday lights show at the Mortem Arboretum, creating gift jars, and two parent night outs. One new Special Event is geared toward community integration with teens, the Teen Night Out crew enjoyed a “mock” movie theater experience at the Rolling Meadows Community Center. Each participant learned money management, socialization skills, and enjoyed purchasing snacks from the concession stand. The teens will be able to put the skills they learned into action at a local movie theater this spring.

### Leisure Education

Central Community Center in Mount Prospect is now the new location for the roller skating program, which was previously held at a commercial facility. Due to the change in venue, the cost to run the program decreases. Resulting in an increase in registrations of students choosing roller skating. The classrooms enjoy the ability to choose the music and have private skate time with their peers.

### Camp

Eight winter break camps hosted close to 70 participants and were housed in the Wheeling, Mount Prospect, Bartlett, and Rolling Meadows Park District communities. Program Specialists created unique sensory activities including “hot chocolate goop” and “winter in bag.” Frosty Kids Camp, who serves early childhood participants, enjoyed a field trip to Wonderworks, a museum that provides a hands-on environment intended to strengthen the social, emotional and intellectual development of children.

### Inclusion

In 2017, there was a nine percent increase in overall registrations with inclusion support. It is noteworthy that this increase in registration was made with a smaller number of unique individuals, indicating supported participants are registering for more programs within member districts. With the increase in registrations but the decrease in part-time staff, the inclusion team worked relentlessly with park district program coordinators to provide inclusion training and on-site observations to ensure needs were being met.

	<b>2016</b>	<b>2017</b>
<b>Year End Registrations</b>	2108	2298
<b>Individual Participants (year)</b>	440	413
<b>Individual Staff (year)</b>	322	280
<b>New Participants</b>	124	126

### NWSRA Lightning Sports Teams

Basketball season is underway with seven teams and over 70 athletes. Snowshoeing and Alpine Ski have started training for state games in early February. The Lightning Swim Team participated in two swim meets this fall, bringing home numerous gold, silver and bronze medals. NWSRA Lightning cheerleaders took to the stage at the Xtreme Spirit Cheer Competition and took home first place. Eleven NWSRA figure skaters competed at the Franklin Park ice skating competition on January 6. The skaters came home with nine 1st place, eight 2nd, two 3<sup>rd</sup>, and two 4th place finishes.

### The PURSUIT Adult Day Program

107 individuals on the interest list are ready to be served for 2018 and nearly 100 community members were given tours between PURSUIT HP and PURSUIT RM. In 2017, clients at both sites in Rolling Meadows and Hanover Park, completed a total of 1,653 volunteer hours. PURSUIT HP Coordinator, Trisha Palmieri, met with the Habitat for Humanity ReStore Director. The program will start volunteering at the new site in January.

PURSUIT RM and PURSUIT HP coordinators have been trained and will now be offering Next Chapter Book Club (NCBC) at the program. Ups for Downs has partnered with Ohio State University Nisonger Center to bring the NCBC to the Chicago area. Next Chapter Book Clubs bring together adults with disabilities in community venues to read and discuss any type of written material. This allows for socialization and continuous learning in the community for individuals who have aged-out of the public education system and programs. NCBC members do not have to read at any certain level, hence all are welcome, including nonreaders. NCBC's are groups of 6 – 8 members and two facilitators that meet 2 - 4 times per month at community hangout as Starbucks, Barnes & Noble, or Panera. The reading material is selected by group members and the facilitators provide reading assistance and dialogue initiation.

### STAR Academy

The after school program started incorporating visiting the local Jewel to help with increase in community integration. Clients were given tasks to find certain foods and how much they cost. Starting January 8, three new clients registered for the STAR program, two of these clients are new to participating in NWSRA programs. The total number of clients has increased to 40 since this new collaborative program started at the beginning of the school year.

## **Staff Update**

### Part-Time Staff & Volunteers

The Support Services Department highlighted Bill Kahles for the month of January. Bill who resides in Wheeling, has been a valued program assistant and driver in both the PURSUIT and Weekly programs. Multiple full and part time staff have expressed gratitude for having him in their programs, saying Bill is the perfect example of the ideal staff. Bill always steps up and is willing to help in any way he can, even subbing to drive door to door routes on Friday evenings. NWSRA applauds Bill as he continues to build wonderful relationships with his co-workers, families, and participants in the community. In the fall season, 58 individual volunteers assisted in providing the close ratio needed to serve participants in over 50 NWSRA programs

### Recruitment & Outreach

Twelve new part time employees have been hired and trained since November. The Recruitment Team has sent informational flyers to five new Therapeutic Recreation Professors at universities that current NWSRA Program Specialists graduated from, as well as two new contacts at area churches. Over 50 recruitment flyers have been posted at local community establishments such as schools, townships, libraries, and grocery stores.

### Staff Development and Training

Program staff attended an 1.5 hour training by JoAnn Snyder, Manager, on methods to incorporate music into programming. Staff learned how the implementation of music can develop language and social skills as well as using it as a sensory tool. The Future of Programming was presented by superintendents and managers, and included a discussion about the breakdown of program types, and current program planning. The Support Services Department provided a training to utilize part time staff and volunteers to their fullest potential. The annual review of patron transfers and safe lifting was led by the NWSRA Safety Committee. Jayne Finger, Superintendent, participated in the webinar offered by IAPD on December 6th about The New Illinois Sexual Harassment Law: What You Need to Know and What Your District Needs to Do. NWSRA is in the process to determine that the agency is currently meeting all of the requirements. The new law and the agency policy will be reviewed with staff at the February All Staff meeting.

### Behavior Team

Liz Thomas, Manager of Special Recreation (Collaboratives), joined the Behavior Team bringing a wealth of diverse experience to the group. The team focused on creating proactive plans for winter break camps, and provided a direct presence at each site. As a result, behavioral incidents at winter break camps were at an all-time low. The Behavior Team received three formal requests for support with specific participants during the fall program season resulting in eight on-site observations, trainings, and meetings were conducted. Ted Adatto, Manager of Inclusion Services and Nicole Estrada, Support Services Coordinator provided a behavior management training for STAR Academy staff which was focused on targeting the current behaviors of the participants in the program.

# **VII. Financial/ Investment Statements**

[Back to Home](#)



# BENJAMIN F. EDWARDS & CO.

INVESTMENTS for GENERATIONS

One North Brentwood Blvd., Suite 850  
Saint Louis, MO 63105 314-726-1600

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SPECIAL LEISURE SERVICES  
FOUNDATION  
ATTN TRACEY CRAWFORD  
3000 CENTRAL RD STE 205  
ROLLING MDWS IL 60008-2551



October 1, 2017 - October 31, 2017

Account Number: ~~XXXXXXXX~~

### Your Financial Advisor Is:

HANSON / FISHER / VANDERLUGT  
(630) 871-2673

### Portfolio at a Glance

	This Period	Year-to-Date
<b>BEGINNING ACCOUNT VALUE</b>	<b>\$1,182,287.57</b>	<b>\$1,197,097.58</b>
Withdrawals (Cash & Securities)	0.00	-125,000.00
Dividends, Interest and Other Income	366.37	16,305.35
<b>Net Change in Portfolio<sup>1</sup></b>	<b>14,978.54</b>	<b>109,229.55</b>
<b>ENDING ACCOUNT VALUE</b>	<b>\$1,197,632.48</b>	<b>\$1,197,632.48</b>

Estimated Annual Income \$16,800.67

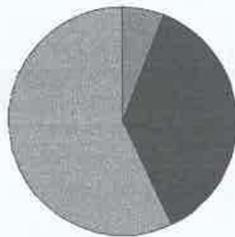
<sup>1</sup> Net Change in Portfolio is the difference between the ending account value and beginning account value after activity.

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### The Bank Deposits in your account are FDIC insured bank deposits.

FDIC insured bank deposits are not securities and are not covered by the Securities Investor Protection Corporation (SIPC). These bank deposits are covered by the Federal Deposit Insurance Corporation (FDIC), up to allowable limits.

### Asset Summary



Percent	Asset Type	Prior Year-End	Last Period	This Period
6%	Cash, Money Funds, and Bank Deposits	49,732.24	76,541.56	76,907.93
37%	Fixed Income	391,337.10	445,306.75	444,545.60
57%	Mutual Funds	756,028.24	660,439.26	676,178.95
<b>100%</b>	<b>Account Total (Pie Chart)</b>	<b>\$1,197,097.58</b>	<b>\$1,182,287.57</b>	<b>\$1,197,632.48</b>

Please review your allocation periodically with your Financial Advisor.





**BENJAMIN F. EDWARDS & CO.**  
 INVESTMENTS for GENERATIONS  
 One North Brentwood Blvd., Suite 850  
 Saint Louis, MO 63105 314-726-1600

SPECIAL LEISURE SERVICES  
 FOUNDATION  
 ATTN TRACEY CRAWFORD  
 3000 CENTRAL RD STE 205  
 ROLLING MDWS IL 60008-2551

November 1, 2017 - November 30, 2017  
 Account Number: ~~XXXXXXXX~~ ~~XXXXXXXX~~

**Your Financial Advisor Is:**  
 HANSON / FISHER / VANDERLUGT  
 (630) 871-2673

**Portfolio at a Glance**

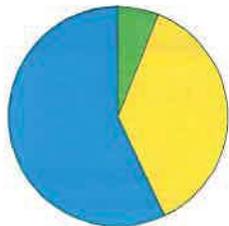
	This Period	Year-to-Date
<b>BEGINNING ACCOUNT VALUE</b>	<b>\$1,197,632.48</b>	<b>\$1,197,097.58</b>
Withdrawals (Cash & Securities)	0.00	-125,000.00
Dividends, Interest and Other Income	26.53	16,331.88
<b>Net Change in Portfolio<sup>1</sup></b>	<b>10,254.37</b>	<b>119,483.92</b>
<b>ENDING ACCOUNT VALUE</b>	<b>\$1,207,913.38</b>	<b>\$1,207,913.38</b>
Estimated Annual Income	\$16,827.20	

<sup>1</sup> Net Change in Portfolio is the difference between the ending account value and beginning account value after activity.

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**Asset Summary**



Percent	Asset Type	Prior Year-End	Last Period	This Period
6%	Cash, Money Funds, and Bank Deposits	49,732.24	76,907.93	76,934.46
37%	Fixed Income	391,337.10	444,545.60	443,689.00
57%	Mutual Funds	756,028.24	676,178.95	687,289.92
<b>100%</b>	<b>Account Total (Pie Chart)</b>	<b>\$1,197,097.58</b>	<b>\$1,197,632.48</b>	<b>\$1,207,913.38</b>

Please review your allocation periodically with your Financial Advisor.





**BENJAMIN F. EDWARDS & CO.**  
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 One North Brentwood Blvd., Suite 850  
 Saint Louis, MO 63105 314-726-1600

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SPECIAL LEISURE SERVICES  
 FOUNDATION  
 ATTN TRACEY CRAWFORD  
 3000 CENTRAL RD STE 205  
 ROLLING MDWS IL 60008-2551



**Your Financial Advisor Is:**  
 HANSON / FISHER / VANDERLUGT  
 (630) 871-2673

December 1, 2017 - December 31, 2017  
 Account Number:

**Portfolio at a Glance**

	This Period	Year-to-Date
<b>BEGINNING ACCOUNT VALUE</b>	<b>\$1,207,913.38</b>	<b>\$1,197,097.58</b>
Withdrawals (Cash & Securities)	0.00	-125,000.00
Dividends, Interest and Other Income	34,963.53	51,295.41
<b>Net Change in Portfolio<sup>1</sup></b>	<b>-26,185.08</b>	<b>93,298.84</b>
<b>ENDING ACCOUNT VALUE</b>	<b>\$1,216,691.83</b>	<b>\$1,216,691.83</b>
Estimated Annual Income	\$18,378.27	

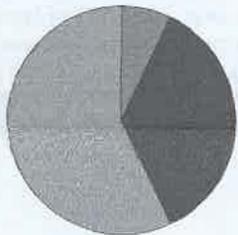
<sup>1</sup> Net Change in Portfolio is the difference between the ending account value and beginning account value after activity.

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**The Bank Deposits in your account are FDIC insured bank deposits.**

FDIC insured bank deposits are not securities and are not covered by the Securities Investor Protection Corporation (SIPC). These bank deposits are covered by the Federal Deposit Insurance Corporation (FDIC), up to allowable limits.

**Asset Summary**



Percent	Asset Type	Prior Year-End	Last Period	This Period
7%	Cash, Money Funds, and Bank Deposits	49,732.24	76,934.46	78,102.35
36%	Fixed Income	391,337.10	443,689.00	442,486.85
57%	Mutual Funds	756,028.24	687,289.92	696,102.63
<b>100%</b>	<b>Account Total (Pie Chart)</b>	<b>\$1,197,097.58</b>	<b>\$1,207,913.38</b>	<b>\$1,216,691.83</b>

Please review your allocation periodically with your Financial Advisor.



NORTHWEST SPECIAL RECREATION ASSOCIATION  
SPECIAL LEISURE SERVICES FOUNDATION

**ORGANIZATIONAL CASH OVERVIEW OCTOBER 31, 2017**

		<u>NWSRA</u>	<u>SLSF</u>	<u>TOTAL</u>
<b><u>WORKING CASH</u></b>				
	PETTY CASH	\$ 500	150	\$ 650
	BSN CHECKING (Village Bank & Trust)	459,171	378,881	838,053
	OPER/MMA (Village Bank & Trust)	1,105,867		1,105,867
	IPDLAF	140,872		140,872
	CASH BANKS	-	-	-
	TOTAL	<u>1,706,411</u>	<u>379,031</u>	<u>2,085,442</u>
<b><u>RESERVES: INVESTMENTS</u></b>				
	BF EDWARDS		1,197,632	1,197,632
	PFM Asset Management	1,379,168		1,379,168
	TOTAL	<u>1,379,168</u>	<u>1,197,632</u>	<u>2,576,801</u>
<b><u>RESERVES:</u></b>				
	<b><u>OPERATING</u></b>			
	<b><u>CAPITAL</u></b>			
	MAX SAFE 1 (Village Bank & Trust)	1,333,918		1,333,918
	MAX SAFE 2 (Village Bank & Trust)	191,132		191,132
	SMALL BUS (Village Bank & Trust)	-		-
	TOTAL	<u>1,525,050</u>		<u>1,525,050</u>
<b><u>TOTAL CASH &amp; RESERVES</u></b>				
	<b>October 31, 2017</b>	<u>\$ 4,610,629</u>	<u>\$ 1,576,664</u>	<u>\$ 6,187,293</u>
 <b><u>TOTAL CASH &amp; RESERVES</u></b>				
	<b>October 31, 2016</b>			
	CASH	\$ 1,993,465	\$ 175,459	\$ 2,168,924
	CASH BANKS	-	1,660	1,660
	RESERVES - OPER	1,268,813		1,268,813
	RESERVES - CAP	91,829		91,829
	RESERVES - INVEST	1,267,169	1,347,222	2,614,391
		<u>\$ 4,621,276</u>	<u>\$ 1,524,341</u>	<u>\$ 6,145,617</u>

NORTHWEST SPECIAL RECREATION ASSOCIATION  
SPECIAL LEISURE SERVICES FOUNDATION

**ORGANIZATIONAL CASH OVERVIEW NOVEMBER 30, 2017**

		<u>NWSRA</u>	<u>SLSF</u>	<u>TOTAL</u>
<b><u>WORKING CASH</u></b>				
	PETTY CASH	\$ 500	\$ 150	\$ 650
	BSN CHECKING (Village Bank & Trust)	121,173	399,798	520,970
	OPER/MMA (Village Bank & Trust)	1,532,432		1,532,432
	IPDLAF	105,864		105,864
	CASH BANKS		-	0
	TOTAL	<u>1,759,969</u>	<u>399,948</u>	<u>2,159,916</u>
<b><u>RESERVES: INVESTMENTS</u></b>				
	BF EDWARDS		1,207,913	1,207,913
	PFM Asset Management	<u>1,379,002</u>		<u>1,379,002</u>
	TOTAL	<u>1,379,002</u>	<u>1,207,913</u>	<u>2,586,915</u>
<b><u>RESERVES:</u></b>				
	<b><u>OPERATING</u></b>			
	<b><u>CAPITAL</u></b>			
	MAX SAFE 1 (Village Bank & Trust)	1,334,960		1,334,960
	MAX SAFE 2 (Village Bank & Trust)	191,273		191,273
	SMALL BUS (Village Bank & Trust)	-		-
	TOTAL	<u>1,526,233</u>		<u>1,526,233</u>
<b><u>TOTAL CASH &amp; RESERVES</u></b>				
	<b>November 30, 2017</b>	<u>\$ 4,665,203</u>	<u>\$ 1,607,861</u>	<u>\$ 6,273,064</u>
 <b><u>TOTAL CASH &amp; RESERVES</u></b>				
	<b>November 30, 2016</b>			
	CASH	\$ 1,983,784	\$ 204,498	\$ 2,188,282
	CASH BANKS	-	-	-
	RESERVES - OPER	1,268,918		1,268,918
	RESERVES - CAP	91,830		91,830
	RESERVES - INVEST	<u>1,267,022</u>	<u>1,361,614</u>	<u>2,628,636</u>
		<u>\$ 4,611,554</u>	<u>\$ 1,566,112</u>	<u>\$ 6,177,666</u>

NORTHWEST SPECIAL RECREATION ASSOCIATION  
SPECIAL LEISURE SERVICES FOUNDATION

**ORGANIZATIONAL CASH OVERVIEW DECEMBER 31, 2017**

		<u>NWSRA</u>	<u>SLSF</u>	<u>TOTAL</u>
<b><u>WORKING CASH</u></b>				
	PETTY CASH	\$ 500	\$ 150	\$ 650
	BSN CHECKING (Village Bank & Trust)	172,196	301,639	473,835
	OPER/MMA (Village Bank & Trust)	1,640,479		1,640,479
	IPDLAF	71,041		71,041
	CASH BANKS			0
	TOTAL	<u>1,884,216</u>	<u>301,789</u>	<u>2,186,005</u>
<b><u>RESERVES: INVESTMENTS</u></b>				
	BF EDWARDS		1,216,692	1,216,692
	PFM Asset Management	1,379,458		1,379,458
	TOTAL	<u>1,379,458</u>	<u>1,216,692</u>	<u>2,596,150</u>
<b><u>RESERVES:</u></b>				
	<b><u>OPERATING</u></b>			
	<b><u>CAPITAL</u></b>			
	MAX SAFE 1 (Village Bank & Trust)	1,336,037		1,336,037
	MAX SAFE 2 (Village Bank & Trust)	191,419		191,419
	SMALL BUS (Village Bank & Trust)	0		0
	TOTAL	<u>1,527,456</u>		<u>1,527,456</u>
<b><u>TOTAL CASH &amp; RESERVES</u></b>				
	<b>December 31, 2017</b>	<u>\$ 4,791,130</u>	<u>\$ 1,518,481</u>	<u>\$ 6,309,611</u>
 <b><u>TOTAL CASH &amp; RESERVES</u></b>				
	<b>December 31, 2016</b>			
	CASH	\$ 2,130,441	\$ 239,778	\$ 2,370,219
	CASH BANKS	-	-	-
	RESERVES - OPER	1,269,026		1,269,026
	RESERVES - CAP	91,831		91,831
	RESERVES - INVEST	1,271,525	1,197,098	2,468,623
		<u>\$ 4,762,823</u>	<u>\$ 1,436,876</u>	<u>\$ 6,199,699</u>

SPECIAL LEISURE SERVICES FOUNDATION

BUDGET VS ACTUAL and CASH BALANCE

OCTOBER 31, 2017

(A) BUDGET VS ACTUAL	REVENUE			EXPENSES			EXCESS REVENUE (EXPENSE)		
	MONTH	BUDGET	ACTUAL	OVER (UNDER)	BUDGET	ACTUAL	OVER (UNDER)	BUDGET	ACTUAL
January	169,967	64,656	(105,312)	11,231	8,082	(3,150)	158,736	56,574	(102,162)
February	98,564	57,648	(40,916)	15,015	25,816	10,801	83,549	31,832	(51,717)
March	36,528	17,950	(18,578)	102,393	8,020	(94,373)	(65,865)	9,930	75,795
April	16,678	31,728	15,050	2,793	32,157	29,363	13,885	(429)	(14,314)
May	32,778	74,698	41,920	107,717	137,427	29,709	(74,939)	(62,728)	12,211
June	30,200	29,954	(246)	100,460	76,880	(23,581)	(70,261)	(46,926)	23,335
July	18,678	33,533	14,854	5,901	131,130	125,229	12,777	(97,598)	(110,375)
August	36,408	45,079	8,671	1,450	34,836	33,386	34,958	10,243	(24,716)
September	124,658	59,744	(64,914)	117,048	9,155	(107,893)	7,610	50,589	42,978
<b>October</b>	<b>36,350</b>	<b>282,532</b>	<b>246,182</b>	<b>118,657</b>	<b>78,217</b>	<b>(40,440)</b>	<b>(82,308)</b>	<b>204,315</b>	<b>286,622</b>
November	72,660		(72,660)	17,117		(17,117)	55,542	0	(55,542)
December	32,211		(32,211)	105,366		(105,366)	(73,156)	0	73,156
<b>TOTAL YTD</b>	<b>600,810</b>	<b>697,521</b>	<b>96,711</b>	<b>582,666</b>	<b>541,719</b>	<b>(40,947)</b>	<b>18,143</b>	<b>155,802</b>	<b>137,659</b>

(B) CASH BALANCE	BEGINNING OF	EXCESS REV.	NON-CASH	NON CASH	BALANCE SHEET	END OF
	MONTH	(EXP.) FOR MONTH	REVENUE	EXPENSES	TRANSACTIONS	MONTH
January	1,436,876	56,574	(15,500)	0	(50)	1,477,900
February	1,477,900	31,832	0	0	(62)	1,509,670
March	1,509,670	9,930	112	0	0	1,519,712
April	1,519,712	(429)	0	0	(200)	1,519,083
May	1,519,083	(62,728)	0	1,500 a	(250)	1,457,605
June	1,457,605	(46,926)	0	0	(750)	1,409,929
July	1,409,929	(97,598)	0	0	0	1,312,332
August	1,312,332	10,243	0	0	500	1,323,074
September	1,323,074	50,589	0	0	0	1,373,663
<b>October</b>	<b>1,373,663</b>	<b>204,315</b>	<b>0</b>	<b>0</b>	<b>250</b>	<b>1,578,228</b>
November	1,578,228	0				1,578,228
December	1,578,228	0				1,578,228

a) Oversight during audit - \$1,499.97 Prepaid expense reversal from 2013 & 2015

SPECIAL LEISURE SERVICES FOUNDATION

BUDGET VS ACTUAL - SUMMARY BY TYPE

TEN MONTHS ENDING OCTOBER 31, 2017

	2017			2016 PRIOR YR ACTUAL
	ACTUAL	BUDGET	OVER (UNDER)	
<b><u>REVENUE</u></b>				
GRANTS	259,529	61,780	197,748	96,343
RESTRICTED FUNDRAISING	59,221	52,029	7,191	56,930
RESTRICTED DONATIONS	438	2,633	(2,196)	2,990
UNRESTRICTED FUNDRAISING	220,479	182,525	37,954	216,738
UNRESTRICTED DONATIONS	32,259	26,750	5,509	29,386
INVESTMENT TRANSFER	275,000	275,000	0	0
TOTAL REVENUE	846,924	600,718	246,206	402,386
<b><u>EXPENDITURES</u></b>				
ADMINISTRATION	37,416	37,334	82	27,022
RESTRICTED FUNDRAISING	10,900	12,880	(1,980)	11,219
UNRESTRICTED FUNDRAISING	57,552	74,119	(16,567)	65,800
GRANTS GIVEN	434,351	458,333	(23,982)	198,614
RECONCILIATION DISCREPANCY	1,500 <sup>a</sup>	0	1,500	0
TOTAL EXPENSES	541,719	582,666	(40,947)	302,656
<b><u>OPERATING</u></b>				
EXCESS REVENUE (EXPENSES)	305,205	18,052	287,154	99,730
<b><u>INVESTMENT INCOME (LOSS)</u></b>	125,597	92	125,505	49,103
*				
<b><u>NET EXCESS REVENUE (EXPENSE)</u></b>	\$ 430,802	\$ 18,143	\$ 412,659	\$ 148,833

\*includes BF Edwards Investment Income and Interest Income from BAC account

SPECIAL LEISURE SERVICES FOUNDATION

BUDGET VS ACTUAL and CASH BALANCE

NOVEMBER 30, 2017

(A) BUDGET VS ACTUAL	REVENUE			EXPENSES			EXCESS REVENUE (EXPENSE)		
	MONTH	BUDGET	ACTUAL	OVER (UNDER)	BUDGET	ACTUAL	OVER (UNDER)	BUDGET	ACTUAL
January	169,967	64,656	(105,312)	11,231	8,082	(3,150)	158,736	56,574	(102,162)
February	98,564	57,648	(40,916)	15,015	25,816	10,801	83,549	31,832	(51,717)
March	36,528	17,950	(18,578)	102,393	8,020	(94,373)	(65,865)	9,930	75,795
April	16,678	31,728	15,050	2,793	32,157	29,363	13,885	(429)	(14,314)
May	32,778	74,698	41,920	107,717	137,427	29,709	(74,939)	(62,728)	12,211
June	30,200	29,954	(246)	100,460	76,880	(23,581)	(70,261)	(46,926)	23,335
July	18,678	33,533	14,854	5,901	131,130	125,229	12,777	(97,598)	(110,375)
August	36,408	45,079	8,671	1,450	34,836	33,386	34,958	10,243	(24,716)
September	124,658	59,744	(64,914)	117,048	9,155	(107,893)	7,610	50,589	42,978
October	36,350	282,532	246,182	118,657	78,217	(40,440)	(82,308)	204,315	286,622
<b>November</b>	<b>72,660</b>	<b>71,972</b>	<b>(687)</b>	<b>17,117</b>	<b>40,659</b>	<b>23,542</b>	<b>55,542</b>	<b>31,313</b>	<b>(24,229)</b>
December	32,211		(32,211)	105,366		(105,366)	(73,156)	0	73,156
<b>TOTAL YTD</b>	<b>673,469</b>	<b>769,493</b>	<b>96,024</b>	<b>599,784</b>	<b>582,378</b>	<b>(17,406)</b>	<b>73,686</b>	<b>187,115</b>	<b>113,430</b>

(B) CASH BALANCE

	BEGINNING OF	EXCESS REV.	NON-CASH	NON CASH	BALANCE SHEET	END OF
	MONTH	(EXP.) FOR MONTH	REVENUE	EXPENSES	TRANSACTIONS	MONTH
January	1,436,876	56,574	(15,500)	0	(50)	1,477,900
February	1,477,900	31,832	0	0	(62)	1,509,670
March	1,509,670	9,930	112	0	0	1,519,712
April	1,519,712	(429)	0	0	(200)	1,519,083
May	1,519,083	(62,728)	0	1,500 a	(250)	1,457,605
June	1,457,605	(46,926)	0	0	(750)	1,409,929
July	1,409,929	(97,598)	0	0	0	1,312,332
August	1,312,332	10,243	0	0	500	1,323,074
September	1,323,074	50,589	0	0	0	1,373,663
October	1,373,663	204,315	0	0	250	1,578,228
<b>November</b>	<b>1,578,228</b>	<b>31,313</b>	<b>0</b>	<b>0</b>	<b>200</b>	<b>1,609,741</b>
December	1,609,741	0				1,609,741

a) Oversight during audit - \$1,499.97 Prepaid expense reversal from 2013 & 2015

SPECIAL LEISURE SERVICES FOUNDATION

BUDGET VS ACTUAL - SUMMARY BY TYPE

ELEVEN MONTHS ENDING NOVEMBER 30, 2017

	2017			2016
	ACTUAL	BUDGET	OVER (UNDER)	
<b><u>REVENUE</u></b>				
GRANTS	270,362	68,640	201,722	98,658
RESTRICTED FUNDRAISING	59,221	55,085	4,136	56,930
RESTRICTED DONATIONS	3,070	2,633	436	2,990
UNRESTRICTED FUNDRAISING	266,313	245,260	21,053	245,214
UNRESTRICTED DONATIONS	34,651	26,750	7,901	36,766
INVESTMENT TRANSFER	275,000	275,000	0	0
TOTAL REVENUE	908,616	673,368	235,247	440,558
<b><u>EXPENDITURES</u></b>				
ADMINISTRATION	39,777	37,964	1,813	28,669
RESTRICTED FUNDRAISING	11,409	12,880	(1,471)	11,704
UNRESTRICTED FUNDRAISING	95,341	90,606	4,734	88,663
GRANTS GIVEN	434,351	458,333	(23,982)	199,234
RECONCILIATION DISCREPANCY	1,500 <sup>a</sup>	0	1,500	0
TOTAL EXPENSES	582,378	599,784	(17,406)	328,270
<b><u>OPERATING</u></b>				
EXCESS REVENUE (EXPENSES)	326,238	73,585	252,653	112,287
<b><u>INVESTMENT INCOME (LOSS)</u></b>	135,878	101	135,777	63,504
*				
<b><u>NET EXCESS REVENUE (EXPENSE)</u></b>	\$ 462,115	\$ 73,686	\$ 388,430	\$ 175,791

\*includes BF Edwards Investment Income and Interest Income from BAC account

SPECIAL LEISURE SERVICES FOUNDATION

BUDGET VS ACTUAL and CASH BALANCE

DECEMBER 31, 2017

(A) BUDGET VS ACTUAL	REVENUE			EXPENSES			EXCESS REVENUE (EXPENSE)		
	MONTH	BUDGET	ACTUAL	OVER (UNDER)	BUDGET	ACTUAL	OVER (UNDER)	BUDGET	ACTUAL
January	169,967	64,656	(105,312)	11,231	8,082	(3,150)	158,736	56,574	(102,162)
February	98,564	57,648	(40,916)	15,015	25,816	10,801	83,549	31,832	(51,717)
March	36,528	17,950	(18,578)	102,393	8,020	(94,373)	(65,865)	9,930	75,795
April	16,678	31,728	15,050	2,793	32,157	29,363	13,885	(429)	(14,314)
May	32,778	74,698	41,920	107,717	137,427	29,709	(74,939)	(62,728)	12,211
June	30,200	29,954	(246)	100,460	76,880	(23,581)	(70,261)	(46,926)	23,335
July	18,678	33,530	14,851	5,901	131,127	125,226	12,777	(97,598)	(110,375)
August	36,408	45,079	8,671	1,450	34,836	33,386	34,958	10,243	(24,716)
September	124,658	59,744	(64,914)	117,048	9,154	(107,894)	7,610	50,590	42,980
October	36,350	282,532	246,182	118,657	78,217	(40,440)	(82,308)	204,315	286,622
November	72,660	73,293	634	17,117	41,980	24,862	55,542	31,313	(24,229)
<b>December</b>	<b>32,211</b>	<b>(203,486)</b>	<b>(235,696)</b>	<b>105,366</b>	<b>123,116</b>	<b>17,749</b>	<b>(73,156)</b>	<b>(326,601)</b>	<b>(253,446)</b>
TOTAL YTD	705,680	567,325	(138,355)	705,150	706,810	1,660	530	(139,485)	(140,015)

(B) CASH BALANCE	BEGINNING OF	EXCESS REV.	NON-CASH	NON CASH	BALANCE SHEET	END OF
	MONTH	(EXP.) FOR MONTH	REVENUE	EXPENSES	TRANSACTIONS	MONTH
January	1,436,876	56,574	(15,500)	0	(50)	1,477,900
February	1,477,900	31,832	0	0	(62)	1,509,670
March	1,509,670	9,930	112	0	0	1,519,712
April	1,519,712	(429)	0	0	(200)	1,519,083
May	1,519,083	(62,728)	0	1,500 a	(250)	1,457,605
June	1,457,605	(46,926)	0	0	(750)	1,409,929
July	1,409,929	(97,598)	0	0	0	1,312,332
August	1,312,332	10,243	0	0	500	1,323,074
September	1,323,074	50,590	0	0	(40)	1,373,624
October	1,373,624	204,315	0	0	250	1,578,189
November	1,578,189	31,313	0	0	200	1,609,702
<b>December</b>	<b>1,609,702</b>	<b>(326,601)</b>	<b>235,140</b>	<b>0</b>	<b>250</b>	<b>1,518,491</b>

a) Oversight during audit - \$1,499.97 Prepaid expense reversal from 2013 & 2015

SPECIAL LEISURE SERVICES FOUNDATION

BUDGET VS ACTUAL - SUMMARY BY TYPE

TWELVE MONTHS ENDING DECEMBER 31, 2017

	2017			2016 PRIOR YR ACTUAL
	ACTUAL	BUDGET	OVER (UNDER)	
<b><u>REVENUE</u></b>				
GRANTS	50,195	75,500	(25,305)	104,816
RESTRICTED FUNDRAISING	58,221	55,910	2,311	56,930
RESTRICTED DONATIONS	16,890	3,900	12,990	2,990
UNRESTRICTED FUNDRAISING	257,656	245,260	12,396	246,009
UNRESTRICTED DONATIONS	39,708	50,000	(10,292)	54,872
INVESTMENT TRANSFER	275,000	275,000	0	0
TOTAL REVENUE	697,669	705,570	(7,901)	465,616
<b><u>EXPENDITURES</u></b>				
ADMINISTRATION	48,561	48,995	(434)	34,423
RESTRICTED FUNDRAISING	11,409	12,880	(1,471)	11,704
UNRESTRICTED FUNDRAISING	95,341	93,275	2,066	90,935
GRANTS GIVEN	550,000	550,000	0	355,196
RECONCILIATION DISCREPANCY	1,500 <sup>a</sup>	0	1,500	0
TOTAL EXPENSES	706,810	705,150	1,660	492,257
<b><u>OPERATING</u></b>				
EXCESS REVENUE (EXPENSES)	(9,141)	420	(9,561)	(26,641)
<b><u>INVESTMENT INCOME (LOSS)</u></b>	144,656	110	144,546	70,545
*				
<b><u>NET EXCESS REVENUE (EXPENSE)</u></b>	\$ 135,515	\$ 530	\$ 134,985	\$ 43,904

\*includes BF Edwards Investment Income and Interest Income from BAC account

Special Leisure Services Foundation  
**Balance Sheet**  
As of October 31, 2017

	<u>Oct 31, 17</u>
<b>ASSETS</b>	
Current Assets	
Checking/Savings	
10100 · Petty Cash	150.00
10300 · VB&T Checking	378,881.15
11300 · BENJAMIN EDWARDS	
11310 · Investments-Cash	76,907.93
11300 · BENJAMIN EDWARDS - Other	1,120,724.55
<b>Total 11300 · BENJAMIN EDWARDS</b>	<u>1,197,632.48</u>
11820 · Credit Card - MasterCard	-92.99
11830 · Credit Card - Visa	1,225.62
11840 · Credit Card - On-Line	431.37
<b>Total Checking/Savings</b>	<u>1,578,227.63</u>
Other Current Assets	
12200 · Event Deposits	450.00
<b>Total Other Current Assets</b>	<u>450.00</u>
<b>Total Current Assets</b>	<u>1,578,677.63</u>
<b>TOTAL ASSETS</b>	<u><u>1,578,677.63</u></u>
<b>LIABILITIES &amp; EQUITY</b>	
Equity	
29000 · Retained Earnings	1,405,392.68
29200 · Net Assets-Temp. Restricted	17,483.05
Net Income	155,801.90
<b>Total Equity</b>	<u>1,578,677.63</u>
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<u><u>1,578,677.63</u></u>

Special Leisure Services Foundation  
**Balance Sheet**  
As of November 30, 2017

	<u>Nov 30, 17</u>
<b>ASSETS</b>	
Current Assets	
Checking/Savings	
10100 · Petty Cash	150.00
10300 · VB&T Checking	399,797.54
11300 · BENJAMIN EDWARDS	
11310 · Investments-Cash	76,934.46
11300 · BENJAMIN EDWARDS - Other	1,130,978.92
<b>Total 11300 · BENJAMIN EDWARDS</b>	<u>1,207,913.38</u>
11810 · Credit Card - Discover	120.00
11820 · Credit Card - MasterCard	1,605.00
11830 · Credit Card - Visa	155.00
<b>Total Checking/Savings</b>	<u>1,609,740.92</u>
Other Current Assets	
12200 · Event Deposits	250.00
<b>Total Other Current Assets</b>	<u>250.00</u>
<b>Total Current Assets</b>	<u>1,609,990.92</u>
<b>TOTAL ASSETS</b>	<b><u>1,609,990.92</u></b>
<b>LIABILITIES &amp; EQUITY</b>	
Equity	
29000 · Retained Earnings	1,405,392.68
29200 · Net Assets-Temp. Restricted	17,483.05
Net Income	187,115.19
<b>Total Equity</b>	<u>1,609,990.92</u>
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<b><u>1,609,990.92</u></b>

Special Leisure Services Foundation  
**Balance Sheet**  
As of December 31, 2017

	<u>Dec 31, 17</u>
<b>ASSETS</b>	
Current Assets	
Checking/Savings	
10100 · Petty Cash	150.00
10300 · VB&T Checking	301,638.87
11300 · BENJAMIN EDWARDS	
11310 · Investments-Cash	78,102.35
11300 · BENJAMIN EDWARDS - Other	<u>1,138,589.48</u>
Total 11300 · BENJAMIN EDWARDS	1,216,691.83
11800 · Credit Card - American Express	-20.00
11830 · Credit Card - Visa	<u>30.00</u>
Total Checking/Savings	1,518,490.70
Other Current Assets	
12300 · ACCOUNTS RECEIVABLE-OTHER	<u>40.00</u>
Total Other Current Assets	40.00
Total Current Assets	<u>1,518,530.70</u>
<b>TOTAL ASSETS</b>	<b><u>1,518,530.70</u></b>
<b>LIABILITIES &amp; EQUITY</b>	
Liabilities	
Current Liabilities	
Other Current Liabilities	
21200 · Deferred Revenue	<u>235,140.00</u>
Total Other Current Liabilities	<u>235,140.00</u>
Total Current Liabilities	<u>235,140.00</u>
Total Liabilities	235,140.00
Equity	
29000 · Retained Earnings	1,405,392.68
29200 · Net Assets-Temp. Restricted	17,483.05
Net Income	<u>-139,485.03</u>
Total Equity	<u>1,283,390.70</u>
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<b><u>1,518,530.70</u></b>

**SLSF  
FY 2017  
Financial Report  
January-December 2017**

Line Item #	Description	FY 2017 Budget	Jan - Dec 2017	% Change from Budget	Explanation
<b>Income</b>					
31110	Interest Income	110.00	61.80	56.2%	Change of banks, VB&T checking is a non-interest bearing account.
31200	Grants Received	75,500.00	50,195.16	66.5%	A \$221,000 grant is being booked to 2018 since the monies will be spent in that year. The \$5000 grant from Chicago Bulls Charities has not yet been received. The grant from Elk Grove Township is paid April through March so three months of payments will be made in 2018.
31300	Restricted Fundraising	55,910.00	58,220.50	104.1%	On target
31400	Restricted Donations	3,900.00	16,889.64	433.1%	Both the Spring and the Holiday Appeals were restricted which resulted in a higher than budgeted amount in restricted donations.
32300	Unrestricted Fundraising	245,260.00	257,655.60	105.1%	On target
32400	Unrestricted Donations	50,000.00	39,708.39	79.4%	The Holiday Appeal was restricted in 2017 resulting a lower total number of unrestricted individual donations.
33700	Investment Transfer	275,000.00	275,000.00	100.0%	The investment transfer was completed in the third quarter of this year.
	<b>Total Revenue</b>	<b>705,680.00</b>	<b>697,731.09</b>	<b>98.9%</b>	On target
<b>Expense</b>					
<b>Administration</b>					
40100	Postage	6,000.00	3,722.28	62.0%	SLSF budgeted to send more direct mail in 2017, but didn't spend as much as anticipated.
40200	Office Expense	3,000.00	2,207.04	73.6%	SLSF was careful to use existing office supplies instead of purchasing new items.
40250	Credit Card Fees	4,500.00	5,001.47	111.1%	SLSF credit card costs have risen due to more people using credit cards to pay for registrations, auctions and donations. The Gala is exclusively credit card payments.
40400	Professional Memberships	1,570.00	1,713.00	109.1%	The new Event Coordinator joined the Jaycees which was an unbudgeted expense.
40500	Education/Training	700.00	672.50	96.1%	On target
40600	Public Education/Information	16,000.00	18,789.82	117.4%	SLSF spent additional monies meeting with potential donors as well as having a record number of attendees at the Holiday Luncheon resulting in higher food costs.
40700	Printing	3,000.00	2,677.00	89.2%	SLSF printed the spring annual appeal in-house which resulted in a savings of \$250.
40800	Professional Fees	14,225.00	13,777.47	96.9%	On target
41300	Fundraising Restricted	12,880.00	11,409.07	88.6%	Attendance at the Palatine Hills Outing was down slightly in 2017 resulting in a savings on food costs.
42300	Fundraising Unrestricted	93,275.00	95,340.75	102.2%	On target
	<b>Subtotal</b>	<b>155,150.00</b>	<b>155,310.40</b>	<b>100.1%</b>	
<b>Grants Given</b>					
43100	NWSRA Lightning Athletes	30,000.00	25,147.68	83.8%	Through careful shopping, NWSRA bought uniforms at a better price than anticipated resulting in savings in this line item. NWSRA also saved money on busing for State Summer Games by hiring only two buses rather than three.
43200	Accessible Vehicles	48,000.00	61,485.00	128.1%	SLSF gave a higher than budgeted amount to NWSRA to purchase a vehicle. Monies not spent on scholarships and athletics made that possible.
43300	Scholarships	70,000.00	63,873.54	91.2%	NWSRA received fewer scholarship requests than anticipated.
43400	Inclusion/ADA Compliance	39,000.00	39,004.10	100.0%	On target
43500	General Program Support	88,000.00	85,489.68	97.1%	On target
43650	Capital Improvements	275,000.00	275,000.00	100.0%	These dollars were paid to build the accessible ramp at the HPPD community center.
	<b>Subtotal</b>	<b>550,000.00</b>	<b>550,000.00</b>	<b>100.0%</b>	On target
	<b>Total Expense</b>	<b>705,150.00</b>	<b>705,310.40</b>	<b>100.0%</b>	On target
	<b>Net Total</b>	<b>530.00</b>	<b>(7,579.31)</b>	<b>-1430.1%</b>	

# VIII. Warrants

[Back to Home](#)

**Special Leisure Services Foundation**

**Warrant #11**

**November 30, 2017**

<b>Num</b>	<b>Name</b>	<b>Account</b>	<b>Amount</b>
25048	Secretary of State	<b>10300 · VB&amp;T Checking</b>	<b>-10.00</b>
		40800 · Professional Fees	10.00
			<u>10.00</u>
25049	Rotary Club of Schaumburg/H.E.	<b>10300 · VB&amp;T Checking</b>	<b>-102.00</b>
		40600 · Public Education/Information	102.00
			<u>102.00</u>
25050	BMO Harris Bank Mastercard	<b>10300 · VB&amp;T Checking</b>	<b>-33.35</b>
		40250 · Credit Card fees	33.35
			<u>33.35</u>
25051	BMO Harris Bank Mastercard	<b>10300 · VB&amp;T Checking</b>	<b>-3,467.74</b>
		40600 · Public Education/Information	109.24
		42320 · Food	1,258.50
		42320 · Food	2,100.00
			<u>3,467.74</u>
25052	BMO Harris Bank Mastercard	<b>10300 · VB&amp;T Checking</b>	<b>-128.66</b>
		40200 · Office Expense	22.97
		42380 · Supplies	28.30
		42380 · Supplies	37.91
		40200 · Office Expense	19.99
		42380 · Supplies	19.49
			<u>128.66</u>
25053	Connect to Community	<b>10300 · VB&amp;T Checking</b>	<b>-100.00</b>
		40600 · Public Education/Information	100.00
			<u>100.00</u>
25054	Cash/Nanette Sowa	<b>10300 · VB&amp;T Checking</b>	<b>-1,660.00</b>
		10400 · Cash Banks	1,660.00
			<u>1,660.00</u>
25055	Michael Montoya	<b>10300 · VB&amp;T Checking</b>	<b>-400.00</b>
		42380 · Supplies	400.00
			<u>400.00</u>
25056	Rotary Club of Arlington Heights	<b>10300 · VB&amp;T Checking</b>	<b>-10,963.89</b>
		42340 · Recognition	10,963.89
			<u>10,963.89</u>
25057	Michelle Stuercke	<b>10300 · VB&amp;T Checking</b>	<b>-500.00</b>
		42350 · Prizes	500.00
			<u>500.00</u>
25058	Jeffrey Quattrochi	<b>10300 · VB&amp;T Checking</b>	<b>-1,000.00</b>
		42350 · Prizes	1,000.00
			<u>1,000.00</u>
25059	Terry DaPisa	<b>10300 · VB&amp;T Checking</b>	<b>-3,000.00</b>
		42350 · Prizes	3,000.00
			<u>3,000.00</u>

**Special Leisure Services Foundation**

**Warrant #11**

**November 30, 2017**

<b>Num</b>	<b>Name</b>	<b>Account</b>	<b>Amount</b>
<b>25060</b>	<b>BMO Harris Bank Mastercard</b>	<b>10300 · VB&amp;T Checking</b>	<b>-5,157.07</b>
		42320 · Food	1,147.00
		42370 · Printing	780.59
		40600 · Public Education/Information	6.26
		40600 · Public Education/Information	7.50
		40600 · Public Education/Information	22.48
		40600 · Public Education/Information	440.00
		40200 · Office Expense	461.80
		42350 · Prizes	187.86
		42320 · Food	54.52
		40200 · Office Expense	67.99
		40250 · Credit Card fees	67.36
		41320 · Food	1,806.00
		40600 · Public Education/Information	25.00
		42380 · Supplies	14.74
		40600 · Public Education/Information	35.99
		42380 · Supplies	31.98
			<u>5,157.07</u>
<b>25061</b>	<b>BMO Harris Bank Mastercard</b>	<b>10300 · VB&amp;T Checking</b>	<b>-75.00</b>
		40600 · Public Education/Information	75.00
			<u>75.00</u>
<b>25062</b>	<b>Laurel Katz</b>	<b>10300 · VB&amp;T Checking</b>	<b>-46.82</b>
		41375 · Lightning Athletes Booster Club	46.82
			<u>46.82</u>
<b>25063</b>	<b>Rotary Club of Schaumburg/H.E.</b>	<b>10300 · VB&amp;T Checking</b>	<b>-72.00</b>
		40600 · Public Education/Information	72.00
			<u>72.00</u>
<b>25064</b>	<b>Chevy Chase Country Club</b>	<b>10300 · VB&amp;T Checking</b>	<b>-16,624.66</b>
		42320 · Food	16,624.66
			<u>16,624.66</u>
<b>25065</b>	<b>TPM Graphics, Inc.</b>	<b>10300 · VB&amp;T Checking</b>	<b>-619.00</b>
		42370 · Printing	619.00
			<u>619.00</u>
<b>25066</b>	<b>Rachel Hubsch</b>	<b>10300 · VB&amp;T Checking</b>	<b>-67.64</b>
		41375 · Lightning Athletes Booster Club	67.64
			<u>67.64</u>
<b>25067</b>	<b>Fdn of the Rotary Club of Buffalo</b>	<b>10300 · VB&amp;T Checking</b>	<b>-100.00</b>
		40400 · Professional Memberships	100.00
			<u>100.00</u>
<b>25068</b>	<b>BMO Harris Bank Mastercard</b>	<b>10300 · VB&amp;T Checking</b>	<b>-70.29</b>
		40400 · Professional Memberships	40.00
		42320 · Food	30.29
			<u>70.29</u>
<b>25069</b>	<b>BMO Harris Bank Mastercard</b>	<b>10300 · VB&amp;T Checking</b>	<b>-3,669.34</b>

**Special Leisure Services Foundation**

**Warrant #11**

**November 30, 2017**

<b>Num</b>	<b>Name</b>	<b>Account</b>	<b>Amount</b>
		40600 · Public Education/Information	750.00
		40200 · Office Expense	41.79
		40600 · Public Education/Information	10.53
		40600 · Public Education/Information	176.15
		42380 · Supplies	1,849.00
		41375 · Lightning Athletes Booster Club	79.65
		42380 · Supplies	400.00
		41375 · Lightning Athletes Booster Club	51.04
		41375 · Lightning Athletes Booster Club	311.18
			<u>3,669.34</u>
<b>25071</b>	<b>US Postal Service</b>	<b>10300 · VB&amp;T Checking</b>	<b>-524.94</b>
		40100 · Postage	524.94
			<u>524.94</u>
<b>25072</b>	<b>The Printing Factory</b>	<b>10300 · VB&amp;T Checking</b>	<b>-2,147.00</b>
		42370 · Printing	2,147.00
			<u>2,147.00</u>
<b>25073</b>	<b>Rotary Club of Rolling Meadows</b>	<b>10300 · VB&amp;T Checking</b>	<b>-130.00</b>
		40400 · Professional Memberships	130.00
			<u>130.00</u>
<b>Total for Warrant #11</b>			<b><u>50,669.40</u></b>

**Motion to approve Warrant #11 in the amount of \$ 50,669.40**  
**Covering check numbers 25048 to 25073 from Village Bank & Trust**

**Special Leisure Services Foundation**  
**Warrant #12**  
**December 31, 2017**

Num	Name	Account	Amount
25074	NWSRA	<b>10300 - VB&amp;T Checking</b>	<b>-115,648.66</b>
		43100 · NWSRA Lightning Athletes	4,171.33
		43200 · Accessible Vehicle Support	61,485.00
		43300 · Scholarships	12,202.85
		43400 · Inclusion (ADA Compliance)	13,004.10
		43500 · General Program Support	24,785.38
			<u>115,648.66</u>
25075	Rotary Club of Schaumburg/H.E.	<b>10300 - VB&amp;T Checking</b>	<b>-54.00</b>
		40600 · Public Education/Information	54.00
			<u>54.00</u>
25076	Secretary of State	<b>10300 - VB&amp;T Checking</b>	<b>-25.00</b>
		40800 · Professional Fees	25.00
			<u>25.00</u>
25077	Secretary of State	<b>10300 - VB&amp;T Checking</b>	<b>-5.00</b>
		40800 · Professional Fees	5.00
			<u>5.00</u>
25078	Chandler's	<b>10300 - VB&amp;T Checking</b>	<b>-4,291.35</b>
		40600 · Public Education/Information	4,291.35
			<u>4,291.35</u>
25080	BMO Harris Bank Mastercard	<b>10300 - VB&amp;T Checking</b>	<b>-453.00</b>
		40600 · Public Education/Information	453.00
			<u>453.00</u>
25081	BMO Harris Bank Mastercard	<b>10300 - VB&amp;T Checking</b>	<b>-1,097.36</b>
		40600 · Public Education/Information	61.86
		40600 · Public Education/Information	30.00
		40200 · Office Expense	116.30
		40600 · Public Education/Information	475.00
		40600 · Public Education/Information	112.99
		40600 · Public Education/Information	188.22
		40600 · Public Education/Information	112.99
			<u>1,097.36</u>
25082	US Postal Service	<b>10300 - VB&amp;T Checking</b>	<b>-88.56</b>
		40100 · Postage	88.56
			<u>88.56</u>
25083	NWSRA	<b>10300 - VB&amp;T Checking</b>	<b>-672.04</b>
		40100 · Postage	672.04
			<u>672.04</u>
25089	BMO Harris Bank Mastercard	<b>10300 - VB&amp;T Checking</b>	<b>-27.69</b>
		40250 · Credit Card fees	27.69
			<u>27.69</u>
<b>Total for Warrant #12</b>			<b>122,362.66</b>

Motion to approve Warrant #12 in the amount of \$ 122,362.66  
Covering check number 25074 to 25083 and 25089 from Village Bank & Trust

# **X. New Business**

[Back to Home](#)

**To:** SLSF Board of Directors  
**From:** Tracey Crawford, Executive Director  
**Re:** Installation of Officers  
**Date:** January 16, 2018

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**Motion:**

A motion to approve the Installation of Officers:

- A. Jim Houser – Chairman
- B. Kathy Nowicki – Vice Chairman
- C. Amy Charlesworth – Secretary/Organizational Treasurer

**SPECIAL LEISURE SERVICES FOUNDATION  
2018 BOARD TERMS**

January 16, 2018

**TERMS**

**2016-2018**

Kathy Nowicki –  
Vice Chair  
Anthony Gattuso  
Al Crook  
Dennis Stein

**2017-2019**

Jim Houser –Chair  
Terri Oates  
Tom Perkins  
Amy Charlesworth  
Mike Clark  
Wendy Aguilera  
Blanchette

**2018-2020**

Carl Arthur – Past Chair  
Tom Campone  
Jacky Cartwright  
Dennis Hanson  
Brian Rubin  
Vicki Carney  
Jonathan Salk  
Tony LaFrenere

<b><u>Executive Committee</u></b>	<b><u>Investment Committee</u></b>
Jim Houser – Chair	Jim Houser – Chair
Kathy Nowicki – Vice Chair	Kathy Nowicki – Vice Chair
Carl Arthur – Past Chair	Carl Arthur – Past Chair
Tracey Crawford – President	Tracey Crawford – President
Amy Charlesworth – Secretary and Organizational Treasurer	Vicki Carney
	Anthony Gattuso
	Wendy Aguilera Blanchette

**To:** SLSF Foundation Board  
**From:** Tracey Crawford, Executive Director  
**Re:** Appointment of Legal Council  
**Date:** January 16, 2018

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**Motion:**

A motion to approve:

Legal Council appointments:

A. Robbins, Schwartz, Nicholas, Lifton & Taylor, Ltd. – Heidi Katz

Resolution R2018-4:

B. Resolution R2018-4 – Change of Registered Agent

**RESOLUTION R2018-3**

**APPOINTMENT OF NORTHWEST SPECIAL RECREATION ASSOCIATION REPRESENTATIVE AND PRESIDENT OF THE SPECIAL LEISURE SERVICES FOUNDATION**

**WHEREAS**, the Association is committed to quality leisure services for the area's special residents, and,

**WHEREAS**, the Association recognizes the importance of involving the private sector in assisting in the delivery of public services, and,

**WHEREAS**, the Association believes it to be appropriate to make every effort to be fiscally responsible,

**NOW THEREFORE BE IT RESOLVED**, that the Board of Trustees appoint Tracey Crawford as their representative and the President of the Special Leisure Services Foundation and encourage her to work in cooperation with the private sector to assist in providing resources that will increase the availability of leisure services to the area's special populations. Upon roll being called the vote was as follows:

AYE:

NAY:

ABSENT:

Attest \_\_\_\_\_ Board of Trustees Secretary,  
Northwest Special Recreation Association

**Dated this 16<sup>th</sup> day of January, 2018**

To: SLSF Board of Directors

From: Tracey Crawford

Re: BF Edwards Reverse Notification Resolution R2018-1

Date: January 16, 2018

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Motion:

A motion to approve the Benjamin F. Edwards Reverse Notification Resolution R2018-1 as presented.

RESOLUTION R2018-1  
 BENJAMIN F. EDWARDS & CO.  
 REVERSE NOTIFICATION

BE IT FURTHER RESOLVED, THAT, if for any reason the Special Leisure Services Foundation Board of Directors opt to withdraw funds from Benjamin F. Edwards & Co. account, there would first have to be a Board resolution indicating those instructions to Benjamin F. Edwards & Co. Benjamin F. Edwards & Co. shall then send a reverse notification to the home addresses of the President of the Foundation, the Chairman of the Foundation, the Treasurer of the Foundation, NWSRA Director, the NWSRA Chairman and the Organizational Treasurer of the Foundation. After such reverse notification Benjamin F. Edwards & Co. will then process the request for withdrawal.

\_\_\_\_\_  
 Jim Houser, Chairman

Date: January 16, 2018

\_\_\_\_\_  
 Amy L. Charlesworth, Organizational Treasurer

Date: January 16, 2018

President of the Foundation Tracey Crawford 743 Cameron Drive Antioch, IL 60002	Director of NWSRA Tracey Crawford 743 Cameron Drive Antioch, IL 60002
Chair of the Foundation Jim Houser 415 Bernadette Lane Batavia, IL 60510	Chairman of NWSRA Diane Hilgers 51 S Belle Ave Palatine, IL 60074
Vice Chair of the Foundation Kathy Nowicki 56 Cantal Ct Wheeling, IL 60090	Organizational Treasurer of the Foundation Amy L. Charlesworth 3 Stoneridge Road Rolling Meadows, IL 60008

To: SLSF Board of Directors  
From: Tracey Crawford  
Re: Village Bank and Trust R2018-2  
Date: January 16, 2018

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Motion:

A motion to approve the Village Bank and Trust Resolution dated January 16, 2018, as indicated below.

Village Bank and Trust R2018-2 approving two signature checks up to \$1,000 to be signed by Tracey Crawford, Director and/or Amy Charlesworth, Organizational Treasurer and Trisha Breitlow, Nanette Sowa or Brian Selders, Superintendents; and those checks over \$1,000 to be signed by Tracey Crawford, Director, and/or Amy Charlesworth, Organizational Treasurer and one of the following persons; the Chairman or Vice Chairman.

**Special Leisure Services Foundation**  
**Warrant #1**  
**January 16, 2018**

<b>Num</b>	<b>Name</b>	<b>Account</b>	<b>Amount</b>
25079	Cash/Nanette Sowa	10300 · VB&T Checking	-650.00
		10400 · Cash Banks	650.00
			<u>650.00</u>
25084	TPM Graphics, Inc.	10300 · VB&T Checking	-1,063.00
		42370 · Printing	1,063.00
			<u>1,063.00</u>
25085	Chevy Chase Country Club	10300 · VB&T Checking	-2,000.00
		12200 · Event Deposits	2,000.00
			<u>2,000.00</u>
25086	Laurel Katz	10300 · VB&T Checking	-56.94
		41375 · Lightning Athletes Booster Club	56.94
			<u>56.94</u>
25087	Rotary Club of Buffalo Grove	10300 · VB&T Checking	-188.00
		40400 · Professional Memberships	45.00
		40600 · Public Education/Information	143.00
			<u>188.00</u>
25088	TPM Graphics, Inc.	10300 · VB&T Checking	-285.00
		42370 · Printing	285.00
			<u>285.00</u>
<b>Total for Warrant #1</b>			<b><u>4,242.94</u></b>

Motion to approve Warrant #1 in the amount of \$ 4,242.94  
Covering check numbers 25079 and 25084 through 25088 from Village Bank & Trust

# **XI. Information/ Action Items**

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# **FY 2018**

# **Proposed Budget**

**Proposed SLSF 2018 Budget**

Account Number	Name of Account	FY 2017	PYE 2017	Proposed FY 2018	FY 2018 - Proposed FY 2017	% Change FY 2017 - Proposed FY 2018
<b>Income</b>						
31110	Interest Income	\$ 110.00	\$ 61.80	\$ -	\$ (110.00)	-100.00%
31200	Grants Received	\$ 75,500.00	\$ 271,195.16	\$ 80,350.00	\$ 4,850.00	6.42%
31300	Restricted Fundraising	\$ 55,910.00	\$ 58,220.50	\$ 58,434.00	\$ 2,524.00	4.51%
31400	Restricted Donations	\$ 3,900.00	\$ 19,000.00	\$ 1,950.00	\$ (1,950.00)	-50.00%
32300	Unrestricted Fundraising	\$ 245,260.00	\$ 256,855.60	\$ 249,995.50	\$ 4,735.50	1.93%
32400	Unrestricted Donations	\$ 50,000.00	\$ 32,195.51	\$ 50,000.00	\$ -	0.00%
	<b>Total</b>	<b>\$ 430,680.00</b>	<b>\$ 637,528.57</b>	<b>\$ 440,729.50</b>	<b>\$ 10,049.50</b>	<b>2.33%</b>
<b>Expense</b>						
40100	Postage	\$ 6,000.00	\$ 3,997.34	\$ 6,000.00	\$ -	0.00%
40200	Office Expense	\$ 3,000.00	\$ 2,248.95	\$ 2,500.00	\$ (500.00)	-16.67%
40250	Credit Card Fees	\$ 4,500.00	\$ 4,379.64	\$ 4,598.62	\$ 98.62	2.19%
40300	Newsletter Printing	\$ -	\$ -	\$ -	\$ -	#DIV/0!
40400	Professional Memberships	\$ 1,570.00	\$ 1,413.00	\$ 4,300.00	\$ 2,730.00	173.89%
40500	Education/Training	\$ 700.00	\$ 672.50	\$ 1,845.00	\$ 1,145.00	163.57%
40600	Public Education/Information	\$ 16,000.00	\$ 17,716.25	\$ 20,000.00	\$ 4,000.00	25.00%
40700	Printing	\$ 3,000.00	\$ 4,677.00	\$ 9,700.00	\$ 6,700.00	223.33%
40800	Professional Fees	\$ 14,225.00	\$ 13,767.47	\$ 7,775.00	\$ (6,450.00)	-45.34%
41300	Restricted Fundraising	\$ 12,880.00	\$ 10,632.54	\$ 13,799.00	\$ 919.00	7.14%
42300	Unrestricted Fundraising	\$ 93,275.00	\$ 93,820.91	\$ 92,432.00	\$ (843.00)	-0.90%
	<b>Administration</b>	<b>\$ 155,150.00</b>	<b>\$ 153,325.60</b>	<b>\$ 162,949.62</b>	<b>\$ 7,799.62</b>	<b>5.03%</b>
<b>Grants Given:</b>						
43100	NWSRA Lightning Athletes	\$ 30,000.00	\$ 30,000.00	\$ 25,000.00	\$ (5,000.00)	-16.67%
43200	Accessible Vehicle Support	\$ 48,000.00	\$ 48,000.00	\$ 70,000.00	\$ 22,000.00	45.83%
43300	Scholarships	\$ 70,000.00	\$ 70,000.00	\$ 81,000.00	\$ 11,000.00	15.71%
43400	Inclusion	\$ 39,000.00	\$ 39,000.00	\$ 14,000.00	\$ (25,000.00)	-64.10%
43500	General Program Support	\$ 88,000.00	\$ 88,000.00	\$ 144,000.00	\$ 56,000.00	63.64%
43700	RMCC Lease	\$ -	\$ -	\$ -	\$ -	0.00%
	<b>Total SLSF Grant to NWSRA</b>	<b>\$ 275,000.00</b>	<b>\$ 275,000.00</b>	<b>\$ 334,000.00</b>	<b>\$ 59,000.00</b>	<b>21.45%</b>
43650	Capital Improvements					
	ADA Improvements	\$ 275,000.00	\$ 275,000.00	\$ 262,000.00	\$ (13,000.00)	0.00%
	Roof Project	\$ -	\$ -	\$ -	\$ -	0.00%
	Kitchen Project	\$ -	\$ -	\$ -	\$ -	0.00%
	<b>Total Grants</b>	<b>\$ 550,000.00</b>	<b>\$ 550,000.00</b>	<b>\$ 596,000.00</b>	<b>\$ 46,000.00</b>	<b>8.36%</b>
	<b>Total Expenses</b>	<b>\$ 705,150.00</b>	<b>\$ 703,325.60</b>	<b>\$ 758,949.62</b>	<b>\$ 53,799.62</b>	<b>7.63%</b>
	<b>NET TOTAL</b>	<b>\$(274,470.00)</b>	<b>\$(65,797.03)</b>	<b>\$(318,220.12)</b>	<b>\$ 43,750.12</b>	<b>-15.94%</b>
33700	Investment Transfer	\$ 275,000.00	\$ 275,000.00	\$ 100,000.00	\$ (175,000.00)	-63.64%
31205	Grant Reserves	\$ -	\$ -	\$ 221,000.00	\$ 221,000.00	0.00%
	<b>BALANCE</b>	<b>\$ 530.00</b>	<b>\$209,202.97</b>	<b>\$ 2,779.88</b>	<b>\$ 2,249.88</b>	<b>424.51%</b>



AMERICAN PHILANTHROPIC  
STRENGTHENING CIVIL SOCIETY

# SPECIAL LEISURE SERVICES FOUNDATION

*2018 SLSF GOALS*

Prepared by American Philanthropic

*JANUARY 2018*

PHILADELPHIA | CHICAGO | PHOENIX

[WWW.AMERICANPHILANTHROPIC.COM](http://WWW.AMERICANPHILANTHROPIC.COM)

18 NORTH CHURCH STREET #2 | WEST CHESTER, PA 19380

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## GOALS

### GOAL 1: MAJOR GIFTS PROGRAM – MAIN FOCUS FOR NS AND TC IN 2018

*Build a major gifts program by devoting more time to personal cultivation of potential major donors, creating a robust moves management system, and updating donor messaging to be more personal and donor-centric, rather than transactional and organization-centric.*

**Status:** SLSF currently lacks staff time to cultivate individual donors. An effective major gifts program will require time to both research and meet with potential major donors. However, SLSF has a sizeable pool of current donors, event attendees, participant families, etc. to start its search for major gifts.

**Strategy Notes:** In this search for major donors, SLSF should focus specifically on moving current donors, sponsors, and participant families to the \$1,000+ gift size range. This effort will be aided by the creation of a moves management system to help SLSF staff track and remember previous interactions with, current goals for, and future meetings with major donors and prospects. SLSF will also be increasingly bold in making explicit asks, and shifting to a donor-centric, personal, and mission-focused pitch over an organization-centric, transactional, and need-focused pitch.

#### **Key Tasks:**

- Establish a pipeline of research on both new and prospective major donors to prepare for donor meetings.
  - Invest in a wealth research tool such as Wealth Engine or iWave (or invest in an outside contractor to conduct donor research and wealth screenings). – **American Philanthropic**
    - Research potential wealth screening and research tools (including an outside contractor).
    - Create a shortlist of options, weighing the benefits of each system.
    - Decide on a system and invest.
  - Begin to build a database designed to store intel on the donors with whom SLSF will seek to carry out donor meetings.
    - Assess the ability of SLSF’s current database system to successfully store a variety of donor-related information, including background information, giving history, net worth, contact info, and call and meeting notes.
    - Decide whether SLSF needs to invest in a new database system.
    - Research potential database options such as Salesforce or DonorPerfect (if applicable).
    - Begin using new database and train all SLSF on using it adequately (if applicable).
  - Carry out research on current and prospective donors that SLSF is aware of.
    - Take SLSF’s current database of donors, families, and event attendees and conduct a wealth screening to determine net worth and five year giving capacity.
    - Perform due diligence research of publicly available information on those donors

- with the highest giving to SLSF, most frequent giving, greatest longevity of giving and (especially in the case of prospects) highest net worth and highest frequency of event attendance.
  - Every three months, or as needed, review and research new entries into SLSF’s database to assess whether they would be good donor prospects.
- In addition to researching event attendees and others within SLSF’s sphere of activities, spend time seeking new major donor prospects who would be attracted to supporting SLSF because of its mission.
  - Task outside contractor or staff member with regularly providing prospect profiles.
  - Research other local nonprofit organizations or organizations with similar or comparable missions.
  - Review their annual reports for their top donors, research those donors, and determine which may be good prospects for SLSF.
- Build out an infrastructure for a successful major donor meeting program.
  - Build a moves-management system that can track past interactions, goals, and next steps with each prospect or donor.
    - Either within SLSF’s database or on a separate excel sheet, lay out those donors who SLSF will prioritize for meetings.
    - Create tabs for basic information, next and last moves, goals, and notes.
- Secure meetings with current and prospective major donors.
  - Draft template meeting request letters, emails, and phone call scripts for current and prospective donors.
  - Prioritize current donors and donor prospects for meeting outreach.
    - Create a system of prioritization based on donor longevity, frequency of giving, gift size, and net worth.
    - Establish conditions for varying levels of priority.
    - Rank donors and donor prospects into three priority categories for meetings (high priority—meeting necessary, medium priority—meeting if time permits, and low priority—cultivate through other means).
  - Reach out systematically to highest priority donors and prospects.
    - Call or e-mail top priority donors, requesting the opportunity to meet with them.
    - Bring collateral materials to share with donors.
    - Use some meetings to make an ask, some to build relationships. An ideal ratio is two meetings (or phone calls) without an ask for every meeting or call with an ask.
    - Thank donors with a hand-written thank you note sent the day after the meeting.

## GOAL 2: FOUNDATIONS PROGRAM – MAIN FOCUS OF CATHY AND INTERN

*Build up a systematic, strategic foundation solicitation program that includes regular prospect research, a steady pipeline of new foundation prospects, general operations and specialized proposal and letter templates, and moves management and deadline tracking systems.*

**Status:** SLSF currently only has about 16 hours a week to devote to foundation solicitation. It has done well with the time it has, but devoting a full 40 hours a week (or close to it) is key to expanding its base of foundation support. SLSF has been supported predominantly by a handful of foundations, many of which renew their giving on a yearly basis. According to American Philanthropic’s research, there are approximately 195 grantmaking foundations in the municipal areas served by NWSRA, and many more in the Chicago metro area that would be worth pursuing.

**Strategy Notes:** In addition to renewing (and possibly upgrading) current foundation supporters, SLSF will devote time to researching, soliciting, and acquiring new foundation supporters. SLSF will build up a database of local foundations that are good matches and begin to systematically initiate relationships with them. These efforts will be aided by the updating of proposal and letter templates as needed, and the creation of a moves management and deadline tracking system to keep track of past interactions with, current goals for, and future meetings with foundations.

### **Key Tasks:**

- Review current foundation program:
  - Look over current foundation solicitation materials and revise as necessary to reflect a donor-centric, mission-oriented, and personal request.
    - Prepare updated templates of general operations letter of inquiry and grant proposal.
    - Prepare at least three updated templates of specialized program letters of inquiry and grant proposals, as they become necessary to suit foundation requirements.
  - Assess current foundation relationships.
    - Review each current foundation relationship and assess likelihood of a. renewal of current grant level and b. upgrade of gift size.
- Create moves-management system for foundation program.
  - Create a dashboard or Excel sheet of current and prospective foundation supporters, complete with basic information, application due dates, date of last meeting, date of next meeting, latest communication, goals, and notes.
    - Review and update this tracking sheet at least monthly.
- Build up a pipeline of potential foundation grantees.
  - Consistently complete foundation prospect research.
    - Task staff member or outside contractor with foundation prospect research.
    - Invest in a subscription to Foundation Directory and train staff member on use, if research is to be completed in house.

- Using a foundation database or search engine, identify foundations based in the districts where SLSF operates.
- Research whether these foundations would be a good match for SLSF by visiting their websites or looking at their 990s (the latter are available through Foundation Directory or a free subscription to Guidestar).
- Identify wider Chicago-area prospects that may have an affinity for SLSF’s mission.
- Research whether these would be a good match for SLSF by visiting their websites or looking at their 990s.
- Add all new foundation prospects to tracking sheet.
- Formulate a “next move” with each (usually meeting request letter or call, since relationships are key with foundations), as well as a gift goal (based on their average gift size on their 990), adding this information to the tracking sheet.
- Maintain good relationships with existing foundation funders.
  - Incorporate current funders into tracking sheet, including their key dates and deadlines.
  - Add key dates (such as inquiry, application, and reporting deadlines) for 2018-2020 to development calendar.
  - Include current foundation funders on non-solicitation mailings and event invitations.
  - Attempt to meet with foundation contact annually or more, as SLSF has been doing.
    - Review contact history with each current funder to determine if and when last meetings have taken place. Prioritize those that have never been met with or not met with recently and set engagement strategy.
    - Review and re-strategize approach with current contacts, as necessary.
    - Begin executing foundation meeting strategies as outlined in tracking sheet.
  - Develop and execute re-approach strategies for all lapsed funders.
    - Incorporate lapsed funders and other past prospects into tracking sheet.
    - Develop re-approach strategies with target dates.
- Begin approaching new foundations.
  - Establish contact.
    - Starting with the foundations researched and added to the tracking sheet, utilize meeting request letters and phone calls to establish contact with foundation prospects.
    - Request meetings with foundations and at meetings request permission to submit a proposal; consider inviting foundation representatives to events and recognizing them in that context.
    - Research board members and trustees of foundations (information available on 990) and determine whether SLSF has existing connections.
    - Leverage board and trustee connections, sometimes “approaching” the foundation through a board member to increase chances of support and receive insider advice on how to apply, how much to request, etc.
    - Be persistent in attempting to establish contact, as foundations can often be busy or hard to reach—persistence pays off. Frequently, it will take an initial letter and

- three or more phone calls or emails to establish contact and receive a satisfactory response.
- Consider sending invitations to events to local foundation addresses as appropriate.
- Consistently send letters of inquiry, or proposals as appropriate, when an initial meeting or phone call is not possible, or after a successful meeting.
  - Follow up a week after sending letter of inquiry or proposal to ensure that the foundation has received SLSF's materials.
  - Continue to follow up consistently until contact can be established.
  - In the case of a successful meeting, promptly submit a proposal or application.
  - In the case of rejection, thank the foundation and let them know that you will be including them on your newsletter so that they can stay abreast of developments.
  - Try again with rejections after 6-12 months.
  - From the beginning of the process, be sure to follow all foundation directives about how and when to apply, which may be found online or on the foundation's tax filings.

## GOAL 3: DIRECT MAIL

*Restructure current direct mail (annual appeal) program, bringing it in line with industry standards, and experimenting with strategic prospect mailing to acquire new donors.*

**Status:** Presently, SLSF sends out a spring and end of year appeal. These letters do very well from the point of view of response rates and return on cost. However, many organizations go into the mail more frequently, sending at least quarterly appeals. SLSF sends out many non-solicitation letters already, meaning that it is in a good position to even out the ratio of ask to non-ask correspondence. Moreover, SLSF's appeals lack some of the standard practices that contribute to a strong appeal, including an explicit ask, a personalized address, and a longer message. SLSF also does not currently undertake prospect mailing to acquire new donors and grow its file.

**Strategy Notes:** There will be three priorities for SLSF as it seeks to restructure its direct mail program: 1. Mail an explicit ask quarterly; 2. Experiment with different approaches in appeals (i.e., test longer letters vs. postcards); 3. Carry out some prospect mailing to see if it can become a reliable source of new donors over time. This will require a significant investment in time on task for writing and designing letters and coordinating with printers for delivery. It will also require additional investments in printing and postage costs.

### **Key Tasks:**

- Establish a quarterly housefile mailing program.
  - Reform current appeal program.
    - Begin writing longer (2-4 page) solicitation letters, testing the longer letter against the shorter postcard by constituency (i.e., parents, supporters, etc.).
    - Always make an explicit ask in your letters.
    - Try to reduce the ratio of non-solicitation mailings to roughly 1 solicitation to 1-2 non-solicitations.
    - Simplify SLSF's solicitation package, using a plain envelope with address information printed on the front.
    - Continuously check messaging in mail appeals to ensure that it is personal, mission-oriented, and donor-centric.
  - Establish a mailing schedule:
    - January 20, 2018: Begin preparing spring appeal.
    - March 15, 2018: Put spring appeal in the mail.
    - April 20, 2018: Begin preparing summer appeal.
    - June 1, 2018: Put summer appeal in the mail.
    - July 20, 2018: Begin preparing fall appeal.
    - September 15, 2018: Put fall appeal in the mail.
    - September 20, 2018: Begin preparing end of year appeal.
    - October 1: Begin preparing brief non-solicitation update letter.
    - October 20: Send brief non-solicitation update letter to housefile.

- November 20: Put end of year appeal in the mail.
- December 20: Consider sending a reminder postcard for the end of year appeal that will land right before Dec. 31.
- Repeat mailing schedule yearly, adjusting as necessary.
- Accompany each appeal with an e-campaign (end of year e-campaign should be the largest).
  - Spring through fall campaigns should be 3-5 e-mails, the first introducing a campaign goal (a concrete amount, i.e., \$5,000) with a “soft ask,” the second to last making a hard ask, and the last letting everyone know that the campaign is over and that you met X% of the goal (while still offering a donate button so that people can give after the campaign).
  - The end of year appeal should be similar, building up to an ask over 10 days with 5 to 7 e-mails and an explicit goal.
  - Carry out a Giving Tuesday campaign or a “last minute” campaign, offering donors the opportunity to donate one last time for a charitable donation within the fiscal year. Set a campaign goal along with 4-6 emails.
- Follow up:
  - Thank all donors who give through the appeals, following a set system for which level of donors are recognized in what ways.
  - Research all donors who give through appeal letters and select the highest ranking (highest net worth, longest giving history, largest gift, and greatest frequency of giving) among them for meeting requests.
- Experiment with prospect mailings.
  - Discuss potential approaches to prospect mailing including:
    - Renting or exchanging lists with like-minded or local organizations.
    - Renting ZIP code or geographic area lists from the post office based on high-net worth areas of NWSRA’s service region.
  - Prepare prospect mailings.
    - Test a 6-8 page letter introducing potential donors to SLSF.
    - Create a one-page reply form, business reply envelope (with the post office), invest in nonprofit postage (with post office, if not done already), and consider possible inserts for the letter (i.e., an SLSF magnet).
    - Test the results from a 9x12 envelope versus a half sheet 6x9 envelope. Postage costs will be greater for the 9x12, but we often see better results from the larger package.
    - Coordinate with list brokers to acquire mailing lists.
    - Find a printer to handle production, stamping, and sending of letters.
    - Create a tracking sheet that records the effectiveness of each mailing, broken down by lists used or package specs tested.
  - Establish a direct mail prospecting schedule, dropping approximately twice per year and scaling up to three or four drops per year if initial results are promising in year one and year two.

- January 5, 2018: Begin preparing first prospecting piece.
  - February 20, 2018: Drop first prospecting piece.
  - August 1, 2018: Begin preparing second prospecting piece.
  - October 1, 2018: Drop first prospecting piece.
- Create and organized system of mailing evaluation and record keeping
  - Continue to track results of each appeal letter, including results of split tests (i.e., longer letter v. postcard).
  - Track results of prospecting attempts, seeing which methods of direct mail prospecting yield the best results.
  - Make sure that the database is equipped to track individual donor giving over time.

## GOAL 4: PLANNED GIVING

*Establish a basic planned giving program that alerts parents, grandparents, volunteers, and donors to the possibility of including SLSF in their legacy plans, while recognizing those that have already done so.*

**Status:** Currently, SLSF has no planned giving program in place. However, given the nature of its work, it has potential to make huge returns over time by publicizing its ability to receive planned gifts. Because so many parents and grandparents are involved in the life of the organization, making an appeal to family that they can make SLSF part of their legacy could be a relatively high-yield fundraising strategy with relatively little investment in time and money (though patience will be required!).

**Strategy Notes:** Implementing a basic planned giving program is not time-consuming or complex if done correctly and consistently over time. All it requires is letting people know that SLSF accepts planned gifts, and offering them the opportunity to make SLSF part of their legacy. To make this pitch successful, SLSF will want to focus on what sort of legacy people want to leave when they pass away. SLSF's programs, which directly contribute to the happiness and thriving of disabled friends and family members, are a very worthy candidate for a planned gift. A successful planned giving program for SLSF will not require many hard "sells," but rather lots of time building relationships with potential donors. Planned gifts will flow naturally out of other strategies that establish these relationships, particularly meetings with major donors.

### **Key Tasks:**

- Create planned giving society.
  - Come up with a name, stock language, and benefits for SLSF's planned giving society members.
    - Review other examples of planned giving programs for nonprofits.
    - Brainstorm a name for the planned giving society, possibly invoking the founder of NWSRA/SLSF.
    - Write a short description of the society that lets donors know how their giving can become part of a great legacy of support for a worthy cause.
    - Think of reasonable and feasible ways to recognize members of the planned giving society.
    - If possible, find an existing planned gift or acquire one from a dedicated supporter or board member who is willing to step up and provide a testimonial about why they made SLSF a part of their legacy plans.
  - Familiarize SLSF development staff with some of the basics of accepting and handling planned gifts especially those staff members who will be meeting with major donors.
    - Research types of planned gifts and think about what would be required to accept them.
    - Implement necessary structures for receiving planned gifts, such as opening a brokerage account for SLSF and having a lawyer or financial advisor to call in a

situation where SLSF would need more detailed advice on a particular situation.

- Create planned giving collateral material.
  - Create a simple planned giving brochure that lets donors know about the possibility of making a planned gift.
    - Design brochure, integrating images, language on the giving society, and some brief notes on how to make an estate gift to SLSF.
    - Find a professional printer who can produce a supply of high-quality brochures.
  - Integrate planned giving options on all relevant donor materials (for example, include an “I would like to learn more about planned giving to SLSF” and an “I have already made plans to include SLSF in my estate” checkbox on annual appeal reply form).
- Spread the word.
  - Have brochures on hand to share at donor meetings, when appropriate.
  - Launch a planned giving page on the SLSF website.
  - Include the planned giving brochure among collateral materials at SLSF events.
  - Once a year, conduct a planned giving mail campaign, sending a cover letter and planned giving brochure to key audiences.



*We exist to support and promote outstanding opportunities through recreation for children and adults with disabilities in cooperation with Northwest Special Recreation Association.*

**Special Leisure Service Foundation  
Board Meeting Schedule - Calendar Year 2018**

**Special Leisure Services Foundation**

- January 16, 2018     Annual Meeting (Third or Fourth Tuesday due to the IPRA Conference)
- May 15, 2018        (Third Tuesday)
- October 16, 2018    (Third Tuesday)
- December 12, 2018   Holiday Luncheon (Second Wednesday)

**NOTE: All meetings will begin at 3:30 p.m.**, at Park Central, 3000 Central Road, Rolling Meadows, unless otherwise indicated.

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Anyone who plans to attend a meeting, and who requires a special accommodation due to a disability, should contact NWSRA 48 hours in advance of the meeting.



## SLSF CALENDAR OF EVENTS 2018

DATE	EVENT
Sun, Feb. 25	Gold Medal Fashion Show
Wed, May 16	Buffalo Grove Golf Classic
Thu, Jun. 7	Palatine Hills Golf Classic
Wed, Aug. 15	Moretti's/NWSRA Golf Classic In Memory of Kevin T. Kendrigan
Thu, Aug. 30	Women's Golf Outing
Thu, Sept. 13	Arlington Classic Golf Outing
TBD	Terrazo & Marble Supply Companies Golf Outing
Fri, Nov. 2	Celebrate Ability Gala



### What is SLSF?

Special Leisure Services Foundation (SLSF), a 501 (c) (3) non-profit foundation, is the fundraising arm of Northwest Special Recreation Association.

### Mission Statement

We exist to support and promote outstanding opportunities through recreation for children and adults with disabilities in corporation with Northwest Special Recreation Association.

### Foundation Dollars Provide:

- Transportation
- Programs
- Inclusion
- Scholarships
- Athletics

### Get Involved!

To learn more about donating, sponsoring or volunteering, please visit [www.slsf.me](http://www.slsf.me) or contact Nanette Sowa at [nsowa@slsf.me](mailto:nsowa@slsf.me) or (847)392-2848.



# **Conflict of Interest Policy And Annual Statement**

**For Directors, Officers and  
Members of a Committee with  
Board Delegated Powers**

## **Article I – Purpose**

1. The purpose of this Board conflict of interest policy is to protect SLSF’s interests when it is contemplating entering into a transaction or arrangement that might benefit the private interests of an officer or director of SLSF or might result in a possible excess benefit transaction.
2. This policy is intended to supplement, but not replace, any applicable state and federal laws governing conflicts of interest applicable to nonprofit and charitable organizations.
3. This policy is also intended to identify “independent” directors.

## **Article II – Definitions**

1. Interested person -- Any director, officer, or member of a committee with governing board delegated powers, who has a direct or indirect financial interest, as defined below, is an interested person.
2. Financial interest -- A person has a financial interest if the person has, directly or indirectly, through business, investment, or family:
  - a. An ownership or investment interest in any entity with which SLSF has a transaction or arrangement,
  - b. A compensation arrangement with SLSF or with any entity or individual with which SLSF has a transaction or arrangement, or
  - c. A potential ownership or investment interest in, or compensation arrangement with, any entity or individual with which SLSF is negotiating a transaction or arrangement.

Compensation includes direct and indirect remuneration as well as gifts or favors that are not insubstantial.

A financial interest is not necessarily a conflict of interest. A person who has a financial interest may have a conflict of interest only if the Board or Executive Committee decides that a conflict of interest exists, in accordance with this policy.

3. Independent Director -- A director shall be considered “independent” for the purposes of this policy if he or she is “independent” as defined in the instructions for the IRS 990 form or, until such definition is available, the director –

- a. is not, and has not been for a period of at least three years, an employee of Northwest Special Recreation Association (NWSRA) or any entity in which SLSF has a financial interest;
- b. does not directly or indirectly have a significant business relationship with SLSF, which might affect independence in decision-making;
- c. is not employed as an executive of another corporation where any of SLSF's executive officers or employees serve on that corporation's compensation committee; and
- d. does not have an immediate family member who is an executive officer or employee of SLSF or NWSRA, or who holds a position that has a significant financial relationship with SLSF.

### Article III – Procedures

1. Duty to Disclose -- In connection with any actual or possible conflict of interest, an interested person must disclose the existence of the financial interest and be given the opportunity to disclose all material facts to the Board or Executive Committee.
2. Recusal of Self – Any director may recuse himself or herself at any time from involvement in any decision or discussion in which the director believes he or she has or may have a conflict of interest, without going through the process for determining whether a conflict of interest exists.
3. Determining Whether a Conflict of Interest Exists -- After disclosure of the financial interest and all material facts, and after any discussion with the interested person, he/she shall leave the Board or Executive Committee meeting while the determination of a conflict of interest is discussed and voted upon. The remaining Board or Executive Committee members shall decide if a conflict of interest exists.
4. Procedures for Addressing the Conflict of Interest
  - a. An interested person may make a presentation at the Board or Executive Committee meeting, but after the presentation, he/she shall leave the meeting during the discussion of, and the vote on, the transaction or arrangement involving the possible conflict of interest.
  - b. The Chairperson of the Board or Executive Committee shall, if appropriate, appoint a disinterested person or committee to investigate alternatives to the proposed transaction or arrangement.
  - c. After exercising due diligence, the Board or Executive Committee shall determine whether SLSF can obtain with reasonable efforts a more advantageous transaction

or arrangement from a person or entity that would not give rise to a conflict of interest.

- d. If a more advantageous transaction or arrangement is not reasonably possible under circumstances not producing a conflict of interest, the Board or Executive Committee shall determine by a majority vote of the disinterested directors whether the transaction or arrangement is in SLSF's best interest, for its own benefit, and whether it is fair and reasonable. In conformity with the above determination, it shall make its decision as to whether to enter into the transaction or arrangement.

#### 5. Violations of the Conflicts of Interest Policy

- a. If the Board or Executive Committee has reasonable cause to believe a member has failed to disclose actual or possible conflicts of interest, it shall inform the member of the basis for such belief and afford the member an opportunity to explain the alleged failure to disclose.
- b. If, after hearing the member's response and after making further investigation as warranted by the circumstances, the Board or Executive Committee determines the member has failed to disclose an actual or possible conflict of interest, it shall take appropriate disciplinary and corrective action.

### **Article IV – Records of Proceedings**

The minutes of the Board and all committees with board delegated powers shall contain:

- a. The names of the persons who disclosed or otherwise were found to have a financial interest in connection with an actual or possible conflict of interest, the nature of the financial interest, any action taken to determine whether a conflict of interest was present, and the Board's or Executive Committee's decision as to whether a conflict of interest in fact existed.
- b. The names of the persons who were present for discussions and votes relating to the transaction or arrangement, the content of the discussion, including any alternatives to the proposed transaction or arrangement, and a record of any votes taken in connection with the proceedings.

### **Article V – Compensation**

1. A voting member of the Board who receives compensation, directly or indirectly, from SLSF for services is precluded from voting on matters pertaining to that member's compensation.

2. A voting member of any committee whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from SLSF for services is precluded from voting on matters pertaining to that member's compensation.
3. No voting member of the Board or any committee whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from SLSF, either individually or collectively, is prohibited from providing information to any committee regarding compensation.

#### **Article VI – Annual Statements**

1. Each director, principal officer and member of a committee with Board delegated powers shall annually sign a statement which affirms such person:
  - a. Has received a copy of the conflict of interest policy,
  - b. Has read and understands the policy,
  - c. Has agreed to comply with the policy, and
  - d. Understands SLSF is charitable and in order to maintain its federal tax exemption it must engage primarily in activities which accomplish one or more of its tax-exempt purposes.
2. Each voting member of the Board shall annually sign a statement which declares whether such person is an independent director.
3. If at any time during the year, the information in the annual statement changes materially, the director shall disclose such changes and revise the annual disclosure form.
4. The Executive Committee shall regularly and consistently monitor and enforce compliance with this policy by reviewing annual statements and taking such other actions as are necessary for effective oversight.

#### **Article VII – Periodic Reviews**

To ensure SLSF operates in a manner consistent with charitable purposes and does not engage in activities that could jeopardize its tax-exempt status, periodic reviews shall be conducted. The periodic reviews shall, at a minimum, include the following subjects:

- a. Whether compensation arrangements and benefits are reasonable, based on competent survey information (if reasonably available), and the result of arm's length bargaining.

- b. Whether partnerships, joint ventures, and arrangements with management organizations, if any, conform to SLSF's written policies, are properly recorded, reflect reasonable investment or payments for goods and services, further charitable purposes and do not result in inurement or impermissible private benefit or in an excess benefit transaction.

### **Article VIII – Use of Outside Experts**

When conducting the periodic reviews as provided for in Article VII, SLSF may, but need not, use outside advisors. If outside experts are used, their use shall not relieve the Board of its responsibility for ensuring periodic reviews are conducted.

Director and Officer  
Annual Conflict of Interest Statement

1. Name: \_\_\_\_\_ Date: \_\_\_\_\_

2. Position:

Are you a voting Director? Yes No

Are you an Officer? Yes No

If you are an Officer, which Officer position do you hold:

\_\_\_\_\_.

3. I affirm the following:

I have received a copy of the SLSF Conflict of Interest Policy. \_\_\_\_\_ (initial)

I have read and understand the policy. \_\_\_\_\_ (initial)

I agree to comply with the policy. \_\_\_\_\_ (initial)

I understand that SLSF is charitable and in order to maintain its federal tax exemption it must engage primarily in activities which accomplish one or more of tax-exempt purposes. \_\_\_\_\_ (initial)

4. Disclosures:

a. Do you have a financial interest (current or potential), including a compensation arrangement, as defined in the Conflict of Interest policy with SLSF? Yes No

i. If yes, please describe it: \_\_\_\_\_

ii. If yes, has the financial interest been disclosed, as provided in the Conflict of Interest policy? Yes No

b. In the past, have you had a financial interest, including a compensation arrangement, as defined in the Conflict of Interest policy with SLSF? Yes No

i. If yes, please describe it, including when (approximately):  
\_\_\_\_\_

ii. If yes, has the financial interest been disclosed, as provided in the Conflict of Interest policy? Yes No

5. Are you an independent director, as defined in the Conflict of Interest policy? Yes No

a. If you are not independent, why? \_\_\_\_\_

Signature of Director \_\_\_\_\_ Date: \_\_\_\_\_

Date of Review by Executive Committee: \_\_\_\_\_

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## Fundraisers

*Events that raise money for some type of charity, including galas, golf outings, shopping events, charity auctions, etc. Deadline is two weeks before event date.*

**Special Leisure Services Foundation Celebrate Ability Gala:** 6 p.m. Friday, Nov. 3, Chevy Chase Country Club, 1000 N. Milwaukee Ave., Wheeling. Special Leisure Services Foundation will host its annual Celebrate Ability Gala to support Northwest Special Recreation Association's recreational programs for children and adults with disabilities. \$100. For tickets, visit [e.gesture.com/events/51P](http://e.gesture.com/events/51P).

**Fall Back Brew Fest:** Noon to 5 p.m. Saturday, Nov. 4, Palatine Aquatic Center Parking Lot, 40 E. Palatine Road, Palatine. Sample nearly 150 beers from more than 50 breweries. Hosted by the Palatine Jaycees. VIP \$40; general admission \$30; designated driver \$10. tickets. [beerfests.com](http://beerfests.com).

**Elk Grove Rotary Club Trivia**

**Night:** 6:30-10:30 p.m. Saturday, Nov. 4, Living Hope Church, Elk Grove Village. Elk Grove Rotary Club presents its first Trivia Night to benefit the club's scholarship program. Sign up as a team of eight for \$160 or individually and get placed on a team for \$25. There will be 10 rounds of trivia with a cash prize for best score and another prize for the best table theme. There will also be a split the pot raffle and games between rounds for prizes. For details, email [jpeterman@lossmaneyecare.com](mailto:jpeterman@lossmaneyecare.com) or sign up at [egrotarytrivianight.eventbrite.com](http://egrotarytrivianight.eventbrite.com).

**St. Martin's Paisley Bag Bingo:** Noon Saturday, Nov. 4, St. Martin's Episcopal Church, 1095 Thacker St., Des Plaines. Second annual "Paisley Bag Bingo," a day of games and prizes to benefit the church. Doors open at noon, games begin 1 p.m. Attendees will enjoy 12 bingo games, each with an authentic Vera Bradley bag as the prize. A silent auction will also be avail-

able, including items such as restaurant gift cards, museum passes and gift baskets. With only 75 tickets available, they are sure to go fast. Tickets are \$20 and are available via PayPal at [www.saintmartinschurchdp.org](http://www.saintmartinschurchdp.org) or by calling (847) 824-2043.

**'Midnight at Moulin Rouge' Gala:** 6 p.m. Saturday, Nov. 4, Gene & Georgetti, Rosemont. Park Ridge Civic Orchestra will host its annual fundraising gala, "Midnight at Moulin Rouge." Join for an evening of drinks, dining and dancing; raffle and silent auction prizes, including sports memorabilia; and entertainment by Lynnette School of Dance and the Jacobi Family Jazz Quartet with Abigail Riccards. Proceeds support the orchestra's mission of making the professional concert experience affordable and convenient to people of all ages. Tickets are \$125 per person. For information and to purchase tickets, visit [www.parkridgecivicorchestra.org](http://www.parkridgecivicorchestra.org) or call (847) 692-7726.

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### SGA YOUTH & FAMILY SERVICES

11 E. Adams, Suite 1500, Chicago 60603  
312-663-0305 • www.sga-youth.org

Key Contact: Audrey Schroder, marketing and communications manager (aschroder@sga-youth.org)

Year Founded: 1911

Paid Employees: 271

SGA helps children, families and communities facing great challenges to realize their potential. By providing free, comprehensive services, SGA helps children, families and communities break the cycle of adversity and embrace a cycle of opportunity.

SGA provides a continuum of social services, from cradle to career, in some of Chicago's most challenged and consistently under-served communities. The result? Long-term, community-wide change.

Services Offered: early childhood education/development, education support, workforce development, parenting education/counseling

Social Media: facebook.com/sgayouth • twitter.com/SGA\_Youth • instagram.com/sga\_youth/ • linkedin.com/company/1896068/

### SLSF

3000 W. Central Rd., Suite 205, Rolling Meadows 60008  
847-392-2848 • www.slsf.me

Key Contact: Nanette Sowa, superintendent of development (nsowa@slsf.me)

Highest Ranking Paid Executive: Tracey Crawford, president (tcrawford@slsf.me)

Nanette Sowa, Superintendent of Development (nsowa@nwsra.org)

Year Founded: 1981

Paid Employees: 0

To support and promote outstanding opportunities through recreation for children and adults with disabilities in cooperation with Northwest Special Recreation Association.

Services Offered: fundraising events, sponsorships, grants, donations, volunteerism

Social Media: facebook.com/slsf.me

### SOUTHLAND HEALTH CARE FORUM

30 E. 15th St., Suite 405, Chicago Heights 60411  
708-756-1000, ext. 53442 • www.southlandhealthcareforum.org

Key Contact: Karen J. Biesboer, resource coordinator (karen.biesboer@southlandhealthcareforum.org)

Highest Ranking Paid Executive: Jennifer Artis, CEO (jennifer.artis@southlandhealthcareforum.org)

Year Founded: 2003

Paid Employees: 5

Southland Health Care Forum provides training to the unemployed or those from low-income households in a variety of medical careers including LPN/RN/CNA/CMA. It also offers computer training.

changing lives through hope and trust

Services Offered: Workforce development: Offers medical careers and computer training skills. Provides resume assistance and job search training.

Social Media: Facebook • twitter.com/SouthlandHealth

### ST. COLETTA'S OF ILLINOIS INC.

18350 Crossing Drive, Tinley Park 60487

708-342-5200 • www.stcil.org

Key Contact: Annette Skafgaard, executive director (askafgaard@stcil.org)

Highest Ranking Paid Executive: Annette Skafgaard, executive director

To provide support and services to more than 400 children and adults with developmental disabilities — each individual is given the opportunity to grow in the least restrictive setting that meets his/her needs or abilities.

Services Offered: residential, educational and vocational services for children and adults with developmental disabilities and autism

Social Media: facebook.com/stcolettasofil/ • twitter.com/StColettasIL

### ST. PATRICK'S RESIDENCE NURSING AND REHABILITATION

1400 Brookdale Road, Naperville 60563

630-416-6565 • www.stpatrickresidence.org

Key Contact: Cathy Carr, marketing & development director (ccarr@stpatrickresidence.org)

Highest Ranking Paid Executive: Marilyn Daley, administrator

Year Founded: 1964

Paid Employees: 240

A nonprofit, long-term care and short-term rehabilitation facility served by the Carmelite Sisters for the Aged and Infirm caring for older adults with love, respect and dignity.

Services Offered: long-term care, short-term rehab, physical, occupational and speech therapies, on-site clinic, activity calendar, beauty/barbershop, coffee shop, first floor and rooftop gardens.

Social Media: www.stpatrickresidence.org

### THE LITERACY CONNECTION

270 N. Grove Ave., Elgin 60120

847-742-6565 • www.elginliteracy.org

Key Contact: Karen L. Oswald, executive director (koswald@elginliteracy.org)

Highest Ranking Paid Executive: Karen L. Oswald, executive director (koswald@elginliteracy.org)

Year Founded: 1984

Paid Employees: 6

2017 Projected Income: \$242,463

2017 Projected Expenses: \$242,463

To help adults in the northwest suburbs reach their literacy goals through one-on-one volunteer tutoring and small group instruction.

The Literacy Connection envisions a community in which adults have access to learning and volunteer opportunities that will enable them to reach their potential and fully participate in their communities.

Services Offered: Helping adults acquire fundamental literacy skills and learn to read, write, speak and understand English.

Social Media: facebook.com/literacyconnection • LinkedIn

### THEOSOPHICAL SOCIETY IN AMERICA

1926 N. Main St., Wheaton 60187

630-668-1571 • www.theosophical.org

Key Contact: Christopher Dixon, chief of staff (cdixon@theosophical.org)

Highest Ranking Paid Executive: Barbara Hebert, president (admin@theosophical.org)

Year Founded: 1875

Paid Employees: 45

To encourage open-minded inquiry into world religions, philosophy, science, and the arts in order to understand the wisdom of the ages, respect the unity of all life, and help people explore spiritual self-transformation.

Services Offered: Public programs on a wide range of spiritual topics from yoga to comparative religion; Quest Book Shop, a metaphysical gift store; Quest Books, a mind-body-spirit press; a world-renowned library; and

847-741-2259 • www.uwelgin.org

Key Contact: Lynne A. Bosley, president (lbosley@uwelgin.org)

Year Founded: 1924

Paid Employees: 2

building community, improving lives, making every contribution count.

Social Media: facebook.com/unitedwayelgin/

### UNITED WAY OF METRO CHICAGO

333 S. Wabash Ave., 30th floor, Chicago 60604

312-906-2350 • www.liveunitedchicago.org

Key Contact: Wendy DuBoe, president and chief Executive officer (Wendy.DuBoe@uw-mc.org)

Highest Ranking Paid Executive: Wendy DuBoe, president and chief Executive officer

(Wendy.DuBoe@uw-mc.org)

Year Founded: 1932

United Way advances the common good, creating opportunities for a better life by focusing on the three key building blocks for strong families and healthy communities: Education, Income and Health.

Social Media: www.facebook.com/unitedwaychicago • twitter.com/unitedwaychi/

### WAYNE/WINFIELD AREA YOUTH AND FAMILY SERVICES (WAYS)

27W031 North Ave., West Chicago 60185

630-231-7166 • www.ways4change.org

Key Contact: Patricia Gherardini, executive director (wayspatricia@gmail.com)

Highest Ranking Paid Executive: Patricia Gherardini, executive director (wayspatricia@gmail.com)

Year Founded: 1983

Paid Employees: 7

2017 Projected Income: \$324,250

2017 Projected Expenses: \$324,250

Developing societal supports — counseling and youth programming — that enable youth, adults and families to grow and maintain healthy and responsible roles in community life

Services Offered: In English and Spanish: individual and family therapy; anger management and parenting classes; senior services; tutoring; youth prevention programming; summer day camp; and Community Continuing Education seminars

### WAYSIDE CROSS MINISTRIES

215 E. New York St., Aurora 60505

630-892-4239 • www.waysidecross.org

Key Contact: Birnie Harper, annual campaign coordinator (bharper@waysidecross.org)

Highest Ranking Paid Executive: James Lukose, executive director

Year Founded: 1928

Paid Employees: 40

To honor God by loving and serving the afflicted and powerless through sharing the Gospel of forgiveness and hope in Jesus Christ by empowering them to be disciples of Christ.

To be a Christ-centered ministry pursuing excellence through transformed lives for God's glory.

Social Media: Facebook

### WELLNESS HOUSE

131 N. County Line Road, Hinsdale 60521

630-323-5150 • www.wellnesshouse.org

Key Contact: Jeannie Cella, executive director

Highest Ranking Paid Executive: Jeannie Cella, executive director

Year Founded: 1990

# Northwest suburbs in 60 seconds

## Nominate a Shining Star:

Mount Prospect's Special Events Commission is seeking nominations of individuals and organizations that have had a positive impact on the community for its Shining Star awards. The categories cover a wide range of interest areas and are designed to seek out individuals who do things that often go unnoticed. The 25th Annual Shining Stars Gala, previously known as the Celestial Celebration, will be held Saturday, Feb. 3, at The Cotillion Banquets in Palatine, and the awards will be presented at the event. Visit [www.mountprospect.org](http://www.mountprospect.org) for a nomination form and detailed list of categories. Nominations must be in writing and received no later than midnight Nov. 27.

## Auditor praises District 15:

Palatine Township Elementary District 15 has received good financial news. At a recent board meeting, Chief School Business Official

Michael Adamczyk reviewed a recent audit of the district's finances for the fiscal year that ended June 30. He said District 15 received an "unqualified" opinion from auditor Miller Cooper, which is the highest opinion that can be received. The auditor recognized District 15 follows generally accepted accounting principles and that the financial reports are an accurate representation of its financial condition.

## Palatine parks add adult care:

Palatine Park District has started a new volunteer stewardship effort with the Pursuit Adult Day Program. Pursuit is a cooperative presented by Clearbrook and the Northwest Special Recreation Association, which provides adult day services for individuals with disabilities who have transitioned out of high school. Members of the program recently participated in stewardship projects at Palatine Stables where they assisted

with the care of horses, facility maintenance and other projects. After volunteers completed their duties, they were given the opportunity to interact with the horses.

## Hanover Twp. holiday bazaar:

Hanover Township will host its annual "Holiday Bazaar in Bartlett," a two-day craft show and bake sale, from 9 a.m. to 3 p.m. on Friday, Nov. 17, and Saturday, Nov. 18, at the Hanover Township Senior Center, 240 S. Route 59 in Bartlett. Attendees will be able to shop more than 35 vendors. Admission and parking are free. The township also will host a Breakfast with Santa at the Stars-N-Stripes cafe in the senior center Saturday, Nov. 18. Tickets for the event are \$5 for children and \$10 for adults, with all proceeds donated to the Hanover Township Adopt-A-Senior Program, in which sponsors buy gifts for low-income seniors. For details or to purchase tickets for the breakfast, call (630) 83-5600.

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# Thank You Sponsors of Celebrate Ability Gala

Friday ~ November 3, 2017

To benefit



Programs & Services

**Special Thanks to  
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Donors, and  
Volunteers.**

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SLSF is the fundraising arm of NWSRA, supporting children and adults with disabilities through  
**Athletics • Inclusion • Programs • Scholarships • Transportation**



# e-Newsletter

VILLAGE OF SCHAUMBURG



## November Business Recognition

### **November Business of the Month:**

#### **Ala Carte Entertainment**

Ala Carte Entertainment is a long-time operator of over 20 restaurants, pubs, and entertainment venues in the Chicagoland area. Ala Carte is based in Schaumburg and employs about 1,500 employees at its restaurants across the region. Founded in 1970 by Fred Hoffmann, Ala Carte Entertainment has grown from a single restaurant to now 24. Some of Ala Carte's major concepts include Finn McCool's, Chandler's Chophouse, Famous Freddie's Roadhouse and Moretti's Ristorante & Pizzeria. Of these 24 total Chicagoland restaurants and pubs, five reside in Schaumburg. One reported source of pride for Ala Carte is that throughout the years, it has not had a single restaurant close for business.

Ala Carte has also been an active member of the community since its founding. It's a regular financial contributor and sponsor to a variety of local not-for-profit organizations. Most recently, Ala Carte was honored with the "Best Friend of Illinois Parks" award for its 30-year involvement with the Northwest Special Recreation Association (NWSRA). In addition to its long-term partnership, one of the most notable reasons for receiving the award was for raising \$1 million to assist with transportation of the NWSRA's clients from after-school programs to their homes. For more information, visit Ala Carte's [website](#).

Submitted updated: 12/6/2017 7:59 AM

# Harper College and NWSRA team up for Sensory Friendly Holiday Concert



**Harper College Symphony Orchestra members invited families to learn more about the instruments prior to the show. Karyn Emerald**

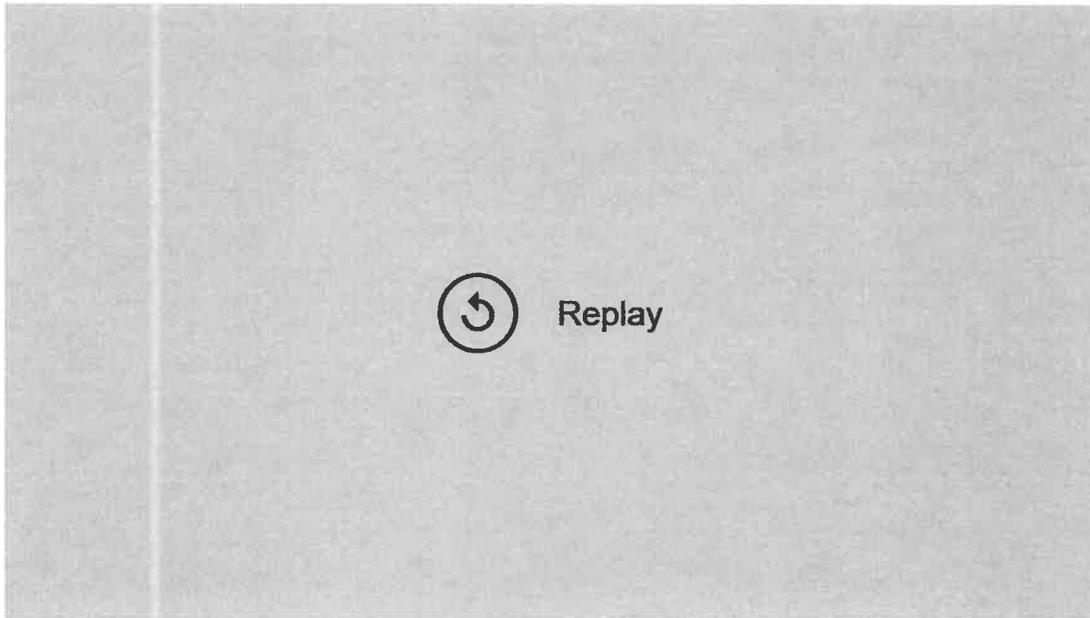
## Brian Selders

Attending a holiday concert is a favorite tradition throughout the United States in the month of December. Listening to the sounds of the holidays brings cheer and joy to many, and has become a tradition for many families as they immerse themselves into the holiday spirit. However, for many families of individuals with disabilities, attending a holiday concert can be a daunting challenge. For a child with Autism, tasks such as waiting in line and staying quiet throughout the performance can often become overwhelming and lead to outbursts. To avoid these stressful situations, many parents often decide to stay home.

Fortunately, these families had a venue to celebrate the holiday season at a sensory friendly Holiday Concert, held on Monday, December 4 at the Harper College Performing Arts Center. Through the collaborative efforts of the Harper College Symphony Orchestra and Northwest Special Recreation Association (NWSRA), families experienced the sounds of the holidays in a sensory friendly environment. As the Harper College Symphony Orchestra played,

staff from NWSRA were available to assist families throughout the concert to increase everyone's ability to learn concert etiquette and enjoy the show. Lights were dimmed, and "wiggling" and noises throughout the concert were completely understood by all in attendance. NWSRA Senior Manager of Special Recreation JoAnn Snyder stated "This was an amazing opportunity for families who otherwise would not be able to enjoy this experience. This also provided a great environment for individuals with disabilities to learn about proper etiquette with trained and certified staff."

ADVERTISING



inRead invented by Teads

Members from the Symphony Orchestra greeted the families in the lobby prior to the concert, as they played music and shared information about their instruments. In addition, attendees were invited to a demonstration of Autism Movement Therapy. Through cognitive re-mapping, Autism Movement Therapy is a sensory integration technique incorporating movement and music in collaboration with Positive Behavior Support (PBS) strategies to assist individuals with Autism Spectrum Disorders in meeting and achieving their speech and language, social and academic goals.

A parent who attended the event stated "Thank you for a wonderful Sensory Friendly Holiday Concert! We LOVED it and can't wait until next year. A new family tradition for us to get into the holiday spirit. Please be sure to tell the staff and performers a heartfelt "Thank you!" My son smiled and bobbed to the music the whole concert." William Anthony Porter, Harper Symphony Orchestra conductor, stated: "Harper College reaches out to our partners in many ways, and the Harper Symphony Orchestra is pleased to partner with NWSRA to bring the joy of the holidays to all of our community through music."

The sensory friendly Holiday Concert was held as a prelude to the annual Harper College Symphony Orchestra Holiday Concert, which will be held on Sunday, December 10 at 3:00 p.m. at the Harper College Performing Arts Center. For more information about the annual Holiday Concert, please contact the Harper College Box Office at 847.925.6100.

All proceeds from this event supported Special Leisure Services Foundation (SLSF), which is the fundraising arm of NWSRA. SLSF provides funding for scholarships, accessible transportation, athletics, inclusion support and more to ensure that children and adults with disabilities have every opportunity to recreate within their community.

## About NWSRA

Northwest Special Recreation Association (NWSRA) provides outstanding opportunities through recreation for children and adults with disabilities. NWSRA has grown tremendously over its 43 year history. NWSRA provides over 2,000 recreational programs and received more than 15,000 registrations annually. Athletics are very popular at NWSRA, with over 600 athletes competing in 16 sports. NWSRA has received the National Recreation and Park Association Excellence in Inclusion Award, given to one organization throughout the nation that has proven its leadership in the promotion of inclusion and diversity initiatives. NWSRA serves 17 northwest suburban communities, providing day camps, weekly programs, trips, special events, cultural arts and more. For more information on NWSRA, visit [www.nwsra.org](http://www.nwsra.org) (<http://www.nwsra.org>) or contact Brian Selders at 847-392-2848 or e-mail [bselders@nwsra.org](mailto:bselders@nwsra.org).

## Related Articles

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### **Sensory Friendly Holiday Concert**

**Nov 10, 2017**



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### **Enjoy music of the season at CLC's December concerts**

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# From the community: Harper College and NWSRA team up for Sensory Friendly Holiday Concert



Harper College Symphony Orchestra members invited families to learn more about the instruments prior to the show. (Posted by bselders, Community Contributor)

By **Community Contributor bselders**

DECEMBER 5, 2017, 11:43 AM

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*This item was posted by a community contributor. To read more about community contributors, click [here](#).*

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