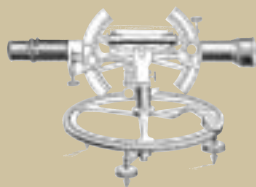


Truman Heartland Community Foundation



Charting
A Course
To
Charitable
Giving
In Eastern
Jackson County

**2001
ANNUAL REPORT**

GROWTH IN # OF FUNDS



T A B L E O F C O N T E N T S

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“The Truman Heartland Community Foundation is dedicated to serving and strengthening the Eastern Jackson County community, both present and future, by encouraging private giving for the public good”



PRESIDENT'S MESSAGE

As we settled upon a theme for this year's annual report -- Charting a Course to Charitable Giving -- I harkened back to my youth.

For an eleven-year-old on his fist Scout overnight, nightfall and a starry sky can make a camping trip full of wonder ... and a bit scary. But my father, our Scoutmaster, turned the darkness into an opportunity to learn something about nature and ourselves. Using the two "pointer stars" of the Big Dipper, he showed us how to find the North Star. Once located, we learned to orient ourselves and successfully navigate a hike without the benefit of daylight.

I liken that starry sky to the field of charitable giving. At times, needs can seem as numerous as stars. While many are compelling, to find your "north star" among them can be daunting. That's why your Community Foundation is here, to serve as your "pointer stars" to charitable giving. Once oriented, your charitable giving can grow from making a contribution to making a difference.

We're confident we're charting a successful course. In 2001, contributions to the Truman Heartland Community Foundation of nearly \$5 million helped build our asset base to over \$20 million, and helped us distribute \$1.375 million in grants to worthy causes in Eastern Jackson County.

The staff and I stand ready to assist you in charting a course for your personal philanthropy.

Sincerely,

Paul M. Thomson, Ph.D.
President and CEO



Harmony in the Heartland

Founded in 1982 – and bolstered by a 1994 merger with the Independence Regional Hospital Foundation – the Truman Heartland Community Foundation charts the charitable course in Eastern Jackson County, connecting local donors with local causes that interest them. With assets topping \$20 million and annual grants approaching \$1.5 million, the Foundation is a key financial resource for the community.

Raising Funds, Recognizing Volunteers

Each year, the benefit Gala helps fund the Foundation’s administrative expenses.



Helen French
Foundation Humanitarian of the Year

In 2001, the Gala’s sixth year, over \$90,000 was raised at pre-dinner reception at the Truman Presidential Library and an elegant dinner at the Community of Christ Church Temple in Independence. As always, the highlight of the evening was recognizing the volunteer leaders that spur our local communities.

Humanitarian of the Year

For nearly 40 years, Humanitarian Award winner Helen French has tirelessly worked toward a better Jackson County. Whether through the Foundation or the Independence School Board or limitless other contributions of time, energy, and enthusiasm, Helen’s reach has been extensive, especially in the areas of health and human services, education, and the arts.

Corporate Citizen of the Year

American Sterling Bank and its associates are dedicated to committing time and money to efforts that improve the quality of living and education for those who need it most. Over the last two years, the corporation has donated more than \$4 million to a wide variety of causes, from artistic preservation to medical research.

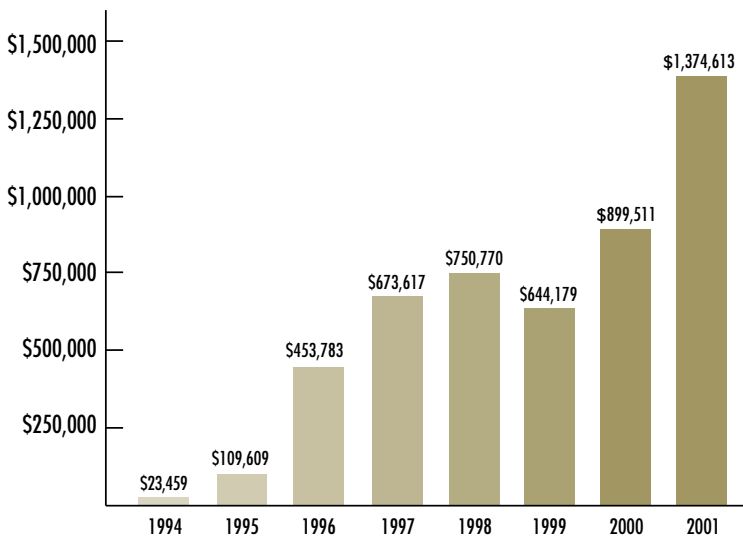


Chairman Norm Swails (L) and Foundation CEO Paul Thomson (R) present Steve Hull and Mike McGraw of American Sterling Bank with the Corporate Citizen Award.

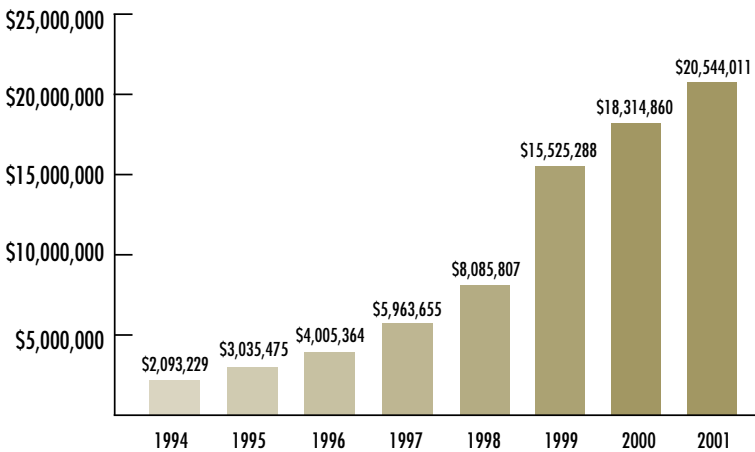
Citizens of the Year

Named as Citizens of the Year for their respective communities were: Derrick Warren, Blue Springs; Steve Gildehaus:, Grain Valley; Robert F. Glaser, Independence; Herman A. Johnson, Kansas City; Dave Wagner, Lake Lotawana; Betty McNought, Lee's Summit; Alyse Stoll, Raytown; and Lanard Toys, Inc., Sugar Creek.

Grants Awarded



Fund Balances





2001 Grants &

2001 Competitive Grant Program

Arts & Humanities Programs

Cultural Arts Coalition	\$5,000
Jackson County Historical Society	\$1,100
Lee's Summit Ministerial Alliance	\$2,500

Community Action Programs

Downtown Lee's Summit Main Street, Inc.	\$3,000
Greater Blue Springs Community Foundation	\$5,000
Independence Parks & Recreation	\$10,000
Lee's Summit Parks & Recreation	\$2,000

Education Programs

Sugar Creek Parks & Recreation	\$3,000
Community Mediation Center	\$2,000
Kansas City Harmony	\$4,500
Independence School District	\$2,000
Independence Youth Court	\$1,000
Lee's Summit Educational Foundation	\$2,000
Youth Friends	\$4,000

Health & Welfare Programs

Boys & Girls Clubs of Eastern Jackson County	\$3,200
Cancer Action - EJC Office	\$2,000
Child Abuse Prevention Association	\$5,000
Comprehensive Mental Health Services Foundation	\$1,000
The Drumm Foundation	\$3,300
Heart of America / Family Services	\$5,000

Hillcrest Ministries of E. Jackson Co.	\$5,000
Hope House, Inc.	\$10,000
Individual Creative Alternative Network	\$989
Jackson County Therapeutic Horseback Riding Pro.	\$3,000
Lee's Summit Senior Center	\$3,100
Lee's Summit Social Service	\$5,000
Lee's Summit Underwater Rescue & Recovery	\$5,749
Drug & Alcohol Abuse Referral / L.S. CARES	\$1,750
Evangelical Children's Home/Steppingstone	\$5,000
TOTAL	\$106,188

Foundation CEO Discretionary Grants

AME Church	\$1,000
Independence Police / National Peace Officers Memorial	\$300
Palestine Missionary Baptist	\$3,000
Lee's Summit Beautification Commission	\$1,000
City of Independence	\$1,042
Friends of Sugar Creek	\$500
One Good Meal	\$1,000
Midwest Hemophilia Association	\$100
TOTAL	\$7,942

Grants from named funds established by donors

TOTAL	\$1,063,423
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Scholarships

Scholarship Funds

Bess Wallace Truman Fund: Blair Smith, Erika Helm

John Bowser Radiology Fund: Krystal Wallis, Melody Howard, Jennifer Kindle

Steven D. Brown Fund: John Opperman

Greater Blue Springs Community Foundation General Fund: Kayla Thomas, Jennifer Meisel, Amanda Morton, Roger Bell, Christopher Shrum, Mark Zwierczek, Corey Epping, Steven Cade, Matthew Chrisman, James Kaden, Aaron Scully, Rachel McRae, Chrissy Wunderlich, Andrea Smith, Nathaniel Spilker

Sara Garret Fund: Jessica Heath

Brianna Leigh Shelton Performing Arts Fund: Brandy Johnson, Sarah Eberenz

Parr Scholarship for Blue Springs South: Blue Springs R-IV School District

Rusty Hodge Memorial Track/Cross County Fund: Tommy Brooks, Daniel Gammon

Sister Mary dePaul Fund: Ashley Slocum, Nicholas Estrada

Novilla Jeffries Scholarship Fund: Stasha Baker

Frank Kobe Fund: Mankel Hernandez

John Olivarez Family Fund "Human Relations Commission Scholarship": Drew Thornton

Stayton Parr & Patricia Davis-Parr Fund: Grain Valley R V School District

Raytown Rotary Club Fund: Rebecca Mozley, Nicole Anderson

Independence West Rotary Scholarship: Independence School District Foundation

Sugar Creek Business & Civic Fund: Eric Yasso, Christopher Larson, Richard Henley, Krystal Thompson, Ashley Scott,

Rachel Powell, Bradley Fullbright, Elizabeth Fullbright

Bill Summa Fund: Elizabeth Fullbright, Bethany Seaver

Toni Thornton AAUW Fund: Squina Cartwright, Georgia Traylor, Carolyn Lovelace, Cheryl Chavez, Lisa Gaume Jones, Ceola Knisely

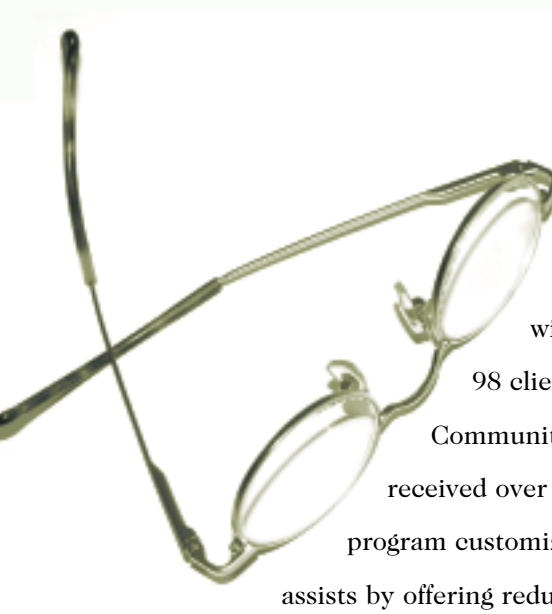
Harry S. Truman Fund: Janice Gumerman

Fort Osage Scholarship Foundation

- Carol Mareks Elementary Education Scholarship: Natalie Lyons
- General Fund: Elizabeth Hopkins, Brooke Hutchison, John Hayes, Jessica Engelman, Nokise Robertson, Nehemiah Hanson
- Harley & Doris M. Eby Reed Scholarship: Mike Bowerman
- Ben Whited Scholarship: John Waldman
- Fort Osage Leadership Scholarship: Jessica Engelman
- J. Richard Franklin Scholarship: Sarah Czeschin
- Robert Keeton Scholarship: Tara Phillips
- Dr. Victor D. Gragg Scholarship: Tara Phillips
- Arthur Butler Scholarship: Jason Pearson, Melissa Wilkes, Natasha Swayze, John Waldman
- Gragg Memorial Scholarship: Meghan Ashmore, Kyle Dieckmann
- Lee McDaniel-Yazel Scholarship: Tara Phillips, Kyle Dieckmann

Reaching the Char

With the Foundation focused on helping Chart a Course to Charitable Giving in Eastern Jackson County, it's always rewarding when entities reach their destination. Following are a few of the many examples in which the Foundation has helped chart the right course. To learn more about any of these programs, or how the Foundation can assist you, call us at 816-836-8189.



The Eyes Have It **Independence Lions Eye Fund**

Both the Independence and Host Lions Clubs partner with the Foundation to provide assistance with exams and eye glasses. In 2001, 98 clients referred by the Salvation Army, Community Services League and Hope House received over \$18,700 in services and products. A program customized by the LensCrafters Foundation assists by offering reduced rates in providing services.

Groceries and Grads

Cosentino Charitable Foundation Fund

Having owned food stores throughout metro Kansas City for many years, the Cosentino family values the importance of an educated and committed employee. A scholarship fund established through the Greater Blue Springs Community Foundation provides tuition assistance for Cosentino's Food Stores employees, helping 14 employees in 2001 attend Community College or four-year schools.



itable Destination

A Field of Dreams Logan Memorial Soccer Field

For over 20 years, Tom Logan was an active volunteer in the Lee's Summit Parks and Recreation

program, coaching hundreds of youth soccer players. When Tom unexpectedly passed away in 2001, the community responded by announcing that new soccer fields at Legacy Park will bear his name. The Foundation serves as fiscal agent for funds being contributed to the fields.



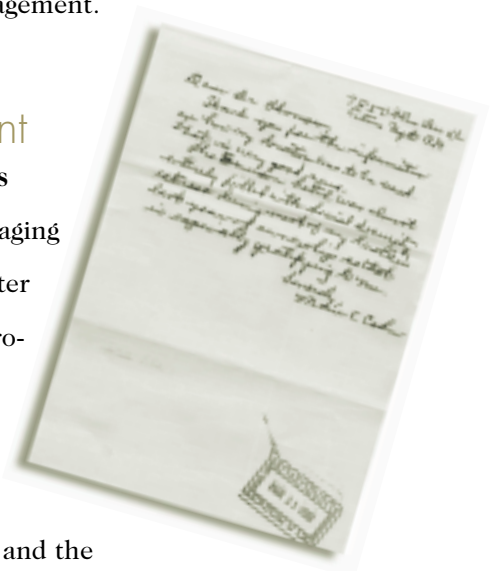
Flyin'

Valley Arts & Beautification Council

The first act of the VABC in Grain Valley was to acquire an art centerpiece for display at the new Community Center. *Flyin'*, a bronze sculpture depicting four children at play in a winter setting, was located and a fund raising campaign was undertaken, with the Foundation providing fund management.

A Good Senior Moment Apartments for Low-Income Seniors

When Marie Coker's brother left an aging inner city hotel in his estate, his sister was unsure what to do. She was introduced to the Foundation, and chose to donate the hotel in memory of her brother. Proceeds from the hotel's sale went to the Foundation, and the property has become apartments for low-income seniors.





Donor-Advised Funds

Total Fund Assets \$2,478,113

New Funds in 2001:

- Beem Family Fund
- Dr. Lyle E. Boyles Fund
- Samuel W. Edmunds Charitable Fund
- Steven W. and Debra R. Gildehaus Charitable Fund
- Gr. Blue Springs Foundation:
 - Shaver Family Foundation Fund
 - Cosentino Charitable Fndn. Fund
 - Dr. V. Carl and Betsy Jelley Family Foundation
- Heggstad Family Fund
- Russell Family Foundation Fund
- Daniel E. and Alice D. Waite Family Foundation
- Widick/Appleberry Family Fund

Charitable Gift Annuity Funds

Total Fund Assets \$438,100

New Funds in 2001:

- Paul D. Lamb Gift Annuity
- Dennis & Jane Taylor Gift Annuity

Charitable Remainder Trusts

Total Assets \$5,102,028

New Fund in 2001:

- Samuel W. Edmunds Charitable Lead Trust

Unrestricted Funds

Total Assets \$2,150,955

New Fund in 2001:

- Marjorie Pollard Hospice Fund

Designated Funds

Total Fund Assets \$7,320,388

New Funds in 2001:

- Cancer Action Fund
- City of Indep. – General Fund
- Eastern Jackson County Youth Court Fund
- Family Literacy Fund
- Friends of Sugar Creek Fund
- Lee’s Summit Parks & Rec. Fund
- Puppetry Arts Inst. Museum Fund
- Michael Kuhn Memorial Fund
- Neo Natal Care Center Fund
- Nativity of Mary Scholarship Fund
- Raytown Emergency Assistance Program (R.E.A.P.)
- School of Economics Fund
- September 11th Fund
- Tom Logan Memorial Soccer Field Fund
- Turning Point Fund



n t r i b u t i o n s

Field of Interest/Scholarship Funds

Total Fund Assets \$2,804,008

New Funds in 2001:

- Bryant School & Neighborhood Playground Fund
- Children's Performing Theatre – Theatre in the Park Fund
- Cultural Arts Coalition Fund
- Fort Osage R-1 School District Foundation component funds:
 - Vilas "Lee" Compton Memorial Scholarship
 - Judy Lee McDaniel-Yazel Scholarship
 - Carol Marcks Elementary Education Scholarship
- Grain Valley Art and Beautification Council Fund
- Greater Blue Springs Community Foundation component funds:
 - Missouri Rehabilitation Assoc. Max T. Prince Scholarship
 - Rusty Hodge Memorial Track & Cross Country Scholarship
- Greater K.C. Friends of Family & Consumer Science Fund
 - Oak Park High School Scholarship
 - KC Friends of Family & Consumer Science Scholarship
- Greater Grain Valley Community Fund
- Independence School District Foundation component funds:
 - Ron Clemons Scholarship
 - Truman Chapter National Honor Society Fund
 - Independence National Education Association Scholarship
 - Youth Friends Scholarship
 - Phillip A. Parrino Scholarship
 - Friends of William Southern
 - Mistyka L. Fiedler Scholarship
- Judith Stitt Scholarship Fund
- Lake Lotawana Baseball Association Fund
- Lee's Summit Beautification Commission Fund
- Legacy Foundation
- Raytown Community Foundation Fund
- Sermon/Old Spring Project Fund

Truman Heartland is a supporting organization of the Greater Kansas City Community Foundation. GKCCF provides ongoing operational assistance through contracted services and capacity building grants.



YOUTH ADVISORY COUNCIL, NATIONAL YOUTH SERVICE DAY, APRIL 2001

HISTORY OF THE FOUNDATION



1982 - Independence Community Foundation is formed. Volunteer staff distributes about \$14,000 in grants each year.

1994 - Foundation merges with Independence Regional Hospital Foundation. Greater Kansas City Community Foundation is hired to help manage and administer \$1.8 million in assets. First full-time CEO, Bob Glaser, is hired.

1995 - Strong public awareness campaign raises asset base to \$3 million, with grants rising to \$100,000.

1996 - Rapid growth to over \$4 million in assets and more than 100 funds. Name change to Truman Heartland Community Foundation reflects growth throughout Suburban Jackson County. First-ever benefit Gala draws 550 guests and raises \$50,000.

1997 - Assets soar to nearly \$6 million. Barbara Potts named Humanitarian of the Year as 700 guests attend Gala at Truman Library.

1998 - Foundation Board Chairman Dr. Bob Watkins helps grow assets to \$8 million. Community of Christ Church completes five-year, \$1 million grant to cover Foundation administrative costs.

1999 - New CEO Dr. Paul Thomson helps orchestrate \$7.3 million in asset growth as new funds pour in and investments return 15.85% for the year. Newly restored Union Station hosts 800 Gala attendees, who raise \$80,000 for the Foundation.

2000 - Norman Swails leads the Board into Y2K. Assets of \$18.5 million help generate \$900,000 in grants for the 16 communities served by the Foundation. Chuck and Colleen Foudree receive Humanitarian Award and Blue Ridge Bank receives first Corporate Citizen Award.

2001 - Assets reach \$20 million and grants total \$1.375 million as Eastern Jackson County rises to occasion to overcome recessionary economy and 9-11 tragedy.

2001 Board of Directors



Chairman
Norman E. Swails
Community of
Christ



Vice Chairman
Thomas G. Holzbaur
Fluid Equipment
Company



Secretary
Mike Chappelow
Health Midwest
Independence



Treasurer
Tom Thomas
Blue Ridge Bank
and Trust



Past Chairwoman
Barbara J. Potts
Community Volunteer



Muriel Browder
Community
Volunteer



Carl Chinnery
Carl Chinnery &
Associates



Paul Consiglio
Mr. Steak
Restaurant



Karen Downey
Ronald Downey
Construction, Inc.



Colleen Foudree
Community Volunteer



Helen French
Community Volunteer



Rev. Tom G. Haley
Lee's Summit
Christian Church



Lydia Jeter
Blue Springs School
of Economics



J. Scott King
Attorney at Law



Michael Martin
Automated Tax and
Accounting



The Honorable
W. Stephen Nixon
Division 5 —
Circuit Court



Larry Norris
Community of
Christ



The Honorable
Carson Ross
State Representative



Freddy Smith
Community Leader



Dr. Tony Stansberry
Lee's Summit
School District



R. James Stilley, Jr.
Stilley, Fowler &
Stilley, P.C.



Karen White
Superior Consultant



Gerald E. Winship
Winship Travel



Shirley Wurth
Raytown School
District

STATEMENT of REVENUE, EXPENSES and
CHANGES in FUND BALANCES

	YEAR ENDING DEC 31, 2001
REVENUE AND SUPPORT:	
CONTRIBUTIONS:	
Unrestricted Funds	4,012
Donor Advisory Funds	473,095
Gift Annuity	210,000
Designated Funds	2,338,520
Field of Interest Funds	638,302
Charitable Remainder Trust Administration	927,802
Administration	286,738
TOTAL CONTRIBUTIONS	4,878,469
OTHER REVENUE:	
Money Market Portfolio	
Checking/Sweep Account Interest Income	2,662
GKCCF Money Market Pool Interest Income	86,827
Total Money Market Portfolio	89,489
Fixed Income Securities Portfolio	
Interest Income	228,344
Capital Gain/(Losses)	60,955
Total Fixed Income Securities Portfolio	289,299
Equity Securities Portfolio	
Dividend Income	97,858
Capital Gain/(Losses)	(830,887)
Total Equity Securities Portfolio	(733,029)
Bank Managed Portfolios	
Dividend Income	14,863
Capital Gain/(Losses)	(60,429)
Total Bank Managed Portfolio	(45,566)
Charitable Remainder Trust Portfolio	
Interest and Dividend Income	190,287
Capital Gain/(Losses)	(372,787)
Total CRT Portfolio	(182,500)
Other Investment Earnings	
Tax Credit Revenue	
Tax Credit Handling Fees	9,410
Real Estate Rental Income	
Capital Gain/(Loss) - Stock Gifts	(285)
Capital Gain/(Loss) - Land	-
Total Other Investment	9,125
TOTAL OTHER REVENUE	(573,181)
TOTAL REVENUE AND SUPPORT	4,305,288
GRANTS AND EXPENSES:	
GRANTS:	
Unrestricted Funds	100,875
Donor Advisory Funds	185,206
Designated Funds	750,983
Field of Interest Funds	337,549
Total Grants	1,374,613
ADMINISTRATION EXPENSES	
Directly assignable fund expenses	419,588
Administrative expenses	392,261
Total Admin. Expense	811,849
TOTAL GRANTS AND EXPENSES	2,186,462
REVENUE LESS GRANTS AND EXPENSES	2,118,826
FUND BALANCE, beginning of period	18,284,083
FUND BALANCE, end of period	20,402,909

BALANCE SHEET

ASSETS	DEC 31, 2001	DEC 31, 2000
CASH		
Checking/Sweep Account	189,974	78,664
Petty Cash	995	995
Total Cash	190,969	79,659
INVESTMENTS, at fair market value		
Cash-GKCCF-Money Market Portfolio	3,446,349	1,333,985
Fixed Income Investment Portfolio	3,178,564	3,279,674
Equity Investment Portfolio	6,985,573	7,089,067
Bank of America Portfolio	57,249	57,853
Commerce Bank Portfolio	499,577	597,873
Charitable Remainder Trust Portfolio	5,105,896	5,653,822
Total Investments	19,273,208	18,012,274
OTHER ASSETS		
Prepaid Expenses	10,946	-
Accounts Receivable	-	203,189
Pledges Receivable	886,888	44,816
Prepaid Expenses	-	270
Contributions Receivable	2,500	307
Real Estate	179,500	139,500
Total Other Assets	1,079,834	388,082
TOTAL ASSETS	20,544,011	18,480,000
LIABILITIES AND FUND BALANCES		
ACCOUNTS PAYABLE	15,067	34,382
GRANTS PAYABLE	126,035	161,550
TOTAL LIABILITIES	141,102	195,932
FUND BALANCES:		
Unrestricted	2,150,955	2,391,336
Donor Advised	2,478,113	1,449,358
Charitable Gift Annuity	438,100	261,964
Designated	7,320,388	5,902,709
Field of Interest	2,804,008	2,619,480
Charitable Remainder Trusts	5,102,028	5,653,822
Administration	109,317	36,206
TOTAL FUND BALANCE	20,402,909	18,314,875
TOTAL LIABILITIES AND FUND BALANCE	20,544,011	18,480,015



TRUMAN HEARTLAND COMMUNITY FOUNDATION
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