



*Our mission is to improve the quality of life on Whidbey Island by **providing support** for the nonprofit sector, **assisting donors** to build and preserve enduring assets for charitable purposes, and meeting community needs through **financial awards***

ANNUAL REPORT 2017

Supporting Our Mission in 2017

During our first full year of operations, the Whidbey Community Foundation has worked diligently to create policies and procedures, increase our Board of Directors, and build our capacity to support our mission statement. As described below, we made great strides in all aspects of our mission and are looking forward to greatly increasing our activities in the upcoming year.

➤ **“Providing Support for the Nonprofit Sector”**

Washington Nonprofits Listening Tour

An example of our nonprofit support was a meeting the Whidbey Community Foundation held in Freeland on October 11. The meeting was a chance to gather all Whidbey nonprofits together in one place, and introduce them to both the Whidbey Community Foundation and to the support available to them through Washington Nonprofits. 45 people attended this first meeting, which was held in space donated by Whidbey Telecom and underwritten by Whidbey Island Bank (a division of Heritage Bank). According to results of a survey passed out at the event, more than 50% of the attendees were from small nonprofits. Overwhelmingly, the “most valuable part” of the meeting was listed as Networking. When asked for ideas of training topics they would like the Whidbey Community Foundation to provide in the future, there were 28 responses; and another 12 suggestions for Other Types of Support we could provide. Topic ideas included fundraising, board recruitment, working with volunteers, business partnerships, dealing with legal issues, and social media. Additional networking opportunities were requested by many of the nonprofits. Plans are underway for multiple events in 2018.



Online Nonprofit Directory

Along with the creation of our new website (www.whidbeyfoundation.org), the Whidbey Community Foundation is creating an online Nonprofit Directory. This will be the first comprehensive directory listing all nonprofits working on Whidbey Island. In addition to basic information and a short description, the Nonprofit Directory sorts nonprofits into categories such

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as Education or Environment, making it easier for donors, volunteers, or potential clients to find the resources they are looking for. To ensure that the nonprofit you support is listed, check the website or contact us at info@whidbeyfoundation.org.

➤ **“Assisting Donors”**

Founding Investors

Whidbey Community Foundation has created a number of different avenues for donors to contribute to life on our Island. For those who wish to make a general donation to support the work of the Community Foundation and the nonprofits we support, contributions can be made in person, by mail, or online (www.whidbeyfoundation.org).

We are grateful to our Founding Investors in 2017:

- **Cornerstone Donors** (cumulative donations of \$10,000 or more)
 - Whidbey Island Bank, a division of Heritage Bank
 - Debora Valis and Steven Shapiro Family Fund
 - George and Sheila Saul
 - Nancy Conard and Gordon McMillan
 - Goosefoot Foundation
- **Partner Donors** (cumulative donations of \$5,000 - \$9,999)
 - Anonymous



Christmas Sculpture Fund

Randy Hudson and George Gerber have been contributing to nonprofits on an annual basis for 19 years through their Christmas Sculpture Project. In 2017 they partnered with Whidbey Community Foundation to create a more seamless online avenue for collectors to participate in the project. For a minimum donation of \$200, contributors to the fund received the 2017 Georgia Gerber Christmas Pewter Owl Sculpture. All proceeds after costs are being donated to nonprofit organizations on Whidbey Island.

First Estate Plan – Legacy Giving

A local couple who retired to Whidbey Island eight years ago from Seattle has recently decided to bequest a portion of their estate to the Whidbey Community Foundation. The couple, who wish to remain anonymous, decided to include the local community foundation after learning about its ability to extend their legacy of giving even after their death. After deciding upon an amount that they wanted to leave for their children the couple discussed how to allocate the balance of their estate and concluded that a local Community Foundation that possessed both intimate knowledge of the Island’s charities and the ability to professionally manage their funds make perfect sense for them. The couple identified four nonprofits that are to receive a specific amount of proceeds, with the remainder of the funds being focused on charities that assist veterans, homeless and/or vulnerable children and senior citizens. “All in all, the Whidbey Community Foundation provided us one-stop resourcing for how we can most efficiently and effectively benefit Whidbey Island long after we are passed and gone”, said the couple.

➤ **“Financial Awards”**

In 2017 the Whidbey Community Foundation was pleased to be able to provide financial support to the following nonprofit organizations with donor-designated grants:

- Sno-Isle Regional Library Foundation: \$29,350
- Readiness to Learn Foundation: \$4,000
- South Whidbey Good Cheer: \$4,000

Building Our Capacity for 2018

Board of Directors:

- Steve Shapiro (President), founder of Island Athletic Club
- Robin Hertlein (Secretary/Treasurer), owner of Hertlein Grant Writing
- Nancy Conard (Executive Director), former Mayor of Coupeville
- Bob Severns, Mayor of Oak Harbor
- George Saul, former technology company executive, community volunteer
- Helen Price Johnson, Island County Commissioner
- Sara Kelly, attorney
- Brian Jones, owner of Ellkay/CareEvolve



Operations Fund:

Beginning Balance	\$20,039
Revenues	45,710
Expenses	<u>30,928</u>
Ending Fund Balance	\$34,821

Donation Funds:

Revenues	\$45,655
Grants	<u>37,350</u>
Ending Funds Balance	\$ 8,305