

Investing in our Community

Since 1968, thousands of people like you have contributed gifts ranging from \$2 to \$2 million. These resources are pooled to create our community endowment. By giving together, we achieve the greatest impact today while simultaneously building philanthropic possibilities for generations to come.

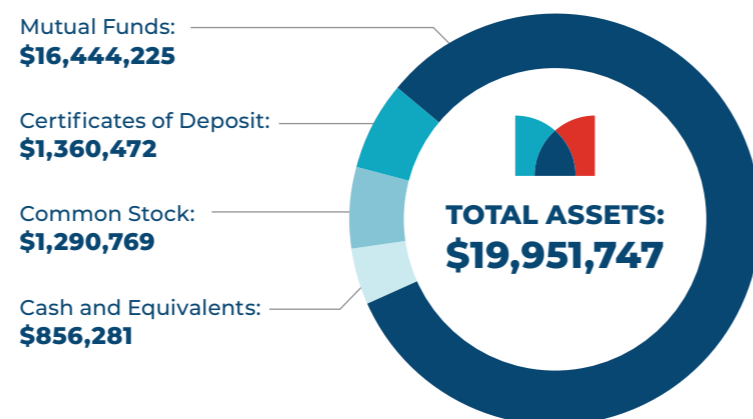
CONTRIBUTIONS
RECEIVED:
\$1,009,749

TOTAL REVENUES,
GAINS, AND OTHER
SUPPORT:
\$4,015,916

10-YEAR AVERAGE
RATE OF RETURN:
6.61%

TOTAL DISBURSEMENTS
FROM ALL FUNDS:
\$811,946

OPERATIONAL
EXPENSES:
\$256,636*
*1.28% of total assets



In Memoriam

The Marshall Community Foundation was saddened by the passing of Board member and friend, Dr. Lynne Haley in 2023. Dr. Haley served her community as a Foundation Board member for 23 years. Over her tenure, she most notably served as chair of the Grant Review Committee and member of the Executive Committee, and was unanimously approved to serve as an Emeritus member of the Foundation's Board of Trustees. She was a groundbreaker in her own right, and freely shared her wisdom to help guide the Foundation toward the best possible outcome in every situation. Most importantly, Dr. Haley was deeply committed to those whom she cared for most, and the Foundation is forever made better for her service and love.

The Marshall Community Foundation is here to help you make the impact you want to see in our community. We collaborate with you to achieve your philanthropic goals, so you can have confidence that your donations are being used in the most effective way possible—both today and forever!

Are you thinking of making a gift to the Foundation? We can process donations of cash, stock, bonds, mutual funds, real estate, IRA accounts, bequests, or life insurance policies. For more information about these and other types of donations or establishing an estate gift, contact the Marshall Community Foundation or consult with your legal or professional financial advisor.

Together, we can build our community's endowment for lasting impact: Today, tomorrow, and forever.

MARSHALL COMMUNITY FOUNDATION

Impact Report

2022-2023 FISCAL YEAR

As a Foundation for the community, we are proud to serve as a clearinghouse for local generosity. We (and we mean **WE**, because none of this is possible without you) contributed nearly \$812,000 to local charitable organizations and individuals through scholarships this last fiscal year. The Marshall Community Foundation works hard to anchor every dollar we distribute to our community's common interests and goals.

Fulfilling our purpose on behalf of the greater community is an ongoing mission. We work diligently to build a sustainable source of funding, collaborating with people like you who also want to make a difference locally.

And you **ARE** making a difference. For every dollar donated and distributed, we are making a difference in the lives of our friends and neighbors for generations.

We are grateful for your commitment to our community and for trusting the Marshall Community Foundation with your philanthropic goals: Today, tomorrow and forever!



In 1968, several forward-thinking, Marshall-loving community leaders gathered to establish the Marshall Civic Theatre Foundation with the goal of saving the Brooks Memorial Methodist Church building. After surpassing their initial expectations and supporting numerous other community-oriented projects over the next 23 years, they changed the organization's name in 1991 to what we know it as today: The Marshall Community Foundation.

Nearly 60 years after the first \$50 bill in the middle of the table, the Marshall Community Foundation has surpassed \$14,189,377 in grants and scholarships to strengthen the local non-profit sector and assist individuals in pursuing their educational goals. It would be difficult to find an area of our community that has not been positively influenced by the Foundation. For every person impacted, non-profit agency empowered, or program launched, there is an individual like you who has made the decision to be generous.

It is the Foundation's mission to partner with you to ensure our area remains a wonderful place to live, work and raise a family. We do this by:

- Attracting permanently endowed funds from a wide range of donors
- Serving as a conduit or convener for special projects
- Distributing grants in support of innovative programs and projects
- Always being mindful to carry out our donors' intentions.

For every dollar donated, you help us ensure that which we love most about our community will continue to thrive. We are privileged to take this moment to express our sincere appreciation for all those who choose to give to and through the Marshall Community Foundation.

Your generosity is making an impact now, and FOREVER!

Most sincerely,

The Marshall Community Foundation Board of Trustees



**MARSHALL
COMMUNITY
FOUNDATION**

2022-2023

Board of Trustees

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Trustee Emeriti

Pastor Richard Gerten

Dr. Lynne Haley*

Mark Stuart, J.D.

Community Impact

Contributions to our community endowments, The Fund for Marshall and Marshall Youth Fund, help ensure there will always be philanthropic resources available to respond to needs and opportunities in the greater-Marshall area, both today and forever. The Foundation utilizes a portion of the earnings on these endowed resources each year to invest in our community through distributions to worthy causes.

TOTAL DISBURSEMENTS: \$149,248

Community Leadership & Engagement

Volunteers embody the spirit of being the change you wish to see. Their commitment to the community is evident in the outcome of their work. The Foundation is grateful for our volunteers and for their selfless and ongoing leadership in our community.

BOARD OF TRUSTEES AND ITS COMMITTEES: 35

YOUTH ADVISORY COUNCIL: 28

SCHOLARSHIP VOLUNTEERS: 185

If you are interested in being considered for one of the Foundation's committees, please visit marshallcf.org/volunteer/ to submit an inquiry.

Endowed Net Assets

Unrestricted Funds

The flexibility of donations to unrestricted funds allows the Foundation to respond to the local non-profit sector's greatest needs in any given year.

TOTAL ASSETS: \$790,384

Field of Interest Funds

These funds allow donors to identify personal areas of interest such as the arts, social services, education, or parks, etc., while relying on the expertise of Foundation staff to apply available resources to applicable worthy issues.

TOTAL ASSETS: \$2,288,372

Donor Advised Funds

A flexible solution to charitable giving, advised funds allow donors to make grants to charitable organizations over time while the Foundation manages all administrative work.

TOTAL ASSETS: \$2,533,024

Organizational Funds

Organizational funds benefit a predetermined nonprofit agency by providing ongoing annual support to that organization's mission in perpetuity.

TOTAL ASSETS: \$2,343,689

Scholarship Funds

Scholarship funds allow individuals to pursue their educational and enrichment goals.

TOTAL ASSETS: \$6,359,362

Non-endowed Community Project Funds

The Marshall Community Foundation accepts donations and makes distributions on behalf of local charitable initiatives.

TOTAL ASSETS: \$584,577

The Foundation continues to engage members of the community to further refine these priorities for optimum impact, and to help ensure a thriving community for generations to come!

The Marshall Community Foundation has come a long way in its nearly 60 years, experiencing broad community support leading to tremendous growth. To further clarify our goals and objectives, the Marshall Community Foundation Board of Trustees recently assessed the Foundation's potential long-term community impact. With the goal of ensuring continued organizational success while providing clarity, focus, and a forward-thinking vision, they began the arduous process of aligning foundational priorities for the greatest community impact. From these efforts, the Foundation announces its first set of Strategic Priorities:



Community Vitality

Assure Marshall remains an attractive and vibrant place to live by supporting arts, culture, recreation, and community improvement initiatives.



Education

Ensure that Marshall residents of all ages have access to the resources they need to succeed, including high-quality educational opportunities that prepare them for lifelong learning and productive careers in our local workforce.



Essential Needs

Uphold area non-profits that serve the most vulnerable and underserved populations of our community so they may continue to ensure that Marshall-area residents have access to resources such as mental and physical health care, food security, clothing, shelter, and public safety.