



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 17, 2017 - 3:30 p.m.
Park Central Conference Room
3000 W. Central Road, Rolling Meadows, IL

AGENDA

- I. Call to Order
Roll Call
- II. Introduction of Guests:
 - A. None
- III. Approval of Agenda
- IV. Approval of Minutes – Pages 3-9
- V. Correspondence
 - A. Written
 - B. Oral
- VI. Reports – Pages 10-40
 - A. SLSF Reports – 2016 YE
 - 1. Events – Wrap Up
 - a. 2016 Actual vs. Budget
 - b. Celebrate Ability Gala
 - 2. Grants
 - 3. Sponsor Progress Report
 - 4. 2016 4th Quarter Goals
 - 5. Annual Appeal Fund 2016
 - 6. NWSRA Scholarship Report
 - B. Marketing and Public Relations Report
 - C. NWSRA Program Report
 - D. NWSRA Lightning Booster Club – Oral Report
- VII. Review of Financial Statements/Investments – Pages 41-59
 - A. SLSF Investment Update
 - B. Organizational Cash Overview
 - C. SLSF Budget vs. Actual
 - D. Balance Sheets
 - E. 4th Quarter Financial Report
 - F. Other
- VIII. Approval of Warrant: - Pages 60-66
 - A. Motion to approve Warrant 11 - \$65,309.77
 - B. Motion to approve Warrant 12 - \$161,278.05
 - C. Motion to approve Warrant 12A - \$6,087.00

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- IX. Old Business: - Pages 67-76
 - A. Hanover Park Park District/Pursuit 2
 - 1. Lease
 - 2. Memorandum of Understanding
 - 3. Ramp Update/Timeline
 - B. Snoezelen Room Update - Oral
- X. New Business: - Pages 77-87
 - A. Installation of Officers
 - 1. Carl Arthur – Chairman
 - 2. Jim Houser – Vice Chairman
 - 3. Amy Charlesworth – Secretary/Organizational Treasurer
 - B. Recognition of Board Members:
 - 1. Tim Schaap – Retiring Board Member
 - C. Installation of New Board Members:
 - 1. None
 - D. Approval of Terms and Committees
 - E. Appointment of Legal Counsel:
 - 1. Massucci, Blomquist, Anderson & Dunn
 - F. Appointment of President – Tracey Crawford – Resolution 2017-4
 - G. Approval of Resolutions:
 - 1. Resolution 2017-6 Benjamin F. Edwards & Co.
 - 2. Resolution 2017-7 BMO Harris Bank BAC
 - H. Warrant #1 - \$5,831.43
 - I. Annual SLSF Investment Transfer
 - 1. None
- XI. Information/Action Items – Pages – 88-139
 - A. Proposed Budget 2017
 - B. 2017 Goals and Strategies
 - C. SLSF Board Meeting Calendar
 - D. 2017 Event Calendar
 - E. Board Member Annual Review Form 2016 - Oral
 - F. American Philanthropic Development Plan Update
 - 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

**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 18th OF OCTOBER 2016**

Director Oates called the meeting to order at 3:44 p.m. Those present were Stephanie Bertelsen, Tom Campone, Vicki Carney, Jacky Cartwright, Amy Charlesworth, Christina Ferraro, Anthony Gattuso, Jim Houser, Kathy Nowicki, Terri Oates, Brian Rubin, Jonathan Salk, and Tim Schaap.

Absent were: Carl Arthur, Ernie Blomquist, Rita Fletcher, Dennis Hanson, Tom Perkins, and Dennis Stein.

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

Superintendent Sowa introduced the following guests: Al Crook, Perspective Board Member; Matt Gerken, American Philanthropic; Rick Wulbecker and Bob O'Brien, Hanover Park Park District

Approval of Agenda for October 18, 2016

Director Oates called for a motion to approve the Agenda for October 18, 2016. Director Schaap moved and Director Charlesworth seconded the motion. Upon voice vote the motion carried.

Approval of Minutes, May 18, 2016

Director Oates called for a motion to approve the minutes for the May 18, 2016 meeting. Director Salk moved and Director Houser seconded the motion. Upon voice vote the motion carried.

Correspondence

Written: President Crawford reported that a donation was received from the Clearbrook/PAL Program for Celebrate Ability.

Oral:
None

SLSF Reports

Events

Superintendent Sowa and Cathy Splett reviewed the Golf Outings for the year. Their reports are as follows: The Moretti's/NWSRA Golf Outing was very successful in netting \$23,434 which represents \$5,721 over what was budgeted. Ala Carte was able to get several items sponsored for this event which kept costs very low. The Arlington Classic Golf Outing did not fair very well this past year. This outing's revenue is split with the Arlington Heights Rotary Club. The net revenue for this outing was \$23,614. SLSF's portion was \$13,307. Talks have begun on making the profits more of what is needed for SLSF. The Women's Golf Outing was successful this year. The price was increased by \$5 because it was noted that there had not been an increase since 2002. There were less golfers this year; SLSF was informed that it was because there was no school on the outing day due to construction at the area schools. Even with less golfers the outing still netted over the budgeted amount. It was also suggested by SLSF President Tracey Crawford that in order to keep our caddy auction new and appealing, that SLSF

purchase the “themed”/incentive items for new caddies. This will be implemented in 2017 as well as preparing to celebrate the 25th anniversary of the Women’s Golf Outing. The Terrazzo and Marble Golf Outing is a 14 year old golf outing that was created by a former volunteer coach of NWSRA. This outing was successful in netting \$3,000 over the budgeted amount. The Buffalo Grove Golf Outing is a collaborative outing with the Buffalo Grove Rotary Club and has been in existence for 23 years. They increased their golfer price by \$10. This did not affect the outing as it netted over the budgeted amount. Palatine Hills Golf Outing is the golf outing that is restricted to NWSRA Athletics. This outing did not meet budget but only fell short by \$153. The decrease in registration was due to the outing being the Thursday after Memorial Day and UPS in the past has been able to send 6 foursomes. However, this year was not able to attend due to their own limitations. Gary Erickson brought in \$1,000 for his participation because he asked friends and family to sponsor his golfing.

Grants

Cathy Splett, Foundation Coordinator reviewed the grant activity stating that since January SLSF has applied for \$172,996 in grants and has been approved for \$99,443. SLSF has made new connections in grants with The Astellas Foundation, ESPN, Inc. and the Rotary clubs of Arlington Heights, Buffalo Grove, Schaumburg/Hoffman and Rolling Meadows. Much of these grants were for the support of the sensory room. SLSF is trying to create grant opportunities with the Townships of Palatine and Wheeling for transportation as well. SLSF is still waiting on a response for our grant submitted to the Illinois Department of Transportation.

Sponsorships

Superintendent Sowa reviewed the Sponsorships. She reported SLSF received a total of \$107,375 in sponsorships which includes sponsorships at all the golf outings. She is also happy to report that Zurich has increased their sponsorship from \$3,000 to \$5,000 and Teleflex has increased their support from a table sponsor to a silver sponsor for the Celebrate Ability Gala.

Goals

Superintendent Sowa reviewed the SLSF goals stating progress of each goal is listed in red on the goal sheets in the Board packet. Superintendent Sowa highlighted the 2 anonymous monthly donations as well as 1 repeated monthly donor that has supported SLSF for the past 15 years. Director Gattuso made a suggestion to have an iPad at each event which would allow for sign up of monthly donations. Superintendent Sowa also made note to the Board that the Windy City Bulls allowed our NWSRA Basketball team to be “seeded” with the prospective players. They are also going to allow our athletes to have a practice with the team. The Windy City Bulls have also participated in our Women’s Golf Outing as Caddy’s and were hole sponsors. She also made the Board aware that the IMPACT auction that will take place at the Celebrate Ability Gala will be for the PURSUIT 2 location.

Marketing & Public Relations

Brian Selders, Superintendent of Communications and IT, reported on the busy summer event videos that he developed. Each video features a specific golf outing and also asks “What’s your why?” to participants; why they support SLSF. The recent social media campaign focused on the Snoezelen Room. Former Mayor of Rolling Meadows, Ken Nelson will be narrating the videos. The Terrazzo and Marble partnership was featured in the Chicago Tribune and the Daily Herald, which was also shared on their web page.

NWSRA Program Report

Jayne Finger, Superintendent of Recreation, relayed to the Board that SLSF was able to award 212 scholarships to 163 individuals so far this year. NWSRA reached out to 26 families and were asked to give testimonials. At this time Superintendent Finger shared several of the testimonials with the Board regarding programs and the availability of scholarships for those programs. Many families informed NWSRA that without scholarships participation would not be possible.

Financial Reports

Organizational Cash Overview

President Crawford summarized the current status of SLSF Investment Funds and reported that the portfolio is doing well and in conservative investments. The investments will remain there until after the election. She also highlighted some line items on the quarterly reports. Trustee Charlesworth made special note on the detail of the report and mentioned that questions are answered before even asked.

Approval of Warrants

President Crawford called for a motion to approve Warrant #6 dated June 17, 2016 in the amount of \$63,695.45. Director Carney moved and Director Houser seconded the motion. Upon roll being called the vote was as follows:

AYE: Stephanie Bertelsen, Tom Campone, Vicki Carney, Jacky Cartwright, Amy Charlesworth, Christina Ferraro, Anthony Gattuso, Jim Houser, Kathy Nowicki, Terri Oates, Brian Rubin, Jonathan Salk, and Tim Schaap.

NAY: None

The motion carried.

President Crawford called for a motion to approve Warrant #7 dated July 20, 2016 in the amount of \$18,645.21. Director Campone moved and Director Bertelsen seconded the motion. Upon roll being called the vote was as follows:

AYE: Stephanie Bertelsen, Tom Campone, Vicki Carney, Jacky Cartwright, Amy Charlesworth, Christina Ferraro, Anthony Gattuso, Jim Houser, Kathy Nowicki, Terri Oates, Brian Rubin, Jonathan Salk, and Tim Schaap.

NAY: None

The motion carried.

President Crawford called for a motion to approve Warrant #8 dated August 23, 2016 in the amount of \$6,232.09. Director Salk moved and Director Bertelsen the motion. Upon roll being called the vote was as follows:

AYE: Stephanie Bertelsen, Tom Campone, Vicki Carney, Jacky Cartwright, Amy Charlesworth, Christina Ferraro, Anthony Gattuso, Jim Houser, Kathy Nowicki, Terri Oates, Brian Rubin, Jonathan Salk, and Tim Schaap.

NAY: None

The motion carried.

President Crawford called for a motion to approve Warrant #9 dated September 19, 2016 in the amount of \$17,232.51. Director Bertelsen moved and Director Cartwright seconded the motion. Upon roll being called the vote was as follows:

AYE: Stephanie Bertelsen, Tom Campone, Vicki Carney, Jacky Cartwright, Amy Charlesworth, Christina Ferraro, Anthony Gattuso, Jim Houser, Kathy Nowicki, Terri Oates, Brian Rubin, Jonathan Salk, and Tim Schaap.

NAY: None

The motion carried.

President Crawford called for a motion to approve Warrant #10 dated October 10, 2016 in the amount of \$61,406.20. Director Campone moved and Director Cartwright seconded the motion. Upon roll being called the vote was as follows:

AYE: Stephanie Bertelsen, Tom Campone, Vicki Carney, Jacky Cartwright, Amy Charlesworth, Christina Ferraro, Anthony Gattuso, Jim Houser, Kathy Nowicki, Terri Oates, Brian Rubin, Jonathan Salk, and Tim Schaap.

NAY: None

The motion carried.

New Business

Induction of New Board Member

Director Oates asked for a motion to induct Al Crook as a new Director on the SLSF Board. Director Charlesworth moved and Director Houser seconded the motion. Upon voice vote the motion carried.

2017 Strategic Plan

President Crawford introduced Matt Gerken with American Philanthropic. She then reiterated her vision for SLSF when she began with the agency 2011. She and the SLSF team feel that they have taken SLSF to its maximum in house and that it is time to have a Development Plan. This plan needs to be done to ensure SLSF is reaching all potential new donors and support in the service area. Mr. Gerken then presented the Board with his proposal. After much discussion President Crawford asked for a motion to approve the proposal from American Philanthropic in the amount of \$10,000 with attorney approval. Director Campone moved and Director Rubin seconded the motion. Upon roll being called the vote was as follows:

AYE: Stephanie Bertelsen, Tom Campone, Vicki Carney, Jacky Cartwright, Amy Charlesworth, Christina Ferraro, Anthony Gattuso, Jim Houser, Kathy Nowicki, Terri Oates, Brian Rubin, Jonathan Salk, and Tim Schaap.

NAY: None

The motion carried.

Celebrate Ability

Superintendent Sowa reminded the Board that Celebrate Ability is November 11, 2016.

NWSRA Grant

Superintendent Finger presented the Board, for information purposes, the requested amount of the NWSRA ask. The amount requested was \$51,348.09. This amount supports the following areas: Scholarships, Programs, Inclusion and Athletics.

PURSUIT 2

President Crawford informed the Board that we are in the development stages of PURSUIT 2 at the Hanover Park Park District. The only snag is the state will not approve the space without a second egress directly out of the building. It is at this time that a formal discussion was had and President Crawford wanted to make certain that the Board was comfortable with making the investment into the ramp that needs to be built. The money needed for this project would be borrowed from SLSF's BF Edwards Investment Account and transferred to the BAC Account; with the intention of replacing the funds within the next few years. She also reiterated that Clearbrook has been very supportive and gives NWSRA its full backing. Director Rubin suggested to approve the negotiations and the amount not to exceed \$275,000. President Crawford asked for a motion to approve negotiations and the maximum to be \$275,000. Director Rubin moved and Director Schaap seconded the motion. Upon roll being called the vote was as follows:

AYE: Stephanie Bertelsen, Tom Campone, Vicki Carney, Jacky Cartwright, Amy Charlesworth, Christina Ferraro, Anthony Gattuso, Jim Houser, Kathy Nowicki, Terri Oates, Brian Rubin, Jonathan Salk, and Tim Schaap.

NAY: None

The motion carried.

Old Business

Snoezelen Room

Superintendent Griffin and Cathy Splett reported the installation and training of Snoezelen Room has begun. SLSF is very excited for this to open and for the Board to see it. They also informed the Board that they are very happy to report that they were able to raise all of the \$75,000 except \$21,547. Presided Crawford asked for a motion requesting the transfer of \$21,547 from SLSF's BF Edwards Investment Account into the BAC account. Director Salk moved and Director Oates seconded the motion. Upon roll being called the vote was as follows:

AYE: Stephanie Bertelsen, Tom Campone, Vicki Carney, Jacky Cartwright, Amy Charlesworth, Christina Ferraro, Anthony Gattuso, Jim Houser, Kathy Nowicki, Terri Oates, Brian Rubin, Jonathan Salk, and Tim Schaap.

NAY: None

The motion carried.

Information/Action Items

Holiday Luncheon

Nanette Sowa, Superintendent of Development, reminded the Board of the Holiday Luncheon and was excited to remind them that this is a huge thank you!

2017 Board Meeting Schedule

President Crawford informed the Board that the 2017 schedule includes the addition of a March meeting to discuss the Development Plan.

Adjournment

Being no further business to come before the Board, Director Oates called for a motion to adjourn the meeting at 5:24 p.m. Director Salk moved and Director Carney seconded the motion. Upon voice vote the motion carried.

Secretary

VI. Reports

2016 Actual Vs. Budget

Events		2016	Budget	Income to Expense Ratio
Gold Medal Fashion Show	Gross	\$ 58,517.00	\$ 57,639.00	64%
	Expense	\$ 21,318.49	\$ 20,444.00	36%
	Net	\$ 37,198.51	\$ 37,195.00	
	# attending	555		
	cost per person	\$ 38.41		
Buffalo Grove Classic	Gross	\$ 32,247.00	\$ 30,250.00	81%
	Expense	\$ 6,065.51	\$ 6,780.00	19%
	Net	\$ 26,181.49	\$ 23,470.00	
	# attending	126	110	
	cost per person	\$ 48.14	\$ 61.64	
Palatine Hills Golf Classic	Gross	\$ 28,670.00	\$ 29,450.00	79%
	Expense	\$ 6,058.74	\$ 6,685.00	21%
	Net	\$ 22,611.26	\$ 22,765.00	
	# attending	118	125	
	cost per person	\$ 51.35	\$ 53.48	
Ala Carte/NWSRA Golf Classic	Gross	\$ 26,901.00	\$ 26,830.00	87%
	Expense	\$ 3,493.62	\$ 5,271.50	13%
	Net	\$ 23,407.38	\$ 21,558.50	
	# attending	119		
	cost per person	\$ 29.36		
Women's Only Outing	Gross	\$ 18,045.00	\$ 19,000.00	78%
	Expense	\$ 3,959.28	\$ 5,190.00	22%
	Net	\$ 14,085.72	\$ 13,810.00	
	# attending	81		
	cost per person	\$ 48.88		
Arlington Classic	Gross	\$ 26,815.00	\$ 28,210.00	88%
	Expense	\$ 3,337.23	\$ 2,800.00	12%
	Net	\$ 23,477.77	\$ 25,410.00	
	# attending	109		
	cost per person	\$ 30.62		
T&M Golf Outing	Gross	\$ 19,110.00	\$ 16,450.00	76%
	Expense	\$ 4,658.40	\$ 4,355.00	24%
	Net	\$ 14,451.60	\$ 12,095.00	
	# attending	39		
	cost per person	\$ 119.45		
Celebrate Ability	Gross	\$ 87,354.87	\$ 87,200.00	66%
	Expense	\$ 29,410.26	\$ 25,989.00	34%
	Net	\$ 57,944.61	\$ 61,211.00	
	# attending	260		
	cost per person	\$ 113.12		
Totals	Gross	\$ 297,659.87	\$ 295,029.00	74%
	Expense	\$ 78,301.53	\$ 77,514.50	26%
	Net	\$ 219,358.34	\$ 217,514.50	

U:\Board Information\Board Packet Information\SLSF\2017\January 17 2017\2016 2015 SLSF Fundraising Events Comparisons

After Event Memo:

To: Tracey

From: *Nanette Sowa*

Event Name: Celebrate Ability Gala

Event Date: November 11, 2016

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 from a participant or their family 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 8 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-\$2500. No tickets for this raffle are sold at the Gala.

Event Preparation: The Gala committee begins meeting in March to plan that November's 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 and 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 2016, the monies from the Impact Auction went to furnishing the new PURSUIT 2 room.

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 evenings as well as include advertisements from the sponsors.

In 2016, the committee decided to use a mobile bidding platform. Nanette called seven agencies in the area that use this service and all recommended using 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. The one downfall of using this system was the lack of excitement during the Impact Auction. The committee will discuss ways to add excitement back into that part of the evening. Using the service also added an additional

expense of close to \$4000 to the event. It is hoped that in future years, when guests are more comfortable with this method of bidding, the service will pay for itself in increased bids.

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 on the tables.

Committee Names: The 2016 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		
	DUTY	WHO
1	Arrive at Chevy 9:00 a.m	all
2	Do table count and check seats. Place Wheelchair cards at appr. Seats	CS
3	Take things out of Hunt Room and place on Tables	NS, Comm
4	Decorate Tables as needed	Comm
5	Put out bid sheets and tape down pink sheet on the bottom	NS, Comm
6	Put pens at each bid sheet	NS, Comm
7	Assemble programs: Bid card, CC form, pen	NS, Comm
8	Plaques on appropriate tables	CS
9	Set up registration	NS
10	Set cashier information under registration tables	CS
11	Set up bucket o'cheer	Comm
12	Set up and check AV	BS
13	Arrive back to the venue no later than 4:30	NS/CS
14	Greet Volunteers and familiarize them with their duties	SG/CS
15	Event runs	
16	Clean up after event, load bus/vans	ALL
17	Unload on Saturday morning	NS
18	Count money, do all follow-up from Monday after event until week of Thanksgiving when all should be finished	NS/CS/SG
19	Hold evaluation meeting with the committee no later than the second week of December	NS

Evaluation responses: Meeting to be held on Dec. 5, 2016.

Target Numbers: Because of the way the budget was planned in 2014, only what was raised is shown, not projected numbers. Budget is on left/actual on right.

Target #	2014	2015	2016
Gross Revenue	\$65,000/\$91,065	\$114,050/\$88,975	\$87,200/\$87,216
Expenses	\$20,000/\$25,711	\$26,050/\$24,928.95	\$25,534/\$28,662.33
Net Revenue	\$45,000/\$65,354	\$88,000/\$64,046.05	\$61,666/\$58,453.67
Registrations	\$27,100	\$35,000/\$25,900	\$25,000/\$25,477.50
Sponsorships	\$11,500	\$15,000/\$10,700	\$12,000/\$15,500
Silent Auction	\$7,780	\$10,000/\$11,210	\$10,000/\$13,631
Bucket O'Cheer	\$2860	\$2600/\$2545	\$2000/\$2020
Impact Auction	\$27,825	\$35,050/\$23,110	\$20,000/\$20,812.50
Cel. Abil. Raffle	\$14,000	\$16,400/\$11,100	\$18,000/\$9400

The 2016 Gala was truly a Gala. The décor was exciting, more guests than ever stayed to dance and the new mobile bidding eliminated the lines at check-out. The committee will discuss a modest raise in the ticket price in 2017 to cover the additional cost of the event. The SLSF team will also continue soliciting additional sponsors.

Board Report - Grant Activity for 2016

The following is a list of 2016 grant activity on behalf of SLSF/NWSRA

Governmental Grants

Pending				
Name	Purpose	Amount Requested	Status	Notes
Illinois Department of Transportation – IDOT grants vehicles to non-profit agencies through the Paratransit Vehicle Program.	Accessible Vehicle	\$ 63,000.00	Pending	NWSRA submitted a grant application for one 14 passenger vehicle to the Illinois Department of Transportation (IDOT) on 5.27.2016
		Total Government Grant Money Received in 2016	\$0	

Private Grants

Pending				
Name	Purpose	Amount Requested	Status	Notes
Palatine Township	Accessible Vehicle	\$10,000.00	Pending	SLSF requested funds to help purchase an accessible vehicle on 9.12.2016. Grant period is for 2017.
Wheeling Township	Accessible Vehicle	\$10,000.00	Pending	SLSF requested funds to help purchase an accessible vehicle on 9.23.2016. Grant period is for 2017.

Board Report - Grant Activity for 2016

The following is a list of 2016 grant activity on behalf of SLSF/NWSRA

Not Approved				
The Safeway Foundation	Accessible Vehicle	\$10,000.00	Not Approved	<u>GRANT STATION</u> - SLSF submitted a request to help purchase an accessible vehicle on 7.21.2016
The Mazda Foundation	Accessible Vehicle	\$5,000.00	Not Approved	<u>GRANT STATION</u> - SLSF submitted a request to help purchase an accessible vehicle on 6.23.2016
Approved				
Rotary Club of Palatine	Scholarships	\$ 3,000.00	\$1,000	SLSF sent the allocation application to request funds on 1.14.2016. Received funding on 2.26.2016
Elk Grove Township	Sensory Room	\$ 13,894.00	\$13,894	Funding from April 1, 2016 through March 28, 2017. SLSF to send invoice of \$1,157.83 April - Feb and invoice of \$1,157.87 March 2017
Rotary Club of Elk Grove Village	Scholarships	\$ 3,000.00	\$1,000	SLSF sent application to request funds on 1.14.2016
Zurich NA	Sensory Room	\$ 16,799.00	\$15,000	SLSF requested funds to help purchase GesterTek Cube and Bumpas for the sensory room on 2.18.16.

Board Report - Grant Activity for 2016

The following is a list of 2016 grant activity on behalf of SLSF/NWSRA

Rotary Club of Schaumburg/Hoffman Estates	General Program Support	\$ 4,988.56	\$4,850	SLSF requested funding to purchase items for 75 Sensory Bags on 4.4.2016. Request has been approved. Will receive funding on 6.3.16
Rotary Club of Rolling Meadows	PURSUIT	\$1,000.00	\$600	SLSF requested funding to purchase items for the Sensory Room 5.2.2016. Will receive funding for PURSUIT program on 6.13.2016
The Charitable Foundation for the Rotary Club of Schaumburg-Hoffman Estates	Transportation	\$ 59,493.30	\$30,000	SLSF requested funds to help purchase a 14 passenger/6 wheelchair accessible vehicle on 2.25.2016. It was voted to award SLSF \$30,000 to help with the purchase of an accessible vehicle.
Women's Club of Inverness	General Program Support	\$ 674.50	\$600	SLSF requested funding to purchase adaptive equipment for swimming lessons on 3.7.2016. Received funding on 6.6.2016
Rotary Club of Arlington Heights	Sensory Room	\$1,479.00	\$1,479	SLSF requested funding to help purchase the Maxi Bubble Tube for the sensory room on 4.18.2016. Will receive check week of 6.20.2016

Board Report - Grant Activity for 2016

The following is a list of 2016 grant activity on behalf of SLSF/NWSRA

Schneider Electric North America Foundation	Sensory Room	\$10,000.00	\$10,000	SLSF requested funding to help with the purchase of items for the Sensory Room on 5.5.2016. Received check on 6.17.2016
Rotary Club of Buffalo Grove	Sensory Room	\$2,500.00	\$500	SLSF requested funding to help purchase of items needed for the Sensory Room 5.25.2016
ESPN Grant	General Program Support	\$10,000.00	\$10,000	SLSF request funds to help with general program support of NWSRA programs. 8.15.2016. Received check on 10/5/2016
Palatine Jaycees	General Program Support	\$ 518.63	\$520	SLSF requested funding to purchase cooking equipment needed for programs and leisure ed on 3.18.2016 . Check received on 8.29.2016
Astellas USA Foundation	Sensory Room	\$10,000.00	\$10,000	<u>GRANT STATION</u> - SLSF requested funding to assist with the Sensory Room on 6.16.2016 . Received approval on 9.1.2016
Philoptocus Society of St. Nectarious	General Program Support	\$500.00	\$513	SLSF requested funds to help purchase necessary equipment for NWSRA programs.

Board Report - Grant Activity for 2016

The following is a list of 2016 grant activity on behalf of SLSF/NWSRA

PDRMA	General Program	\$150.00	\$150	SLSF requested funds to help purchase a changing table for PURSUIT on 9.6.2016. Received approval on 11.17.2016
UPS Foundation	PURSUIT 2	\$10,275.87	\$5,000	SLSF requested funds to help purchase necessary technological equipment for PURSUIT 2 on 11.7.2016. Will receive check on 12.14.2016

Proposed Amount from Private Grant Money	\$172,996.99
Approved Grant Money in 2016	\$105,106
Private Grant Money Received in 2016	\$ 104,816.02
2016 Budget	\$ 83,000.00

2015 Elk Grove Township Grant - 3 payments in 2016 = \$3,333.36

To: Tracey M. Crawford, President

From: Nanette Sowa, Superintendent of Development

Date: January

Re: 2017 Sponsor Progress Report through January

Sponsorships are confirmed in the following categories:

1 Opportunity Partner -NCH (\$5000 Gold sponsor for GMFS and CA Gala)	\$10,000
Event Sponsors Unrestricted	\$1,950
Event Sponsor Restricted	
Total	\$11,950

Sponsor Program

Sponsorships secured:

- Northwest Community Healthcare - \$10,000 Opportunity Partner – sponsor benefits for Gold Medal Fashion Show- \$5,000, Celebrate Ability Gala -\$5,000
- Wintrust Mortgage \$250 Photography sponsor-Wintrust Mortgage, \$600 Stage Sponsor-Complete Building Maintenance, \$600 Runway Sponsor -Jen Ubert and Lori Anderson,\$500 Sign Sponsor –LaVelle Law for the Gold Medal Fashion Show

In-kind:

Formally Modern Tuxedos, Bachrach Woodfield, Dress Barn-Schaumburg, Dick Wilson and Forbici Salon are in-kind sponsors of the Gold Medal Fashion Show.

Cornerstones Three cornerstones recognized as essential to SLSF's continued success reviewed during strategic planning years.	Focus/Long-Term Goals The area of focus under each corner stone. These are broad ideas that are developed every 3 – 5 yrs. during strategic planning.	Short-Term Goals What we need to do to address our long term goals, annually, under each focus/long term goal.	Measurable Objective The measurable actions that will tell us that we are succeeding.	Status The progress report for each objective.
Fundraising	Fundraising			
<u>Goals completed by:</u> Nanette Cathy Tracey	Ensure maintenance of current fundraising levels through implementation of targeted, effective fundraising efforts	<ul style="list-style-type: none"> Continue to provide a calendar of quality fundraising events Seek out additional sponsors by attending networking events and area chamber of commerce events. Maintain current grant timeline. Research and apply for new grants that support the goals of the foundation. Identify new, smaller sponsorship opportunities for targeted NWSRA events 	<ul style="list-style-type: none"> Provide at least 8 fundraising events Contact 5 new potential sponsors Apply for at least 90% of previous year's grants 	<ul style="list-style-type: none"> SLSF has confirmed 8 events for the 2016 year. They are listed on the calendar and each has a committee and venue in place. Nanette has contacted, met with and receive a sponsorship from Window Works, a first time SLSF sponsor. Cathy has applied for \$172,996.99 In grant money, \$100,106 has been promised, \$98,658.19 has been received

		<ul style="list-style-type: none"> • Continue to offer current third party events and foster new relationships that may lead to additional third party events • Research and contact companies within the 17 park district area that can be enlisted as SLSF partners • Create and promote an individual giving opportunity that allows for small monthly gifts given automatically through an online processor. • SLSF will seek donors/grants/sponsors to fund the creation of an updated sensory room at the RMCC program space. • If adequate funds are not received by June, the Sensory Room will be the focus of the Gala's Impact Auction 	<ul style="list-style-type: none"> • Research and apply for two new grants • Identify 3 new sponsorship opportunities for targeted NWSRA events • Offer 2 third party events 	<ul style="list-style-type: none"> • A grant requesting funding for a new vehicle was requested from to the Rotary Foundation of Sch/Hoff. Estates and \$30,000 was received • At the request of SLSF Board Member Jonathan Salk, SLSF spoke with with ESPN about a grant. \$10,000 was received <p>Nanette has reached out to 3 lapsed donors for sponsorship. One then sponsored a sign at the AHGC</p>
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			<ul style="list-style-type: none"> • Research and contact 3 companies within the 17 park district area • Create and promote one individual giving opportunity with monthly gift option • Find 5 potential donors/grants/sponsors for the sensory room • Place focus on Sensory Room at the Celebrate Ability Gala Impact Auction 	<ul style="list-style-type: none"> • Nanette has requested the Schaumburg Professional Firefighters to sponsor the NWSRA block party • No third party events were accomplished <p>The Windy City Bulls have started a relationship with SLSF. HSBC has moved into Arlington Heights and a contact has been made.</p> <ul style="list-style-type: none"> • Nanette is reaching out to 10 new/lapsed companies as sponsors for the Snoezelen room
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				<ul style="list-style-type: none"> The Rotary Club of Arlington Heights gave a first time grant for the SNOEZELEN room The Gala committee has agreed to use the Sensory room as the Impact Auction beneficiary if the funds are not yet received in full. However, the emphasis was changed to PURSUIT 2 equipment. \$20812.50 was raised.
Marketing and Technology				
Goals Completed by: Brian Janet Tracey Nanette Cathy	Marketing & Technology Build brand awareness in the community and with potential partners	<ul style="list-style-type: none"> Use the SLSF name/logo on all communications 	<ul style="list-style-type: none"> Publish the SLSF name/logo in at least 5 print communications and 5 online outlets 	<ul style="list-style-type: none"> SLSF name/logo has been published in over 25 print communication materials and over 10 online sites.

	Ensure functionality and enhance efficiency of SLSF donations and event registration systems through effective IT solutions.	<ul style="list-style-type: none"> 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. SLSF will order giveaways with the SLSF logo that we will hand deliver to existing sponsors and new contacts. The giveaway will also be used as volunteer gifts. Publicize and maintain the new SLSF website accessible from the NWSRA website 	<ul style="list-style-type: none"> Send the SLSF Impact bi-monthly Order and deliver 20 giveaways Complete implementation of new site and publicize through 5 outlets 	<ul style="list-style-type: none"> The SLSF Impact is being sent and now includes a new education corner. Mugs with the SLSF logo have been purchased. A thank you card has been created and NS will begin scheduling appointments to meet with sponsors to deliver them New site has been implemented and publicized in a wide variety of outlets through the SLSF.me campaign. SLSF.me Ambassador materials site created for Board members to have access to materials.
Community Relations				
Goals Completed by: Nanette	Community Relations			

SLSF 2016 Foundation Goals

Cathy Tracey	<ul style="list-style-type: none"> • Increase the SLSF identity in the communities served by NWSRA 	<ul style="list-style-type: none"> • 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. • Partner with an outside firm to promote SLSF as a targeted charity beneficiary. • Nominate volunteers for service awards (IPRA, Kevin T. Kendrigan Spirit Award and other community awards). • SLSF staff members will join or maintain memberships in local service clubs and chambers of commerce 	<ul style="list-style-type: none"> • Identify 3 young professionals and community members • Partner with 1 outside firm to promote SLSF as a targeted charity beneficiary. • Nominate at least 2 volunteers for service awards • Join or maintain memberships in at least 2 local service clubs or chamber of commerce 	<ul style="list-style-type: none"> • Zurich NA was nominated for the Sch. Vol of the Year • Large Business. They did not win, but continue to be a supporter of SLSF via money and volunteers. • TC is a member of the Rotary Club of Roll. Mdws. NS is a member of the Rotary Club of Sch/HE • SLSF is a member of both the Arl. Hts. and the Roll. Mdws. Chambers.
Goals Completed by: Nanette Cathy	Community Relations			

Tracey	Strengthen SLSF Board Member commitment	<ul style="list-style-type: none"> • Discern reasons for Board Members sitting on the board, their individual skills and how to make those skills work on the board. • Enable the SLSF staff to respond to the requests made by board members • Identify current Board Member levels of commitment and promote further opportunities • Identify and reach out to members of the community who would be effective SLSF board members • Encourage SLSF Board Members to maintain or increase their personal commitment to the viability of SLSF. 	<ul style="list-style-type: none"> • Meet with each non park district director board member at least once during 2016 • Maintain a spreadsheet of the board member responses from the individual meetings • Create an individualized Board Member giving analysis to create an annual commitment plan • Identify and reach out 1 community member for board membership. • Host discussions with Board Members on maintaining or increasing their personal commitment at individual Board Member meetings. 	<ul style="list-style-type: none"> • In 2016 NS has met with all board members. • The spreadsheet has been created and is filled in after each board member meeting. • NS has created a spreadsheet of each board member's giving in 2015 and has one for 2016. • A Fundraising for Board Members webinar was offered to all SLSF board members in March. A conference call follow-up meeting was held. The information learned will be shared at board
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				meetings and in the monthly SLSF Board member updates.
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MEMO

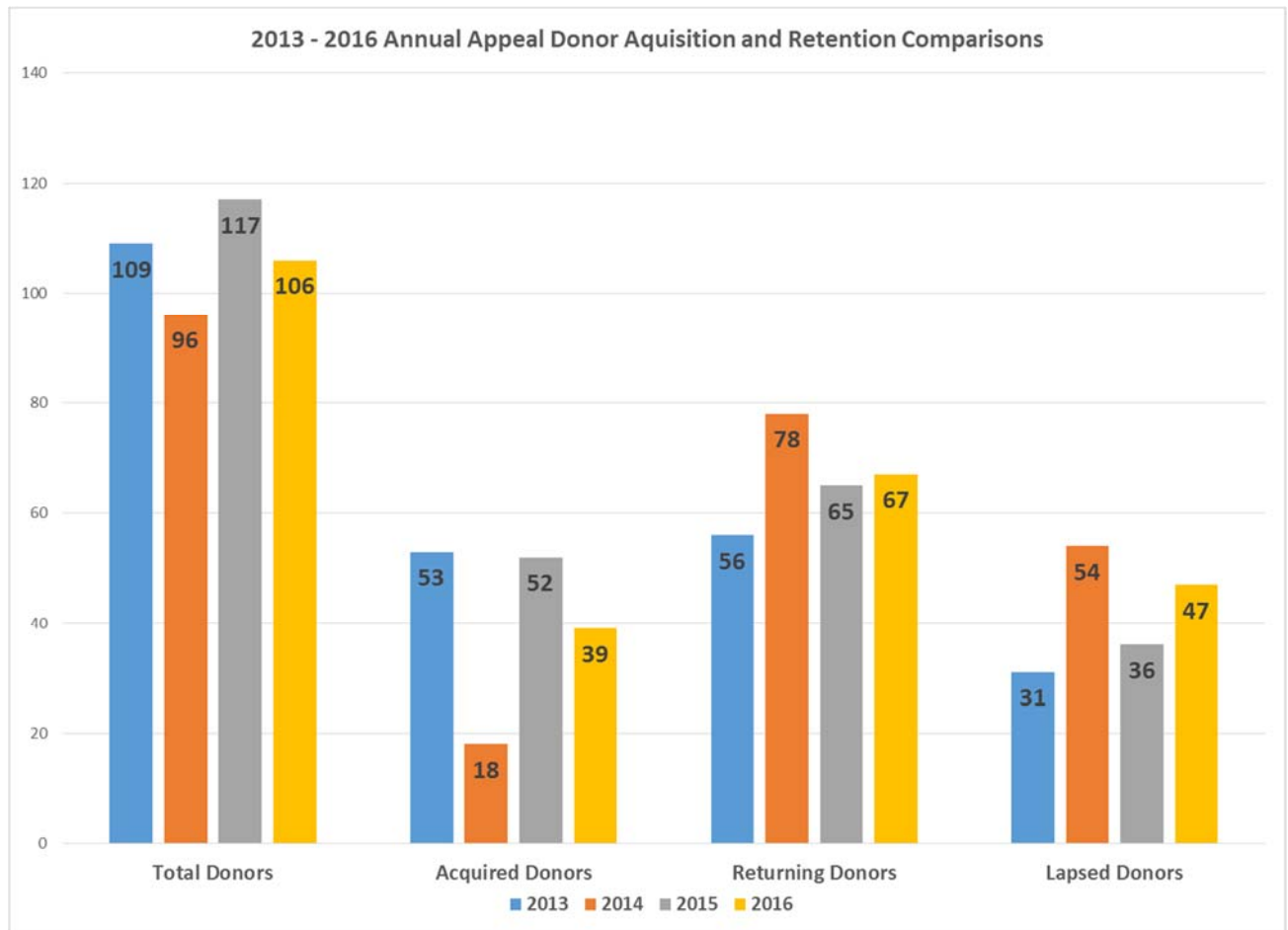
To: Tracey Crawford, SLSF President
From: Cathy Splett, SLSF Foundation Coordinator
Date: 1/4/2017
RE: 2016 Annual Appeal Fund

The 2016 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 2015 and 2016 Annual Appeals.

Description	2015	2016	Change from 2015 - 2016
Amount Received	\$ 25,155.60	\$ 25,620.75	\$ 465.15
Number of Responses	117	106	-11
Response Rate			
Total Number Mailed	2,735	3,525	790
% Response	4.3%	3.0%	-1%
Average Gift	\$ 215.00	\$ 241.71	\$ 26.71
Costs			
Total Actual Expenses	\$ 1,896.02	\$ 2,133.00	\$ 236.98
Cost per donor	\$ 16.20	\$ 20.12	\$ 3.92
Cost per dollar raised	\$ 0.11	\$ 0.09	\$ (0.02)
Net Amount Raised	\$ 23,259.58	\$ 23,487.75	\$ 228.17

Numbers as of 1/4/2017

Below is a graph of SLSF Annual Appeal donor acquisition and retention numbers.



Acquired Donors = New Donors

Returning Donors = Donors who continue to give from previous fiscal year to current fiscal year

Lapsed Donors = Donors who gave the previous fiscal year (i.e. 2015), but not the following fiscal year (i.e. 2016).

To: Tracey Crawford, Executive Director
SLSF Board Meeting
From: Jayne Finger, Superintendent
Date: January 10, 2017
Re: 2016 Scholarship Report

A total amount of \$73,783.00 was awarded in scholarships in 2016. 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 17th.

Below are the amounts awarded by program category and season:

Day Camp = \$46,420

Winter/Spring Weekly Programs = \$7,831.50

Summer Weekly Programs = \$3,435.75

Fall Weekly Programs = \$8305.75

Leisure Education = \$7790

To: Tracey Crawford, Executive Director
From: Brian Selders, Superintendent of Communications & IT
Re: NWSRA/SLSF Marketing and Public Relations Report
Date: January 6, 2017

Following is a synopsis of marketing activities that have taken place in 2016:

MEDIA	
Daily Herald	<ul style="list-style-type: none"> • Article on Astellas USA Foundation • Article on PURSUIT 2 • Article on Celebrate Ability Gala • Article on Tracey Crawford- AAPRA • Article on Terrazzo & Marble Supply Companies outing • Article on American Legion/NWSRA Summer Classic partnership • Birds of a Feather ad posted • SLSF Buffalo Grove, Palatine Hills, Moretti's/NWSRA and Women's Outing articles • Joint SRA ad in Autism Awareness Section • Snoezelen Room article • Article on State Ice Skating competition with NWSRA athletes highlighted • Appreciation ad sent for: <ul style="list-style-type: none"> - Gold Medal Fashion Show - Buffalo Grove Golf Classic - Palatine Hills Golf Classic - Moretti's/NWSRA Golf Classic - Women's Golf Outing • Added GMFS and Spring Golf Outings to online calendar of events through Spingo • Full page co-op ad with SRANI in the Autism Awareness section of Daily Herald • Article on NWSRA piano lessons by Eileen O'Daday • Gold Medal Fashion Show article
Chicago Tribune	<ul style="list-style-type: none"> • Article on NWSRA Distinguished Accreditation • Article on Astellas USA Foundation • Article on PURSUIT 2 • Article on Tracey Crawford- AAPRA • Celebrate Ability Gala article • Terrazzo & Marble Supply Companies article • Article on Snoezelen room implementation • American Legion/NWSRA Summer Classic Article

TribLocal/ Metromix	<ul style="list-style-type: none"> Added all SLSF events to online calendar of events
Daily Herald Business Ledger	<ul style="list-style-type: none"> Submitted SLSF information for the Business Ledger Philanthropy Guide
Patch	<ul style="list-style-type: none"> Article on Gold Medal Fashion Show posted
Oaklee's Guide	<ul style="list-style-type: none"> Summer Day Camp added to events listing
Miscellaneous	<ul style="list-style-type: none"> SLSF events posted online to the following sites: Daily Herald, WGN TV, Chicago Mama, Chicago Music Guide, North Shore Breaking News
ONLINE	
NWSRA/SLSF Online	<ul style="list-style-type: none"> Snoezelen Ribbon Cutting promoted Revamped Part Time staff application system with online platform to RSVP for interview nights, auto-reply e-mails, exportable reports, social sharing and more. Updated PURSUIT web page with online article and new format NWSRA Strategic Planning web page created and shared Website link sharing with Autism Home Support Services Set up NWSRA profile on JJ's List Set up NWSRA profile on Autism Village Created online SLSF.me Ambassador materials order form Added individual SLSF Facebook event pages Utilized Eventful for SLSF event marketing Day Camp flyer posted on School District virtual backpacks throughout NWSRA service area Web link exchange set up with Special Needs Chicago Joined Aspiritech resource database for adult autism community Added FOIA and Transparency information Updated 2016 information across main site pages Updated links throughout Directors sites, main site, ADA site and PDMarketing site 2016 SLSF events posted online Bi-monthly NWSRA Now and SLSF Impact e-newsletters sent Monthly NWSRA and SLSF Board Update e-newsletters sent
Social Media	<ul style="list-style-type: none"> 2016 recap of accomplishments video posted on Youtube

	<ul style="list-style-type: none"> • New videos created for Celebrate Ability Gala, Snoezelen Room and Holiday Luncheon • NWSRA now has over 2,500 Facebook followers • Shared PURSUIT 2 information across all platforms • Created and shared online seasonal programming survey • Partnered with CDGA Foundation on celebrity golf event- NWSRA golfers partnered with local news celebrities • Birds of a Feather campaign implemented for hiring • Won the 2015 Constant Contact All Star Award- only top 10% of organizations receive this award. NWSRA has now won 4 years in a row. • Snoezelen room web page with donations capability created and shared • Google clicks to NWSRA website increased 18% from October-December
PUBLICATIONS and FLYERS	
NWSRA/ SLSF	<ul style="list-style-type: none"> • SLSF Holiday Appeal sent • Created Snoezelen Ribbon Cutting invitation with online RSVP • Updated PURSUIT brochure with 2nd location • Created and sent Holiday Luncheon invitation • New postcards created to distribute at 3rd party events • Created Snoezelen banners- placed in programming space • Ad placed in Partners in Adult Learning (PAL) fundraiser program book • SLSF Spring Appeal sent • Ad placed in Chicago Special Parent magazine • Ad placed in Rotary Club of Rolling Meadows fundraiser event menu • Winter/Spring and Summer 2016 brochures sent and online • 2015 Annual Report sent • Gold Medal Fashion Show invitations and program books created and sent • Created SLSF.me general information Powerpoint • Created recap Powerpoint presentation of 2015 accomplishments and presented to Board and staff • Created 2016 calendar of events and posted online

Television, Video and Radio	
NWSRA/SLSF	<ul style="list-style-type: none"> • PURSUIT interview on Schaumburg WSPD-TV • Created new series of “What’s Your Why?” videos • Videos created for SLSF Gold Medal Fashion Show, Buffalo Grove Golf Classic, Palatine Hills Golf Classic, Moretti’s/NWSRA Golf Classic and Women’s Golf Outing • NWSRA staff interviewed on Schaumburg Park District TV channel in February on inclusion • SLSF event slides played on Village of Palatine Channel 6 message board • Updated 12 minute NWSRA promotional video • Updated NWSRA Policies and Procedures video to include Closed Captioning • SLSF event video created • A series of 30 second commercials about NWSRA is now being played on the Village of Hoffman Estates, Village of Mount Prospect and Schaumburg Park District local television stations.
ADDITIONAL MARKETING	
NWSRA/SLSF	<ul style="list-style-type: none"> • Submitted Agency Showcase nominations to IPRA • Submitted nominations for Broadway Buddies, Safety for Yourself, Clearbrook and Stephen Katz for ITRS Awards • New expo bin created with new displays and giveaways • Article featured NWSRA in PDRMA safety newsletter on fleet management • Partnered with SRA’s to join Clearbrook Home Based Services Expo • Staff training provided on marketing NWSRA as a leading employer • Birds of a feather bus magnets, posters, feather banners, window clings posted • Nominated Zurich NA for Village of Schaumburg Volunteer Organization of the Year • VOIP Phone System installed with professional production of bilingual on hold messages directing to website/social media • Wrote new Information Systems Policies section for NWSRA Policy Manual • Submitted pieces into IPRA Agency Showcase • Created and sent survey for Park District marketing contacts for information on 2016 events to promote NWSRA

	<ul style="list-style-type: none"> • Hosted departmental database meetings to review the building of the database and website and begin training • Installed conferencing and presentation capability in 1st floor Conference Room
Expos/Networking Events Attended	
NWSRA/SLSF	<ul style="list-style-type: none"> • Calendar of expos/networking events attended created by Outreach Committee. Attended 35 events in 2016 • Park District marketing website updated with increased access to ads, photos, writeups, online calendar and more.
IN PROGRESS	
NWSRA/SLSF	<ul style="list-style-type: none"> • Database/website build project • Various publications and online media

To: Tracey Crawford, Executive Director
From: Jayne Finger and Andrea Griffin, Superintendents of Recreation
Re: Program Report, November 11, 2016 – January 9, 2017

Program Highlights

Weekly Programs

NWSRA's Competitive Cheer program was a big success this fall. The group created and learned their cheers during the fall session, then attended an NWSRA Co-Rec basketball game to perform their cheers and motivate the team. The session wrapped up with a cheer competition in Aurora on December 18.

Fall Programs ended on Saturday December 3, and NWSRA is busy preparing for Winter Spring which will start Monday February 13. As of January 4 there are 680 registrations with 143 program choices offered.

We're very excited about some of the new program offerings for the Winter/Spring session. A new array of preschool offerings to stimulate academics through games and crafts are being offered. Individualized sensory therapy sessions will be offered in the Snoozelen Room. Recess Games will be offered to youth to help them feel more comfortable while joining their peers on the playground. Wii Mania, offered to teens and young adults, will be offered at the Rolling Meadows Community Center. Saturday Afternoon Hangout for teens and adults will introduce yoga and relaxation techniques. Get Tech Smart is offered to adults with an interest in learning about the latest technology and some new resources. Recipe for a Healthier You is a stress management program taught cooperatively with certified nurses, and Aktion Club a community service program for adults and is sponsored by the Rolling Meadows Kiwanis Club.

Leisure Education

Fall registrations reflected a 7.22% increase in registrations from 2015 to 2016. Teachers who had classes involved in leisure education selected activities that would provide new experiences and challenge their students. This included nature activities and animal handling at the Bartlett Nature Center, ice skating at Nelson Sports Complex in Rolling Meadows, tumbling at Gary Morava Recreation Center in Prospect Heights, swimming at Schaumburg CRC, archery at The Zone at the River Trails Park District and wall climbing at Prairie Stone in Hoffman Estates.

Special Events

NWSRA celebrated a breakthrough in therapy for individuals in the northwest suburbs. Through the collaborative efforts of grantors, donors, volunteers and staff the NWSRA Snoezelen Sensory room is complete! SLSF hosted the Ribbon Cutting Ceremony for the Snoezelen sensory room on Wednesday, December 7 from 4:00-6:00 p.m. at the NWSRA programming space. The Snoezelen Sensory Room will provide rare opportunities for stimulation, interaction and therapy for individuals in the northwest suburbs. It will aide in helping to break down the illusions of fear, the walls of anxiety and the floods of panic for so many individuals. The room will open worlds of possibilities for individual's disabilities ranging from autism to developmental disabilities to dementia and more.

NWSRA Lightning Sports Teams

All eyes were on NWSRA Lightning Floor Hockey athletes on Saturday, November 12 at the Special Olympics State Floor Hockey Tournament at Northeastern Illinois University in Chicago. Three NWSRA athletes were selected to participate in the Special Olympics Opening Ceremonies at the event. Ela S. from Wheeling led all the athletes competing that day from across the state in the Special Olympics Oath. Eric F. from Elk Grove Village and Sara L. from Mount Prospect had the honor of passing the "Flame of Hope" to one another to kick off the State Floor Hockey Games.

The NWSRA Lightning Floor Hockey team competed in two games this day and brought home a Silver Medal! Congratulations to Ela, Eric, Sara and all the rest of the NWSRA team for a great finish to the season

Inclusion

On Thursday, December 1, Rachel Hubsch, Manager of Inclusion Services, and Katrina Place, Inclusion Coordinator, attended Schaumburg Park District's KASPER site director meeting. Rachel and Katrina provided a site director training on inclusion services, a topic that was added to the training offerings in 2016. The agenda included information on the inclusion process, expectations of inclusion aides, park district staff and site directors. The inclusion team received positive feedback and new ideas for other trainings.

In 2016, NWSRA and member park districts supported 2,108 registrations. Of those registrations, 124 individuals utilized inclusion services for the first time. One of the parents at the Palatine Park District commented on an evaluation form stating, "My son benefited from the social interaction and having his aide support him in learning/practicing problem solving, dealing with and working through frustrations (self-regulation skills) and in following directions in a recreation setting."

Due to the growth of inclusion registrations from 2015 to 2016, the inclusion team increased the amount of site visits to help support residents within each member park district who receive inclusion assistance. During site visits, each Inclusion Coordinator provided on-site training to inclusion aides and park district staff on proactive strategies to manage challenging behaviors, develop goals and reevaluate behavior plans already in place.

	2015	2016
Fall Registrations	395	389
Year End Registrations	2009	2108
Individual Participants (year)	402	440
Individual Staff (year)	423	322
Site Visits (year)	387 hours	439 hours
New Participants	83	124

Collaborative Opportunities

The PURSUIT Adult Day Program

PURSUIT continues to be at maximum capacity, 20 clients a day, with a growing interest list. From November to January there has been 40 tours given to approximately 100 school personnel and families as more potential clients will age out of school in 2017. With the excitement of PURSUIT Hanover Park the amount of tours have increased.

On Tuesday, November 15 some clients from the PURSUIT program helped lead the RMPD C.A.R.E Kindergarten class. PURSUIT developed and practiced a lesson plan ahead of time. PURSUIT clients read the book, taught sign language to go with the book and led a craft. The event was a great success and PURSUIT will be partnering with this group once a month for story time.

On Wednesday, November 16 Liz Thomas, the Adult Day Program Coordinator attended the Hanover Park Business Showcase. The event was a great place to network for the new PURSUIT program in Hanover Park. Liz made multiple community contacts and has already been in contact with a few volunteer sites for potential volunteer recruitment.

PURSUIT clients continue to participate in community service projects with many different organizations is still a primary focus in PURSUIT. In 2015 PURSUIT volunteered a total of 791 hours. In 2016 PURSUIT volunteered a total of 1187 hours!

Healthy Minds/Healthy Bodies (HMHB)

On November 16, three veterans and their wives experienced a William B. Fosser's Puppet Production of the beloved children's classic Hansel and Gretel. A demonstration of the operation of the puppets and a tour of the highly technical backstage area followed the performance. Dinner at Sam's of Arlington followed, where everyone laughed and told stories about their service. The first annual Holiday Party took place on Friday, December 9 at Arlington Lakes Golf Club Banquet Room. Four Veterans and each of their wives participated in the white elephant exchange that left Bill K. from Palatine the lucky winner of deck of 52 pickup lines.

Since January, 2016, a total of 22 veterans have joined the HMHB program at three member park district including Bartlett, Palatine and Buffalo Grove. Nine have joined Palatine, twelve have joined Bartlett and one has joined Buffalo Grove. Buffalo Grove joined the program in October.

Of the 22 who have joined, 19 veterans have put in 335 hours at the fitness centers. This includes 117 personal training sessions. There has been an increase in participation at the social component of the program which is due, in part, to consistent leadership in the recreation component of the program and an increase of marketing through social media and recruiting through phone calls. The social activities had 21 registrations this year.

Staff Update

Part-Time Staff & Volunteers

The Winter Spring trainings for Program Leaders and assistants will be held on Monday, January 30 and Wednesday, February 1. During these trainings, the focus will be on supporting program leaders, payroll training, and policy and procedure review and behavior management.

A highlight from volunteers is the support provided by two specific groups; the Interact Club from Buffalo Grove High School and the Best Buddies program at Rolling Meadows High School. They have provided approximately ten volunteers this fall, and provided consistency that is vital to programs and participants.

- 125 volunteers donated their time and talent toward making NWSRA Weekly Programs, Special Events and Social Clubs an outstanding success
- 17 Social Clubs received support from one or more volunteers
- 5 winter break camps received support from one or more volunteers.
- 28 Clubs received support from one or more members of Volunteer team
- 68 Weekly Programs received support from one or more members of Volunteer team
- 12 Lighting events received support from one or more members of Volunteer team

Recruitment & Outreach

NWSRA has hired four staff in November and five staff in December for a total of nine staff, six joining the inclusion team and three joining weekly programs. Since November NWSRA has attended the following:

- Schaumburg District 54 Resource Fair: Over 100 teachers, therapists, and support staff were in attendance. At least 40 took outreach materials and approximately 10 took recruitment materials.
- Harper College: Presented to 14 students in the human services field and provided information about Therapeutic Recreation, employment and volunteer opportunities.

The Support Services Department continues to work with partnering communities posting over 80 flyers at local community establishments such as Starbucks, libraries, and grocery stores. The Recruitment Coordinator continues to develop her relationships at local High Schools and has

spoken at Buffalo Grove High School Interact Club. She is working with Hoffman Estates High School and Rolling Meadows High School Best Buddies Program coordinators and teachers to assist with recruitment efforts for NWSRA.

Interns

NWSRA is hosting an intern in occupational therapy for 16 weeks during the winter/spring program session. Risa Umeno is a in the Doctoral Occupational Therapy Program at Huntington University, located in Fort Wayne, IN. Risa will be working primarily in the PURSUIT 1 program and assisting at a cooking program on Thursdays. She will be applying occupational therapy principles to the programs at NWSRA. We look forward to working with another therapist and applying their knowledge and experience to the therapeutic recreation model.

Staff Development and Training

On November 14 – 15, three full time staff members, Nicole Estrada, Manny Aguilar and Trisha Palmieri attended the Illinois Recreational Therapy Association Annual Conference in Alsip, Illinois. This conference focuses on therapeutic recreation practices, techniques and models. The agency makes this opportunity available to those staff that have acquired their certification through the National Council for Therapeutic Recreation Certification (NCTRC).

During the December In-Service Week, 16 staff and three part time staff were certified in Red Cross Lifeguarding. The week-long class was held at the Schaumburg CRC. NWSRA staff with lifeguarding certification are utilized during the summer months at NWSRA's summer day camp held at Sunrise Lake Outdoor Education Center and Camp Connections held at Kirk School. In addition, lifeguards are needed at some leisure education programs that may include paddle boating or row boating and when trips are taken and the group goes swimming in hotel pools.

On December 16 all staff attended a one-hour training on Ergonomics, Patron Transfers and Back Safety, led by NWSRA's Safety Committee. Staff attended stations where proper lifting, transferring and performing wheel-chair tie downs were practiced. This particular training is offered annually to full time staff and also covered at training for seasonal staff.

Trainings in January include CPR certification and challenges, behavior management and CPI training and Red Cross First Aid refresher and challenge. Twenty-eight staff will be attending the IAPD/IPRA Soaring to New Heights State Conference.

Behavior Team

Throughout the months of November and December, the Behavior Team received three formal requests for support with specific participants. The Behavior Team conducted five onsite program observations and four in-house trainings for staff who work directly with the aforementioned identified participants. Andrea Griffin, Superintendent of Recreation and Ted Adatto, Inclusion Coordinator, conducted a school-based observation of a participant at Giant Steps (a school created specifically for students on the autism spectrum) in Lisle. The Behavior Team conducted individual consultations with staff coordinating winter break camps to proactively address anticipated behavior challenges, assist with creating optimal staff/participant groupings, and create written participant documents to brief part-time staff. In addition to individual meetings, the Behavior Team created command ring visuals (small, pictorial representations of common directions such as: "stop," "stand up," etc.) for all staff working winter break programs to diversify communication methods with participants.

VII. Review of Financial Statements

**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

**Your Financial Consultant:**

HANSON / FISHER / VANDERLUGT

(630) 871-2673

Account Number: EBR-112070**Statement Period: 10/01/2016 - 10/31/2016****Portfolio at a Glance**

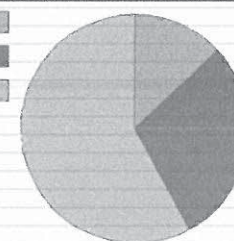
	This Period	Year-to-Date
Beginning Account Value	\$1,357,901.63	\$1,281,204.01
Deposits (Cash & Securities)	0.00	17,000.00
Dividends, Interest and Other Income	253.90	17,831.98
Net Change in Portfolio	-10,933.65	31,185.89
Ending Account Value	\$1,347,221.88	\$1,347,221.88
Estimated Annual Income	\$16,762.86	

Asset Summary

	Prior Year-End	Last Period	This Period	% Allocation
Cash, Money Funds, and Bank Deposits ¹	117,118.04	174,835.79	170,089.69	13%
Fixed Income	421,289.85	391,525.35	396,199.10	29%
Mutual Funds	742,796.12	791,540.49	780,933.09	58%
Account Total (Pie Chart)	\$1,281,204.01	\$1,357,901.63	\$1,347,221.88	100%

¹ 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.



Please review your allocation periodically with your Financial Consultant.



**BENJAMIN F. EDWARDS & CO.**INVESTMENTS *for* GENERATIONS

One North Brentwood Blvd., Suite 850

Saint Louis, MO 63105

314-726-1600

* 00061037 02 AV 0.373 02 TR 00275 X107PD06 000000

**SPECIAL LEISURE SERVICES
FOUNDATION**

ATTN TRACEY CRAWFORD

3000 CENTRAL RD STE 205

ROLLING MDWS IL 60008-2551

**Your Financial Consultant:**

HANSON / FISHER / VANDERLUGT

(630) 871-2673

Account Number: EBR-112070**Statement Period: 11/01/2016 - 11/30/2016****Portfolio at a Glance**

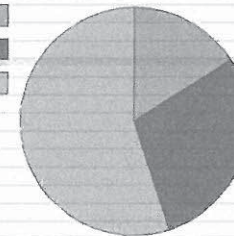
	This Period	Year-to-Date
Beginning Account Value	\$1,347,221.88	\$1,281,204.01
Deposits (Cash & Securities)	0.00	17,000.00
Dividends, Interest and Other Income	19.26	17,851.24
Net Change in Portfolio	14,373.19	45,559.08
Ending Account Value	\$1,361,614.33	\$1,361,614.33
Estimated Annual Income	\$16,782.12	

Asset Summary

	Prior Year-End	Last Period	This Period	% Allocation
Cash, Money Funds, and Bank Deposits ¹	117,118.04	170,089.69	220,102.45	16%
Fixed Income	421,289.85	396,199.10	394,719.20	29%
Mutual Funds	742,796.12	780,933.09	746,792.68	55%
Account Total (Pie Chart)	\$1,281,204.01	\$1,347,221.88	\$1,361,614.33	100%

¹ 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.



Please review your allocation periodically with your Financial Consultant.





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

* 00006651 03 AT 0.646 03 TR 00055 X220PA02 110000

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



Your Financial Consultant:
 HANSON / FISHER / VANDERLUGT
 (630) 871-2673

Account Number: EBR-112070
Statement Period: 12/01/2016 - 12/31/2016

Portfolio at a Glance

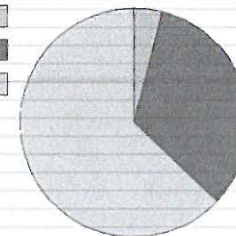
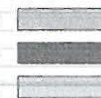
	This Period	Year-to-Date
Beginning Account Value	\$1,361,614.33	\$1,281,204.01
Deposits (Cash & Securities)	0.00	17,000.00
Withdrawals (Cash & Securities)	-171,547.00	-171,547.00
Dividends, Interest and Other Income	23,078.76	40,930.00
Net Change in Portfolio	-16,048.51	29,510.57
Ending Account Value	\$1,197,097.58	\$1,197,097.58
Estimated Annual Income	\$17,017.07	

Asset Summary

	Prior Year-End	Last Period	This Period	% Allocation
Cash, Money Funds, and Bank Deposits ¹	117,118.04	220,102.45	49,732.24	4%
Fixed Income	421,289.85	394,719.20	391,337.10	33%
Mutual Funds	742,796.12	746,792.68	756,028.24	63%
Account Total (Pie Chart)	\$1,281,204.01	\$1,361,614.33	\$1,197,097.58	100%

¹ 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.



Please review your allocation periodically with your Financial Consultant.



NORTHWEST SPECIAL RECREATION ASSOCIATION
SPECIAL LEISURE SERVICES FOUNDATION

ORGANIZATIONAL CASH OVERVIEW OCTOBER 31, 2016

		<u>NWSRA</u>	<u>SLSF</u>	<u>TOTAL</u>
<u>WORKING CASH</u>				
	PETTY CASH	\$ 500	\$ 150	\$ 650
	IMPREST/DONORSHARE (Harris Bank)	16,566	476	17,042
	MMKT/BAC (Harris Bank)	1,561,555	174,833	1,736,388
	PAYROLL (Harris Bank)	148,338		148,338
	IPDLAF	265,608		265,608
	TOTAL	<u>1,992,567</u>	<u>175,459</u>	<u>2,168,026</u>
<u>RESERVES: INVESTMENTS</u>				
	BF EDWARDS		1,282,381	1,282,381
	PFM Asset Management	<u>1,267,169</u>		<u>1,267,169</u>
	TOTAL	<u>1,267,169</u>	<u>1,282,381</u>	<u>2,549,550</u>
<u>RESERVES:</u>				
	<u>OPERATING</u>			
	<u>CAPITAL</u>			
	MAX SAFE 1 (Village Bank & Trust)	1,268,813		1,268,813
	MAX SAFE 2 (Village Bank & Trust)	<u>91,829</u>		<u>91,829</u>
	TOTAL	<u>1,360,643</u>		<u>1,360,643</u>
<u>TOTAL CASH & RESERVES</u>				
	<u>October 31, 2016</u>	<u><u>\$ 4,620,379</u></u>	<u><u>\$ 1,457,840</u></u>	<u><u>\$ 6,078,218</u></u>

<u>TOTAL CASH & RESERVES</u>				
	<u>October 31, 2015</u>			
	CASH	\$ 1,548,559	\$ 188,914	\$ 1,737,473
	RESERVES - OPER	1,000,272		1,000,272
	RESERVES - CAP	140,507		140,507
	RESERVES - INVEST	<u>1,159,626</u>	<u>1,241,188</u>	<u>2,400,814</u>
		<u><u>\$ 3,848,964</u></u>	<u><u>\$ 1,430,102</u></u>	<u><u>\$ 5,279,066</u></u>

SPECIAL LEISURE SERVICES FOUNDATION

BUDGET VS ACTUAL and CASH BALANCE

OCTOBER 31, 2016

(A) BUDGET VS ACTUAL		REVENUE			EXPENSES			EXCESS REVENUE (EXPENSE)		
MONTH	BUDGET	ACTUAL	OVER (UNDER)	BUDGET	ACTUAL	OVER (UNDER)	BUDGET	ACTUAL	OVER (UNDER)	
January	19,982	3,057	(16,925)	4,838	7,643	2,804	15,143	(4,586)	(19,729)	
February	43,499	32,062	(11,437)	14,765	18,299	3,533	28,734	13,763	(14,971)	
March	36,328	57,686	21,358	6,395	688	(5,707)	29,933	56,998	27,065	
April	17,153	36,757	19,604	2,582	7,162	4,579	14,571	29,596	15,025	
May	32,153	70,228	38,075	108,240	114,075	5,835	(76,087)	(43,847)	32,240	
June	30,028	41,076	11,048	8,283	24,036	15,753	21,745	17,040	(4,705)	
July	19,210	38,881	19,671	4,983	12,351	7,368	14,227	26,530	12,303	
August	36,160	52,835	16,675	1,450	4,665	3,215	34,710	48,170	13,460	
September	49,688	78,538	28,850	24,571	14,894	(9,677)	25,117	63,644	38,527	
October	33,516	40,370	6,854	120,015	98,844	(21,172)	(86,499)	(58,474)	28,025	
November	71,166		(71,166)	16,695		(16,695)	54,471	0	(54,471)	
December	32,277		(32,277)	108,284		(108,284)	(76,006)	0	76,006	
TOTAL YTD	317,716	451,489	133,773	296,123	302,655	6,532	21,593	148,834	127,241	

(B) CASH BALANCE		BEGINNING OF	EXCESS REV.	NON-CASH	NON CASH	BALANCE SHEET	END OF
	MONTH	(EXP.) FOR MONTH	REVENUE	EXPENSES	TRANSACTIONS	MONTH	
January	1,390,879	(19,729)			(1,457)	1,369,694	
February	1,369,694	(14,971)			28,734	1,383,457	
March	1,383,457	27,065			29,933	1,440,455	
April	1,440,455	15,025			14,321	1,469,801	
May	1,469,801	32,240			(76,088)	1,425,953	
June	1,425,953	17,040			0	1,442,993	
July	1,442,993	26,530			0	1,469,523	
August	1,469,523	48,170			(2,355)	1,515,338	
September	1,515,338	63,644			0	1,578,982	
October	1,578,982	(58,474)			0	1,520,508	
November	1,520,508					1,520,508	
December	1,520,508					1,520,508	

SPECIAL LEISURE SERVICES FOUNDATION

BUDGET VS ACTUAL - SUMMARY BY TYPE

TEN MONTHS ENDING OCTOBER 31, 2016

	2016			2015
	<u>ACTUAL</u>	<u>BUDGET</u>	<u>OVER (UNDER)</u>	<u>PRIOR YR ACTUAL</u>
<u>REVENUE</u>				
GRANTS	96,343	67,909	28,433	48,882
RESTRICTED FUNDRAISING	56,930	50,103	6,827	57,779
RESTRICTED DONATIONS	2,990	2,958	32	8,131
UNRESTRICTED FUNDRAISING	216,738	172,096	44,642	218,255
UNRESTRICTED DONATIONS	29,386	24,500	4,886	21,073
NET INCOME CARRY OVER	0	0	0	0
TOTAL REVENUE	402,386	317,566	84,820	354,120
<u>EXPENDITURES</u>				
ADMINISTRATION	27,022	24,158	2,864	22,802
RESTRICTED FUNDRAISING	11,219	12,002	(783)	12,060
UNRESTRICTED FUNDRAISING	65,800	69,963	(4,163)	67,986
GRANTS GIVEN	198,614	190,000	8,614	155,448
TOTAL EXPENSES	302,656	296,123	6,533	258,296
<u>OPERATING</u>				
EXCESS REVENUE (EXPENSES)	99,730	21,443	78,287	95,824
<u>INVESTMENT INCOME (LOSS)</u>	49,103	150	48,953	27,694
*				
<u>NET EXCESS REVENUE (EXPENSE)</u>	<u>\$ 148,833</u>	<u>\$ 21,593</u>	<u>\$ 127,241</u>	<u>\$ 123,518</u>

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

NORTHWEST SPECIAL RECREATION ASSOCIATION
SPECIAL LEISURE SERVICES FOUNDATION

ORGANIZATIONAL CASH OVERVIEW NOVEMBER 30, 2016

		<u>NWSRA</u>	<u>SLSF</u>	<u>TOTAL</u>
<u>WORKING CASH</u>				
	PETTY CASH	\$ 500	\$ 150	\$ 650
	IMPREST/DONORSHARE (Harris Bank)	16,937	476	17,413
	MMKT/BAC (Harris Bank)	1,373,532	204,372	1,577,904
	PAYROLL (Harris Bank)	144,292		144,292
	IPDLAF	446,784		446,784
	TOTAL	<u>1,982,044</u>	<u>204,999</u>	<u>2,187,043</u>
<u>RESERVES: INVESTMENTS</u>				
	BF EDWARDS		1,361,614	1,361,614
	PFM Asset Management	<u>1,267,022</u>		<u>1,267,022</u>
	TOTAL	<u>1,267,022</u>	<u>1,361,614</u>	<u>2,628,637</u>
<u>RESERVES:</u>				
	<u>OPERATING</u>			
	<u>CAPITAL</u>			
	MAX SAFE 1 (Village Bank & Trust)	1,268,918		1,268,918
	MAX SAFE 2 (Village Bank & Trust)	<u>91,830</u>		<u>91,830</u>
	TOTAL	<u>1,360,748</u>		<u>1,360,748</u>
<u>TOTAL CASH & RESERVES</u>				
	November 30, 2016	<u><u>\$ 4,609,815</u></u>	<u><u>\$ 1,566,613</u></u>	<u><u>\$ 6,176,427</u></u>

<u>TOTAL CASH & RESERVES</u>				
	November 30, 2015			
	CASH	\$ 2,175,075	\$ 203,064	\$ 2,378,139
	RESERVES - OPER	1,159,488		1,159,488
	RESERVES - CAP	140,508		140,508
	RESERVES - INVEST	<u>1,000,355</u>	<u>1,296,356</u>	<u>2,296,711</u>
		<u><u>\$ 4,475,426</u></u>	<u><u>\$ 1,499,420</u></u>	<u><u>\$ 5,974,846</u></u>

SPECIAL LEISURE SERVICES FOUNDATION

BUDGET VS ACTUAL and CASH BALANCE

NOVEMBER 30, 2016

(A) BUDGET VS ACTUAL		REVENUE			EXPENSES			EXCESS REVENUE (EXPENSE)		
MONTH	BUDGET	ACTUAL	OVER (UNDER)	BUDGET	ACTUAL	OVER (UNDER)	BUDGET	ACTUAL	OVER (UNDER)	
January	19,982	3,057	(16,925)	4,838	7,643	2,804	15,143	(4,586)	(19,729)	
February	43,499	32,062	(11,437)	14,765	18,299	3,533	28,734	13,763	(14,971)	
March	36,328	57,686	21,358	6,395	688	(5,707)	29,933	56,998	27,065	
April	17,153	36,757	19,604	2,582	7,162	4,579	14,571	29,596	15,025	
May	32,153	70,228	38,075	108,240	114,075	5,835	(76,087)	(43,847)	32,240	
June	30,028	41,076	11,048	8,283	24,036	15,753	21,745	17,040	(4,705)	
July	19,210	38,881	19,671	4,983	12,351	7,368	14,227	26,530	12,303	
August	36,160	52,835	16,675	1,450	4,665	3,215	34,710	48,170	13,460	
September	49,688	78,632	28,944	24,571	14,988	(9,583)	25,117	63,644	38,527	
October	33,516	40,384	6,868	120,015	98,858	(21,158)	(86,499)	(58,474)	28,025	
November	71,166	52,464	(18,702)	16,695	25,506	8,810	54,471	26,958	(27,513)	
December	32,277		(32,277)	108,284		(108,284)	(76,006)	0	76,006	
TOTAL YTD		388,882	504,061	115,179	312,818	328,269	15,451	76,063	175,792	99,729

(B) CASH BALANCE		BEGINNING OF	EXCESS REV.	NON-CASH	NON CASH	BALANCE SHEET	END OF
	MONTH	(EXP.) FOR MONTH	REVENUE	EXPENSES	TRANSACTIONS	MONTH	
January	1,390,879	(19,729)			(1,457)	1,369,694	
February	1,369,694	(14,971)			28,734	1,383,457	
March	1,383,457	27,065			29,933	1,440,455	
April	1,440,455	15,025			14,321	1,469,801	
May	1,469,801	32,240			(76,088)	1,425,953	
June	1,425,953	17,040			0	1,442,993	
July	1,442,993	26,530			0	1,469,523	
August	1,469,523	48,170			(2,355)	1,515,338	
September	1,515,338	63,644			0	1,578,982	
October	1,578,982	(58,474)			0	1,520,508	
November	1,520,508	26,958			12,850	1,560,316	
December	1,560,316					1,560,316	

SPECIAL LEISURE SERVICES FOUNDATION

BUDGET VS ACTUAL - SUMMARY BY TYPE

ELEVEN MONTHS ENDING NOVEMBER 30, 2016

	2016			2015
	<u>ACTUAL</u>	<u>BUDGET</u>	<u>OVER (UNDER)</u>	<u>PRIOR YR ACTUAL</u>
<u>REVENUE</u>				
GRANTS	98,658	75,455	23,204	64,715
RESTRICTED FUNDRAISING	56,930	53,175	3,755	57,779
RESTRICTED DONATIONS	2,990	2,958	32	8,131
UNRESTRICTED FUNDRAISING	245,214	232,629	12,585	254,745
UNRESTRICTED DONATIONS	36,766	24,500	12,266	21,995
NET INCOME CARRY OVER	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>
TOTAL REVENUE	440,558	388,717	51,841	407,365
<u>EXPENDITURES</u>				
ADMINISTRATION	28,669	24,788	3,881	23,432
RESTRICTED FUNDRAISING	11,704	12,002	(298)	12,060
UNRESTRICTED FUNDRAISING	88,663	86,028	2,635	83,922
GRANTS GIVEN	<u>199,234</u>	<u>190,000</u>	<u>9,234</u>	<u>155,448</u>
TOTAL EXPENSES	328,270	312,818	15,452	274,862
<u>OPERATING</u>				
EXCESS REVENUE (EXPENSES)	<u>112,287</u>	<u>75,898</u>	<u>36,389</u>	<u>132,503</u>
<u>INVESTMENT INCOME (LOSS)</u>	63,504	165	63,339	30,603
*				
<u>NET EXCESS REVENUE (EXPENSE)</u>	<u>\$ 175,791</u>	<u>\$ 76,063</u>	<u>\$ 99,728</u>	<u>\$ 163,106</u>

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

NORTHWEST SPECIAL RECREATION ASSOCIATION
SPECIAL LEISURE SERVICES FOUNDATION

ORGANIZATIONAL CASH OVERVIEW DECEMBER 31, 2016

		<u>NWSRA</u>	<u>SLSF</u>	<u>TOTAL</u>
<u>WORKING CASH</u>				
	PETTY CASH	\$ 500	\$ 150	\$ 650
	IMPREST/DONORSHARE (Harris Bank)	18,482	476	18,958
	MMKT/BAC (Harris Bank)	1,863,675	239,152	2,102,827
	PAYROLL (Harris Bank)	142,479		142,479
	IPDLAF	178,443		178,443
	TOTAL	<u>2,203,579</u>	<u>239,778</u>	<u>2,443,357</u>
<u>RESERVES: INVESTMENTS</u>				
	BF EDWARDS		1,197,098	1,197,098
	PFM Asset Management	<u>1,271,525</u>		<u>1,271,525</u>
	TOTAL	<u>1,271,525</u>	<u>1,197,098</u>	<u>2,468,623</u>
<u>RESERVES:</u>				
	<u>OPERATING</u>			
	<u>CAPITAL</u>			
	MAX SAFE 1 (Village Bank & Trust)	1,269,026		1,269,026
	MAX SAFE 2 (Village Bank & Trust)	<u>91,831</u>		<u>91,831</u>
	TOTAL	<u>1,360,856</u>		<u>1,360,856</u>
<u>TOTAL CASH & RESERVES</u>				
	December 31, 2016	<u><u>\$ 4,835,960</u></u>	<u><u>\$ 1,436,876</u></u>	<u><u>\$ 6,272,836</u></u>

<u>TOTAL CASH & RESERVES</u>				
	December 31, 2015			
	CASH	\$ 2,260,924	\$ 107,344	\$ 2,368,268
	RESERVES - OPER	1,159,343		1,159,343
	RESERVES - CAP	140,509		140,509
	RESERVES - INVEST	<u>1,000,440</u>	<u>1,228,927</u>	<u>2,229,367</u>
		<u><u>\$ 4,561,216</u></u>	<u><u>\$ 1,336,271</u></u>	<u><u>\$ 5,897,487</u></u>

SPECIAL LEISURE SERVICES FOUNDATION

BUDGET VS ACTUAL and CASH BALANCE

DECEMBER 31, 2016

(A) BUDGET VS ACTUAL		REVENUE			EXPENSES			EXCESS REVENUE (EXPENSE)		
MONTH	BUDGET	ACTUAL	OVER (UNDER)	BUDGET	ACTUAL	OVER (UNDER)	BUDGET	ACTUAL	OVER (UNDER)	
January	19,982	3,057	(16,925)	4,838	7,643	2,804	15,143	(4,586)	(19,729)	
February	43,499	32,062	(11,437)	14,765	18,299	3,533	28,734	13,763	(14,971)	
March	36,328	57,686	21,358	6,395	688	(5,707)	29,933	56,998	27,065	
April	17,153	36,757	19,604	2,582	7,162	4,579	14,571	29,596	15,025	
May	32,153	70,228	38,075	108,240	114,075	5,835	(76,087)	(43,847)	32,240	
June	30,028	41,076	11,048	8,283	24,036	15,753	21,745	17,040	(4,705)	
July	19,210	38,881	19,671	4,983	12,351	7,368	14,227	26,530	12,303	
August	36,160	52,835	16,675	1,450	4,665	3,215	34,710	48,170	13,460	
September	49,688	78,632	28,944	24,571	14,988	(9,583)	25,117	63,644	38,527	
October	33,516	40,384	6,868	120,015	98,858	(21,158)	(86,499)	(58,474)	28,025	
November	71,166	52,464	(18,702)	16,695	25,506	8,810	54,471	26,958	(27,513)	
December	32,277	34,750	2,473	108,284	163,987	55,703	(76,006)	(129,237)	(53,231)	
TOTAL YTD		421,159	538,811	117,652	421,102	492,256	71,154	57	46,555	46,498

(B) CASH BALANCE	BEGINNING OF	EXCESS REV.	NON-CASH	NON CASH	BALANCE SHEET	END OF
	MONTH	(EXP.) FOR MONTH	REVENUE	EXPENSES	TRANSACTIONS	MONTH
January	1,390,879	(19,729)			(1,457)	1,369,694
February	1,369,694	(14,971)			28,734	1,383,457
March	1,383,457	27,065			29,933	1,440,455
April	1,440,455	15,025			14,321	1,469,801
May	1,469,801	32,240			(76,088)	1,425,953
June	1,425,953	17,040			0	1,442,993
July	1,442,993	26,530			0	1,469,523
August	1,469,523	48,170			(2,355)	1,515,338
September	1,515,338	63,644			0	1,578,982
October	1,578,982	(58,474)			0	1,520,508
November	1,520,508	26,958			12,850	1,560,316
December	1,560,316	(129,237)			0	1,431,079

SPECIAL LEISURE SERVICES FOUNDATION

BUDGET VS ACTUAL - SUMMARY BY TYPE

TWELVE MONTHS ENDING DECEMBER 31, 2016

	2016			2015
	<u>ACTUAL</u>	<u>BUDGET</u>	<u>OVER (UNDER)</u>	<u>PRIOR YR ACTUAL</u>
<u>REVENUE</u>				
GRANTS	104,816	75,455	29,361	77,039
RESTRICTED FUNDRAISING	56,930	53,175	3,755	57,779
RESTRICTED DONATIONS	2,990	2,958	32	7,210
UNRESTRICTED FUNDRAISING	248,659	232,629	16,030	273,745
UNRESTRICTED DONATIONS	54,872	24,500	30,372	35,748
NET INCOME CARRY OVER	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>
TOTAL REVENUE	468,266	388,717	79,550	451,521
<u>EXPENDITURES</u>				
ADMINISTRATION	34,423	24,788	9,635	30,276
RESTRICTED FUNDRAISING	11,704	12,002	(298)	12,060
UNRESTRICTED FUNDRAISING	90,935	86,028	4,907	84,827
GRANTS GIVEN	<u>355,196</u>	<u>190,000</u>	<u>165,196</u>	<u>310,000</u>
TOTAL EXPENSES	492,257	312,818	179,439	437,163
<u>OPERATING</u>				
EXCESS REVENUE (EXPENSES)	<u>(23,991)</u>	<u>75,898</u>	<u>(99,889)</u>	<u>14,358</u>
<u>INVESTMENT INCOME (LOSS)</u>	70,545	165	70,380	15,460
*				
<u>NET EXCESS REVENUE (EXPENSE)</u>	<u>\$ 46,554</u>	<u>\$ 76,063</u>	<u>\$ (29,509)</u>	<u>\$ 29,818</u>

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

Special Leisure Services Foundation

Balance Sheet

As of October 31, 2016

	Oct 31, 16
ASSETS	
Current Assets	
Checking/Savings	
10100 · Petty Cash	150.00
10200 · BAC Account (Harris Bank)	174,832.62
10400 · Cash Banks	1,660.00
10600 · DonorShare (Harris Bank)	476.37
11300 · BENJAMIN EDWARDS	
11310 · Investments-Cash	117,118.04
11300 · BENJAMIN EDWARDS - Other	1,230,103.84
Total 11300 · BENJAMIN EDWARDS	1,347,221.88
11830 · Credit Card - Visa	-3,832.73
Total Checking/Savings	1,520,508.14
Total Current Assets	1,520,508.14
Other Assets	
12500 · PREPAID EXPENSES	1,499.97
Total Other Assets	1,499.97
TOTAL ASSETS	1,522,008.11
LIABILITIES & EQUITY	
Equity	
29000 · Retained Earnings	1,355,691.68
29200 · Net Assets-Temp. Restricted	17,483.05
Net Income	148,833.38
Total Equity	1,522,008.11
TOTAL LIABILITIES & EQUITY	1,522,008.11

Special Leisure Services Foundation

Balance Sheet

As of November 30, 2016

	Nov 30, 16
ASSETS	
Current Assets	
Checking/Savings	
10100 · Petty Cash	150.00
10200 · BAC Account (Harris Bank)	203,872.19
10600 · DonorShare (Harris Bank)	476.37
11300 · BENJAMIN EDWARDS	
11310 · Investments-Cash	117,118.04
11300 · BENJAMIN EDWARDS - Other	1,244,496.29
Total 11300 · BENJAMIN EDWARDS	1,361,614.33
11820 · Credit Card - MasterCard	-14.00
11830 · Credit Card - Visa	-5,782.73
Total Checking/Savings	1,560,316.16
Total Current Assets	1,560,316.16
Other Assets	
12500 · PREPAID EXPENSES	1,499.97
Total Other Assets	1,499.97
TOTAL ASSETS	1,561,816.13
LIABILITIES & EQUITY	
Liabilities	
Current Liabilities	
Other Current Liabilities	
21200 · Deferred Revenue	12,850.00
Total Other Current Liabilities	12,850.00
Total Current Liabilities	12,850.00
Total Liabilities	12,850.00
Equity	
29000 · Retained Earnings	1,355,691.68
29200 · Net Assets-Temp. Restricted	17,483.05
Net Income	175,791.40
Total Equity	1,548,966.13
TOTAL LIABILITIES & EQUITY	1,561,816.13

Special Leisure Services Foundation

Balance Sheet

As of December 31, 2016

	Dec 31, 16
ASSETS	
Current Assets	
Checking/Savings	
10100 · Petty Cash	150.00
10200 · BAC Account (Harris Bank)	239,151.81
10600 · DonorShare (Harris Bank)	476.37
11300 · BENJAMIN EDWARDS	
11310 · Investments-Cash	117,118.04
11300 · BENJAMIN EDWARDS - Other	1,079,979.54
Total 11300 · BENJAMIN EDWARDS	1,197,097.58
11820 · Credit Card - MasterCard	-14.00
11830 · Credit Card - Visa	-5,782.73
Total Checking/Savings	1,431,079.03
Total Current Assets	1,431,079.03
Other Assets	
12500 · PREPAID EXPENSES	1,499.97
Total Other Assets	1,499.97
TOTAL ASSETS	1,432,579.00
LIABILITIES & EQUITY	
Liabilities	
Current Liabilities	
Other Current Liabilities	
21200 · Deferred Revenue	15,500.00
Total Other Current Liabilities	15,500.00
Total Current Liabilities	15,500.00
Total Liabilities	15,500.00
Equity	
29000 · Retained Earnings	1,355,691.68
29200 · Net Assets-Temp. Restricted	17,483.05
Net Income	43,904.27
Total Equity	1,417,079.00
TOTAL LIABILITIES & EQUITY	1,432,579.00

SLSF
FY 2016
Financial Report
January-December 2016

Line Item #	Description	FY 2016 Budget	January-December 2016	% Change from Budget	Explanation
Income					
31110	Interest Income	180.00	104.49	58.1%	Anticipated interest income was over estimated for FY2016.
31200	Grants Received	83,000.00	104,816.02	126.3%	The overage in this account is due to successful grants over \$50,000 written for the new Snoezelen room, an unbudgeted expense.
31300	Restricted Fundraising	54,000.00	56,929.75	105.4%	Additional registrants accounted for the overage in this line item as well as a slight increase in sponsorship.
31400	Restricted Donations	4,350.00	2,990.00	68.7%	The spring annual appeal is the source of most of SLSF's restricted donations. The 2016 spring appeal brought in less money than budgeted.
32300	Unrestricted Fundraising	232,629.00	246,008.50	105.8%	Similar to the restricted events, the unrestricted fundraising events brought in additional revenue from a slight uptick in registrations and sponsorship.
32400	Unrestricted Donations	47,000.00	54,872.17	116.7%	The increase in this account can be ascribed to three unexpected participant memorial requests for funds to be given to SLSF as well as an uptick in miscellaneous donations.
33700	Investment Transfer	-	21,547.00	0.0%	Assist with payment for the Snoezelen room.
	Total Revenue	421,159.00	487,267.93	115.7%	SLSF was vigilant in contacting new and former donors about the need for unbudgeted dollars for the Snoezelen room. Successful grant-writing also contributed to the additional dollars raised for that room. SLSF marketed the need for additional dollars to support NWSRA initiatives which translated into additional donations. The SLSF board also was active in seeking additional donations in 2016. Examples being the \$10,000 ESPN grant initiated by Jonathan Salk and Tom Campone's request for SLSF donations in lieu of birthday gifts.
Expense					
Administration					
40100	Postage	3,297.00	6,404.43	194.3%	Additional sponsors, event attendees and donors mean that additional thank you letters needed to be sent. SLSF also sent a postcard to all on the NWSRA and SLSF mailing lists to advertise the Gala and the Fashion Show. That postage was unbudgeted, but paid off in the fact that additional people attended events.
40200	Office Expense	3,000.00	2,147.67	71.6%	This expense is for all office supplies including frames for awards and items that are used for all events and fundraising initiatives. SLSF staff worked to keep these costs at a minimum because we were aware of the overage in the credit card fees.
40250	Credit Card Fees	3,500.00	4,237.08	121.1%	Credit card activity higher than anticipated for FY2016.
40400	Professional Memberships	1,620.00	1,294.00	79.9%	SLSF did not pay for a membership in Association of Fundraising Professionals this year which resulted in savings in this line item.

SLSF
FY 2016
Financial Report
January-December 2016

Line Item #	Description	FY 2016 Budget	January-December 2016	% Change from Budget	Explanation
40500	Education/Training	800.00	873.16	109.1%	SLSF paid for an unbudgeted, but necessary board webinar and membership in "Asking Matters" to assist the board in understanding how each of them can use the skills they have to request donations.
40600	Public Education/Information	16,000.00	12,789.31	79.9%	The SLSF staff is careful about the way they spend the dollars entrusted to the foundation. This account pays for the Holiday Luncheon, board member meetings, sponsorship of other agencies, events and various outreach and informational messages for the foundation. The staff budgets what should be an adequate amount and then are careful with spending.
40700	Printing	2,500.00	2,902.25	116.1%	As mentioned under postage, SLSF sent a postcard to all on the SLSF and NWSRA mailing lists. The donor of the programs for the Gala and the Fashion Show was no longer able to do the printing for free and SLSF had to pay for the printing of those pieces in 2016.
40800	Professional Fees	4,625.00	3,775.00	81.6%	SLSF spent less than the budgeted amount in this account because money is budgeted to pay legal fees if they occur, in 2016 there were no unexpected legal fees billed.
41300	Fundraising Restricted	12,002.00	11,703.88	97.5%	This expense is down slightly due to much of the food for the Moretti's/NWSRA Outing; the steaks and all of the produce was donated in 2016.
42300	Fundraising Unrestricted	88,758.00	90,934.95	102.5%	There were additional attendees at most of the events in 2016. This increases the amount of money raised, but also increases the cost of food, tee-gifts and supplies.
	Subtotal	136,102.00	137,061.73	100.7%	The SLSF staff worked to stay as close to the budget as possible because we were aware that some of the year's costs (credit card fees and the cost of printing the Fashion Show/Gala postcards) were going to be higher than expected which also increased the postage costs.
Grants Given					
43100	NWSRA Lightning Athletes	45,000.00	44,306.25	98.5%	Costs for NWSRA athletes were just under the amount budgeted due to the Booster Club donating funds to pay for needed athletic equipment.
43200	Accessible Vehicles	65,000.00	61,699.00	94.9%	The actual cost of the bus purchased by NWSRA is less than the budgeted amount of \$65,000.
43300	Scholarships	75,000.00	73,783.00	98.4%	Scholarships were redesigned to allow for most to be given at a 50% rate rather than a 100% rate allowing additional scholarships to be awarded, but each scholarship awarded was slightly less than in past years.
43400	Inclusion/ADA Compliance	50,000.00	85,594.70	171.2%	Inclusion costs continue to increase so all monies that were saved in the other four funding focuses were granted to inclusion.
43500	General Program Support	50,000.00	19,617.05	39.2%	Money that would have been spent in this line item was allocated to Inclusion.

SLSF
FY 2016
Financial Report
January-December 2016

Line Item #	Description	FY 2016 Budget	January-December 2016	% Change from Budget	Explanation
43650	Capital Improvements	-	70,195.50	0.0%	These costs represent dollars for the Snoezelen room and were paid via additional grant dollars and \$21,547 that the SLSF board approved to be moved from investments to pay for the room.
	Subtotal	285,000.00	355,195.50	124.6%	
	Total Expense	421,102.00	492,257.23	116.9%	SLSF raised money over and above the amount budgeted and was able to assist with the building of the Snoezelen room. The SLSF board had approved SLSF to use up to \$85,000 from investments to pay for the room, but due to successful fundraising initiatives, only \$21, 547 was actually needed.
	Net Total	57.00	(4,989.30)		

VIII. Warrants

Special Leisure Services Foundation**Warrant #11****November 18, 2016**

Num	Name	Account	Amount
7798	Rotary Club of Schaumburg/H.E.	10200 · BAC Account (Harris Bank)	-120.00
		40600 · Public Education/Information	120.00
			120.00
7799	Moretti's Mount Prospect	10200 · BAC Account (Harris Bank)	-1,122.46
		41320 · Food	1,122.46
			1,122.46
7800	Palatine Women's Club	10200 · BAC Account (Harris Bank)	-80.00
		40600 · Public Education/Information	80.00
			80.00
7801	Michael Montoya	10200 · BAC Account (Harris Bank)	-400.00
		42380 · Supplies	400.00
			400.00
7802	Cash/Nanette Sowa	10200 · BAC Account (Harris Bank)	-1,660.00
		10400 · Cash Banks	1,660.00
			1,660.00
7803	FlagHouse	10200 · BAC Account (Harris Bank)	-29,664.24
		43650 · Capital Improvements	1,014.65
		43650 · Capital Improvements	3,300.00
		43650 · Capital Improvements	165.90
		43650 · Capital Improvements	8,299.00
		43650 · Capital Improvements	2,662.20
		43650 · Capital Improvements	1,657.38
		43650 · Capital Improvements	382.61
		43650 · Capital Improvements	653.08
		43650 · Capital Improvements	1,665.24
		43650 · Capital Improvements	486.39
		43650 · Capital Improvements	9,377.79
			29,664.24
7804	BMO Harris Bank Mastercard	10200 · BAC Account (Harris Bank)	-601.02
		40600 · Public Education/Information	36.18
		40600 · Public Education/Information	78.28
		42380 · Supplies	15.60
		40600 · Public Education/Information	25.00
		42320 · Food	44.97
		42380 · Supplies	161.50
		40250 · Credit Card fees	60.59
		40600 · Public Education/Information	32.19
		40600 · Public Education/Information	42.42
		40600 · Public Education/Information	89.29
		40600 · Public Education/Information	15.00
			601.02
7805	BMO Harris Bank Mastercard	10200 · BAC Account (Harris Bank)	-850.15
		42380 · Supplies	31.53
		40600 · Public Education/Information	13.45
		42350 · Prizes	25.05
		42350 · Prizes	84.97
		42380 · Supplies	15.31

Special Leisure Services Foundation**Warrant #11****November 18, 2016**

Num	Name	Account	Amount
		43650 · Capital Improvements	343.99
		43650 · Capital Improvements	37.99
		43650 · Capital Improvements	4.39
		43650 · Capital Improvements	11.89
		43650 · Capital Improvements	15.99
		43650 · Capital Improvements	225.59
		40600 · Public Education/Information	40.00
			<hr/> 850.15
7806	Rotary Club of Arlington Heights	10200 · BAC Account (Harris Bank)	-10,244.89
		42340 · Recognition	10,244.89
			<hr/> 10,244.89
7807	BMO Harris Bank Mastercard	10200 · BAC Account (Harris Bank)	-47.40
		40600 · Public Education/Information	47.40
			<hr/> 47.40
7808	BMO Harris Bank Mastercard	10200 · BAC Account (Harris Bank)	-63.74
		40600 · Public Education/Information	63.74
			<hr/> 63.74
7809	Kolbi Pipe Marker Company	10200 · BAC Account (Harris Bank)	-256.00
		42370 · Printing	256.00
			<hr/> 256.00
7810	Trisha Breitlow	10200 · BAC Account (Harris Bank)	-2,500.00
		42350 · Prizes	2,500.00
			<hr/> 2,500.00
7811	Kathy Zweidinger	10200 · BAC Account (Harris Bank)	-1,000.00
		42350 · Prizes	1,000.00
			<hr/> 1,000.00
7812	Johanna Bisek	10200 · BAC Account (Harris Bank)	-500.00
		42350 · Prizes	500.00
			<hr/> 500.00
7813	Brian Meyer	10200 · BAC Account (Harris Bank)	-500.00
		42350 · Prizes	500.00
			<hr/> 500.00
7814	Michele Paradise	10200 · BAC Account (Harris Bank)	-500.00
		42350 · Prizes	500.00
			<hr/> 500.00
7815	Rotary Club of Schaumburg/H.E.	10200 · BAC Account (Harris Bank)	-54.00
		40600 · Public Education/Information	54.00
			<hr/> 54.00
7816	Allegra	10200 · BAC Account (Harris Bank)	-431.19
		42370 · Printing	431.19
			<hr/> 431.19
7817	Chevy Chase Country Club	10200 · BAC Account (Harris Bank)	-14,559.68

Special Leisure Services Foundation

Warrant #11

November 18, 2016

Num	Name	Account	Amount
		42320 · Food	14,559.68
			14,559.68
7818	Rotary Club of Rolling Meadows	10200 · BAC Account (Harris Bank)	-155.00
		40400 · Professional Memberships	155.00
			155.00
			65,309.77

Motion to approve Warrant #11 in the amount of \$65,309.77

Covering check numbers 7798-7818 from BMO Harris N.O.W

Special Leisure Services Foundation**Warrant #12****December 16, 2016**

Num	Name	Account	Amount
7819	BMO Harris Bank Mastercard	10200 · BAC Account (Harris Bank)	-3,029.65
		41375 · Lightning Athletes Booster Club	99.98
		41375 · Lightning Athletes Booster Club	-439.90
		41375 · Lightning Athletes Booster Club	399.91
		41375 · Lightning Athletes Booster Club	424.91
		40200 · Office Expense	80.90
		40600 · Public Education/Information	44.06
		40200 · Office Expense	46.48
		40600 · Public Education/Information	10.53
		43650 · Capital Improvements	30.17
		43650 · Capital Improvements	50.11
		42380 · Supplies	380.00
		42380 · Supplies	1,902.50
			3,029.65
7820	BMO Harris Bank Mastercard	10200 · BAC Account (Harris Bank)	-579.51
		40600 · Public Education/Information	13.62
		42380 · Supplies	14.72
		42380 · Supplies	11.98
		43650 · Capital Improvements	170.13
		43650 · Capital Improvements	316.34
		43650 · Capital Improvements	28.78
		43650 · Capital Improvements	23.94
			579.51
7821	All Ways Catering & Deli	10200 · BAC Account (Harris Bank)	-542.18
		43650 · Capital Improvements	542.18
			542.18
7822	Julie Swieca Gannon	10200 · BAC Account (Harris Bank)	-60.00
		43650 · Capital Improvements	60.00
			60.00
7823	US Postal Service	10200 · BAC Account (Harris Bank)	-438.91
		40100 · Postage	438.91
			438.91
7824	NWSRA	10200 · BAC Account (Harris Bank)	-151,592.57
		43100 · NWSRA Lightning Athletes	13,154.48
		43200 · Accessible Vehicle Support	61,699.00
		43300 · Scholarships	12,307.75
		43400 · Inclusion (ADA Compliance)	52,594.70
		43500 · General Program Support	11,836.64
			151,592.57
7826	Rotary Club of Schaumburg/H.E.	10200 · BAC Account (Harris Bank)	-54.00
		40600 · Public Education/Information	54.00
			54.00

Special Leisure Services Foundation

Warrant #12

December 16, 2016

Num	Name	Account	Amount
			54.00
7827	FlagHouse	10200 · BAC Account (Harris Bank)	-2,400.00
		43650 · Capital Improvements	2,400.00
			2,400.00
7828	The Printing Factory	10200 · BAC Account (Harris Bank)	-2,133.00
		42370 · Printing	2,133.00
			2,133.00
7829	NWSRA	10200 · BAC Account (Harris Bank)	-448.23
		40100 · Postage	448.23
			448.23
			161,278.05

Motion to approve Warrant #12 in the amount of \$161,278.05

Covering check numbers 7819-7829 from BMO Harris N.O.W

Special Leisure Services Foundation**Warrant #12A****December 31, 2016**

Num	Name	Account	Amount
7830	BMO Harris Bank Mastercard	10200 · BAC Account (Harris Bank)	-625.72
		43650 · Capital Improvements	196.88
		42380 · Supplies	75.05
		43650 · Capital Improvements	191.75
		40600 · Public Education/Information	20.14
		43650 · Capital Improvements	27.98
		43650 · Capital Improvements	76.22
		43650 · Capital Improvements	37.70
			<u>625.72</u>
7831	BMO Harris Bank Mastercard	10200 · BAC Account (Harris Bank)	-5,461.28
		43650 · Capital Improvements	47.98
		43650 · Capital Improvements	398.85
		40600 · Public Education/Information	35.30
		40600 · Public Education/Information	47.96
		43650 · Capital Improvements	71.76
		43650 · Capital Improvements	61.46
		42380 · Supplies	63.84
		43650 · Capital Improvements	205.00
		40600 · Public Education/Information	318.50
		43650 · Capital Improvements	51.28
		40600 · Public Education/Information	12.00
		40600 · Public Education/Information	4,147.35
			<u>5,461.28</u>
			<u>6,087.00</u>

Motion to approve Warrant #12A in the amount of \$ 6,087.00**Covering check numbers 7830-7831 from BMO Harris N.O.W**

IX. Old Business

LEASE OF PARK DISTRICT PROPERTY

This Lease Agreement ("Lease") dated this ____ day of _____, 2017, between the HANOVER PARK PARK DISTRICT ("HPPD"), a body politic and corporate which is an Illinois unit of government organized and operating under the Park District Code (70 ILCS 1205/1-1, *et seq.*), and NORTHWEST SPECIAL RECREATION ASSOCIATION ("NWSRA"), an Association of Illinois Park Districts formed pursuant to §8-10b of the Park District Code (70 ILCS 1205/8-10b), is made under and by virtue of the authority granted in the Park District Code, pursuant to 70 ILCS 1205/8-16 and 10-7.

For and in consideration of the mutual promises herein set forth, the parties AGREE:

1. PROPERTY.

HPPD hereby leases to NWSRA the Aerobic Room and storage area located on the second floor off of the Walnut Avenue entrance, consisting of approximately 2,730.00 square feet (the "Premises") of the Building situated at 1919 Walnut Avenue, Hanover Park, Illinois, and known as the Hanover Park Park District Community Center, together with reasonable access to the Premises, and further grants to NWSRA during the term of this Lease a non-exclusive license to the use of the parking lot located at the North end of the Hanover Park Park District Community Center for parking for its staff and persons attending its programs. A description of the Premises is attached to this Agreement as Exhibit "A".

2. LESSEE'S USE.

NWSRA shall have the use and occupancy of the Premises for administrative purposes and its recreational programs for the handicapped. HPPD shall have the right to approve all programs conducted on and all uses of the Premises, such approval not to be unreasonably withheld or delayed.

3. RENT.

The rent for the Premises is \$17,316 per year (based upon a pre-agreed upon amount which includes Maintenance and Custodial Services) during the first five years of the Lease. Thereafter, the parties shall mutually agree upon a rent amount. Any increase in rent shall not exceed either five percent (5%) or the then current applicable Consumer Price Index, whichever is less. On or before the Commencement Date described below, NWSRA shall pay to HPPD the initial amount of \$1,443, representing the first month's payment. Thereafter, payment shall be made monthly and are due by the 10th of the month.

4. TERM.

The Term of this Lease shall be for one hundred eighteen (118) months, commencing on the 1st day of March 1, 2017 ("Commencement Date") and terminating on the 31st day of December, 2026. NWSRA shall have the right to terminate this Lease effective January 1st of any year during the Term by providing HPPD with a written notice of termination at least ninety (90) days prior to the effective termination date.

4. MAINTENANCE AND REPAIRS.

A. NWSRA shall keep and maintain the Premises in reasonable repair and condition during the term of the lease, the same as on the Commencement Date, subject only to ordinary wear and tear. HPPD shall not be obligated to repair or maintain the condition of the Premises in any way, except for providing the Maintenance and Janitorial Services set forth herein. NWSRA shall perform normal and reasonable repair and painting of the interior of the walls and windows, when needed, at its sole expense, and replace any and all broken glass and doors and, in general, to reasonably maintain and repair the Premises. HPPD shall be responsible for any necessary repair to the foundation or interior of the walls of the Premises. All other repairs required to maintain the use of the Premises, including but not limited to, heating and electrical wiring relative to such Premises, during the term of this lease, shall be the sole obligation of HPPD. If at any time in the reasonable opinion of HPPD there is a need for substantial repair which affects habitability or proper use of the Premises, HPPD shall notify NWSRA of such fact in writing and if NWSRA fails to effect such repairs at its own expense within a reasonable period of time after it receives such notice, HPPD shall have the right to enter upon the Premises, make all such repairs and thereafter recover all of its costs, including the reasonable value of work performed by HPPD employees. The right of HPPD hereunder is in no way intended to and in no way shall be construed to impose upon HPPD any obligation to inspect the Premises for any purposes whatsoever or to otherwise be responsible for the safety or habitability of the Premises.

B. During the term of this Lease, HPPD shall provide routine maintenance and custodial services ("Maintenance and Custodial Services") to the Premises to the same standard as currently provided to the areas of the Hanover Park Park District Community Center occupied by HPPD and NWSRA.

C. HPPD may enter the Premises at all reasonable times for the purpose of making any repair or alterations therein as it may deem necessary for the safety, preservation or improvement of the Premises or the Hanover Park Park District Community Center; provided, however, that HPPD'S rights hereunder are not intended to and in no way shall be construed to impose upon HPPD any obligation to inspect the Premises for any purpose whatsoever or to make any repairs or alterations thereto or therein. NWSRA will make no alterations in or

additions to the Premises without first obtaining HPPD'S written consent, although NWSRA may erect work station dividers in the Premises which NWSRA shall remove upon termination of this lease, putting any such rooms into the same condition as they were prior to the room dividers being installed, less ordinary wear and tear.

5. ADDITIONS AND ALTERATIONS.

____ Prior to the commencement of the Lease Term, HPPD agrees to install a second floor accessible ramp for the Premises in accordance with the plans and specifications attached hereto as Exhibit "B". The parties acknowledge that HPPD shall be reimbursed for the costs for the installation of the ramp through a separate agreement with the Special Leisure Services Foundation in an amount not to exceed \$275,000.00.

6. ADDITIONAL TERMS.

A. No representations, except such as are specifically set forth herein, have been made to NWSRA respecting the condition of the Premises. The taking of possession of the Premises by NWSRA shall be conclusive evidence as against NWSRA that said Premises were in good and satisfactory condition when possession of the same was so taken; and NWSRA will, at the termination of this lease by lapse of time or otherwise, return the Premises to HPPD in as good condition as when received, loss by ordinary wear and tear excepted.

B. NWSRA, without written consent by HPPD, shall not assign this lease or any interest hereunder and will not sublet the Premises or any part thereof and will not permit the use of said Premises by any parties other than NWSRA and its agents and servants.

C. HPPD shall not be liable for any damage, either to person or property, sustained by NWSRA or by other persons, due to the Premises, or the Hanover Park Park District Community Center, as a whole, or any part of either or any appurtenances thereof, becoming out of repair, or due to the happening of any accident in or about the Premises or the Hanover Park Park District Community Center except for those situations which arise out of HPPD's negligent, reckless or intentional misconduct. The parties agree to indemnify and hold each other harmless from and against any and all third party proceedings or suits in which either party may be named, and any and all damages, liabilities, costs or expenses (including reasonable attorneys' fees) which either party may sustain, suffer or incur, relating to the negligent, reckless or intentional misconduct of the other party.

D. Both HPPD and NWSRA are members of the Park District Risk Management Agency (PDRMA") and acknowledge that the coverage provided by PDRMA is acceptable to each of them with respect to the obligations of the other hereunder. In the event that either or both of HPPD and NWSRA cease to be

members of PDRMA, the parties shall promptly negotiate a replacement provision for reasonably acceptable insurance coverage through private carriers.

E. HPPD shall provide electricity, water, sewer and gas to the Premises at no additional charge.

F. In the event of any breach of this Lease, it is the intention of the parties that their remedies be limited to damages, specific performance or injunctive relief. Notwithstanding, in the event of a material breach by NWSRA involving health or safety or its failure to be a member of PDRMA (or obtain substitute insurance as provided herein), HPPD may, at its option and in its sole discretion, following ten (10) days prior notice, during which time NWSRA may cure such breach, declare this Lease terminated, whereupon HPPD may repossess itself of the Premises. NWSRA shall not be entitled to return of any unpaid rents, all of which shall be deemed liquidated damages with respect to potential loss of rents due to inability to file a suitable replacement tenant; however, HPPD shall retain the right to pursue any and all other remedies with respect to all other losses, including but not limited to costs of repair of the Premises.

G. NWSRA shall not be responsible for damage to the Premises resulting from fire, explosion or other casualty, but shall remain responsible for all NWSRA contents therein. HPPD shall be responsible for all damages to the Hanover Park Park District Community Center (including the portion constituting the Premises) resulting from fire, explosion or other casualty and shall take all reasonable steps to promptly restore said property to its condition prior to said casualty. Each party shall promptly submit claims to PDRMA and shall cooperate with PDRMA and each other.

H. NWSRA specifically covenants that it will hold and maintain the Premises exclusively for public park or recreational purposes; NWSRA'S rights to possess and occupy the Premises shall automatically revert to HPPD if NWSRA knowingly violates said covenant by allowing all or any part of the Premises to be used for purposes other than park or recreational purposes, all as provided in 70 ILCS 1205/10-7.

I. All notices hereunder shall be in writing. Delivery of such notices may be by personal delivery or by regular mail, as hereinafter stated. Personal delivery to HPPD may be had by delivery of any such notice to the Secretary or the President of the Board of HPPD; personal delivery to NWSRA may be had by delivery of any such notice to the Secretary or the Chairperson of the Board of Trustees of NWSRA. Mail delivery to either party shall be had by mailing any such notice in a properly stamped and addressed envelope addressed to the addresses shown below. Any such mail delivery shall be deemed received by the recipient on the 2nd day subsequent to deposit of any such envelope in a proper U.S. mail receptacle for mail deposits.

DATED the year, month and day first aforesaid.

HANOVER PARK PARK DISTRICT

By: _____

Attest: _____

Address for Notices:
1919 Walnut Avenue
Hanover Park, IL 60133

NORTHWEST SPECIAL RECREATION
ASSOCIATION

By: _____

Attest: _____

Address for Notices:
3000 Central Road, Suite 205
Rolling Meadows, IL 60008

To: SLSF Board of Directors
From: Tracey Crawford
Re: Memorandum of Understanding
Date: January 17, 2017

Motion:

A motion to approve the Memorandum of Understanding as presented.

MEMORANDUM OF UNDERSTANDING

THIS MEMORANDUM OF UNDERSTANDING ("MOU") is entered into and made effective as of this ____ day of January, 2017 by and between the HANOVER PARK PARK DISTRICT ("**Park District**") a body politic and corporate operating under the Illinois Park District Code (70 ILCS 1205/1-1 et. seq.) and the SPECIAL LEISURE SERVICES FOUNDATION ("**SLSF**"), an Illinois not-for-profit corporation.

RECITALS

WHEREAS, SLSF is an Illinois not-for-profit corporation whose mission is to support the programs and raise funds in support of the Northwest Special Recreation Association ("NWSRA"); and

WHEREAS, NWSRA and the Park District have entered into a separate Lease Agreement whereby NWSRA has agreed to lease space from the Park District at the Park District's Community Center located at 1919 Walnut Avenue, Hanover Park, Illinois; and

WHEREAS pursuant to the Lease Agreement, the Park District has agreed to perform certain improvements at the Community Center, including the installation of a second floor accessible ramp in accordance with the proposal submitted by Recreation Accessibility Consultants, LLC, a copy of which is attached to this MOU as Exhibit A and incorporated herein; and

WHEREAS, SLSF has agreed to contribute funds towards the installation of the second floor accessible ramp in an amount not to exceed \$275,000; and

WHEREAS, the Park District and SLSF now desire to enter into this MOU outlining their mutual responsibilities.

NOW THEREFORE, in consideration of the promises and provisions contained herein, and other good and valuable consideration, the receipt and sufficiency of such being hereby acknowledged, the Parties agree to the following:

1. The above recitals are incorporated herein as fully set forth.
2. The Park District agrees to perform the improvements to the Community Center as outlined in the proposal submitted by Recreation Accessibility Consultants, LLC, including but not limited to the second floor accessible ramp.
3. SLSF agrees to reimburse the Park District for the design and construction costs for the installation of the second floor accessible ramp in an amount not to exceed \$275,000.
4. The Park District shall be responsible for all costs associated with the installation of the second floor accessible ramp in excess of \$275,000.

5. The Park District shall provide SLSF with copies of all paid invoices for the design and construction of the second floor accessible ramp for approval and reimbursement from SLSF.

6. SLSF shall not be required to reimburse the Park District for any cost associated with work other than the second floor accessible ramp.

7. The invoices submitted from the Park District shall contain sufficient detail to show the work for which it is seeking reimbursement is specifically dedicated to the second floor accessible ramp.

8. SLSF shall submit reimbursement to the Park District within thirty (30) days of receipt of the invoices for the work.

9. SLSF shall have no responsibility for the design, construction means and methods for the installation of the ramp, those being the sole responsibility of the Park District and its retained consultants and contractors.

IN WITNESS WHEREOF, the parties hereto have executed this MOU as of the day and year first written above.

HANOVER PARK DISTRICT,
an Illinois body politic and corporate

By: _____

Its: President

Attested to by: _____

Its: Secretary

SPECIAL LEISURE SERVICES FOUNDATION ,
an Illinois not-for-profit corporation

By: _____

Its: President

and

By: _____

Its: Secretary

DRAFT COPY

HANOVER PARK PARK DISTRICT PROPOSED SCHEDULE FOR HPPD-NWSRA RAMP PROJECT 2016-2017

HPPD Board Reviews WT Proposal	November 14, 2016
HPPD Board Approves WT Proposal	November 28, 2016
WT Divisions Review w/Village Staff Permit Requirements	
WT Develops Bid Specs, Drawings	
HPPD Board Reviews Alt #2	December 12, 2016
HPPD Board Approves Alt #2	December 19, 2016
WT & HPPD Meet w/Village Staff Permit Requirements	
WT Bid Documents to HPPD Staff/Mraz	January 13, 2017
HPPD Legal Review Completed	January 20
Bid Notice Out (Mraz)	January 23
Bid Packets Ready (WT/Mraz)	January 23
Bids Out	January 23
Bid Package Pickup & Bid Log (HPPD)	January 23
Pre-Bid Meeting @ 10:00 a.m.	January 31
WT & Contractors @ Site	
Bids Open @ HPPD	February 21
HPPD Board Reviews Bids	February 27
HPPD Board Approves & Awards Bid (Sp. Mtg)	March 13
Notice of Award (HPPD)	March 14
Contractor Pulls Permits	
P&P Bonds & COI Due	March 24
Contractor Submits Project Timeline (HPPD & WT)	March 24
Contractor Mobilizes	March 27
Construction Begins	April 3
Landscape Restoration Begins (weather permitting)	May 19
Punch List Review (HPPD & WT)	May 19
Completion of Project	May 26
Punch List Completed	May 31

X. New Business

To: SLSF Board of Directors
From: Tracey Crawford, Executive Director
Re: Installation of Officers
Date: January 17, 2017

Motion:

A motion to approve the Installation of Officers:

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

To: SLSF Board of Directors
From: Tracey Crawford, Executive Director
Re: Approval of Terms and Committees
Date: January 17, 2017

Motion:

A motion to approve the Terms and Committees of SLSF as presented.

SPECIAL LEISURE SERVICES FOUNDATION BOARD TERMS

January 17, 2017

TERMS

2015-2017

Carl Arthur – Chair
Tom Campone
Jacky Cartwright
Dennis Hanson
Brian Rubin
Vicki Carney
Jonathan Salk
Rita Fletcher

2016-2018

Kathy Nowicki
Anthony Gattuso
Dennis Stein
Stephanie Bertelsen
Al Crook

2017-2019

Jim Houser – Vice Chair
Terri Oates – Past Chair
Tom Perkins
Amy Charlesworth
Mike Clark
Ernest Blomquist

<u>Executive Committee</u>	<u>Investment Committee</u>
Carl Arthur – Chair	Carl Arthur – Chair
Jim Houser – Vice Chair	Jim Houser – Vice Chair
Terri Oates – Past Chair	Terri Oates – Past Chair
Tracey Crawford – President	Tracey Crawford – President
Amy Charlesworth – Secretary and Organizational Treasurer	Vicki Carney Anthony Gattuso

To: SLSF Foundation Board
From: Tracey Crawford, Executive Director
Re: Appointment of Legal Council
Date: January 17, 2017

Motion:

A motion to approve the following Legal Council appointments:

- A. Massucci, Blomquist, Anderson & Dunn (SLSF)

To: NWSRA Board of Trustees
From: Tracey Crawford, Executive Director
Re: Appointment of Board President
Date: January 17, 2017

Motion:

A motion to approve the Appointment of Tracey Crawford as President of SLSF.

RESOLUTION 2017-4

**APPOINTMENT OF NORTHWEST SPECIAL RECREATION ASSOCIATION
REPRESENTATIVE TO 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 to 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 25th day of January, 2017

To: SLSF Board of Directors

From: Tracey Crawford

Re: BF Edwards Reverse Notification Resolution 2017-6

Date: January 17, 2017

Motion:

A motion to approve the Benjamin F. Edwards Reverse Notification Resolution 2017-6 as presented.

RESOLUTION 2017-6
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.

Carl Arthur, Chairman

Date: January 17, 2017

Amy L. Charlesworth, Organizational Treasurer

Date: January 17, 2017

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 Carl Arthur 665 Tahoe Trail Palatine, 60074	Chairman of NWSRA Tony LaFrenere 911 Jeffery Court Schaumburg, IL 60193
Vice Chair of the Foundation Jim Houser 415 Bernadette Lane Batavia, IL 60510	Organizational Treasurer of the Foundation Amy L. Charlesworth 3 Stoneridge Road Rolling Meadows, IL 60008

To: SLSF Board of Directors
From: Tracey Crawford
Re: BMO Harris Resolution 2017-7
Date: January 17, 2017

Motion:

A motion to approve the BMO Harris Bank Resolution dated January 17, 2017, as indicated below.

BMO Harris Bank Resolution 2017-7 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 17, 2017

Num	Name	Account	Amount
7832	Arlington Heights Chamber of Comm	10200 · BAC Account (Harris Bank)	-300.00
		40400 · Professional Memberships	300.00
			300.00
7833	Allegra	10200 · BAC Account (Harris Bank)	-324.43
		42370 · Printing	324.43
			324.43
7834	American Philanthropic	10200 · BAC Account (Harris Bank)	-5,000.00
		40800 · Professional Fees	5,000.00
			5,000.00
7835	Rotary Club of Schaumburg/H.E.	10200 · BAC Account (Harris Bank)	-102.00
		40600 · Public Education/Information	72.00
		40400 · Professional Memberships	30.00
			102.00
7836	Bartlett Parks Foundation	10200 · BAC Account (Harris Bank)	-105.00
		40600 · Public Education/Information	105.00
			105.00
Total for Warrant #1			5,831.43

Motion to approve Warrant #1 in the amount of \$5,831.43
Covering check numbers 7832-7836 from BMO Harris N.O.W.

XI. Information/ Action Items



FY 2017

Proposed Budget

Proposed SLSF 2017 Budget

Account Number	Name of Account	FY 2016	PYE 2016	Proposed FY 2017	FY 2016 - Proposed FY 2017	% Change FY 2016 - Proposed FY 2016
Income						
31110	Interest Income	\$180.00	\$100.43	\$110.00	-\$70.00	-38.89%
31200	Grants Received	\$83,000.00	\$104,816.02	\$75,500.00	-\$7,500.00	-9.04%
31300	Restricted Fundraising	\$54,000.00	\$56,929.75	\$55,910.00	\$1,910.00	3.54%
31400	Restricted Donations	\$4,350.00	\$2,990.00	\$3,900.00	-\$450.00	-10.34%
32300	Unrestricted Fundraising	\$232,629.00	\$243,688.50	\$245,260.00	\$12,631.00	5.43%
32400	Unrestricted Donations	\$47,000.00	\$56,813.42	\$50,000.00	\$3,000.00	6.38%
33700	Investment Transfer	\$0.00	\$21,547.00	\$275,000.00	\$275,000.00	#DIV/0!
	Total	\$421,159.00	\$486,885.12	\$705,680.00	\$284,521.00	67.56%
Expense						
40100	Postage	\$3,297.00	\$6,017.29	\$6,000.00	\$2,703.00	81.98%
40200	Office Expense	\$3,000.00	\$2,515.17	\$3,000.00	\$0.00	0.00%
40250	Credit Card Fees	\$3,500.00	\$4,052.71	\$4,500.00	\$1,000.00	28.57%
40300	Newsletter Printing	\$0.00	\$0.00	\$0.00	\$0.00	0.00%
40400	Professional Memberships	\$1,620.00	\$1,139.00	\$1,570.00	-\$50.00	-3.09%
40500	Education/Training	\$800.00	\$873.16	\$700.00	-\$100.00	-12.50%
40600	Public Education/Information	\$16,000.00	\$14,611.52	\$16,000.00	\$0.00	0.00%
40700	Printing	\$2,500.00	\$2,902.25	\$3,000.00	\$500.00	20.00%
40800	Professional Fees	\$4,625.00	\$3,775.00	\$14,225.00	\$9,600.00	207.57%
41300	Restricted Fundraising	\$12,002.00	\$11,703.88	\$12,880.00	\$878.00	7.32%
42300	Unrestricted Fundraising	\$88,758.00	\$88,772.06	\$93,275.00	\$4,517.00	5.09%
	Administration	\$136,102.00	\$136,362.04	\$155,150.00	\$19,048.00	14.00%
	Grants Given:					
43100	NWSRA Lightning Athletes	\$45,000.00	\$45,000.00	\$30,000.00	-\$15,000.00	-33.33%
43200	Accessible Vehicle Support	\$65,000.00	\$65,000.00	\$48,000.00	-\$17,000.00	-26.15%
43300	Scholarships	\$75,000.00	\$75,000.00	\$70,000.00	-\$5,000.00	-6.67%
43400	Inclusion	\$50,000.00	\$50,000.00	\$39,000.00	-\$11,000.00	-22.00%
43500	General Program Support	\$50,000.00	\$50,000.00	\$88,000.00	\$38,000.00	76.00%
43700	RMCC Lease	\$0.00	\$0.00	\$0.00	\$0.00	0.00%
	Total SLSF Grant to NWSRA	\$285,000.00	\$285,000.00	\$275,000.00	-\$10,000.00	-3.51%
43650	Capital Improvements	\$0.00	\$72,000.00	\$275,000.00	\$275,000.00	#DIV/0!
	2016 Snoezelen Room					
	2017 Accessible Ramp for PURSUIT 2					
	Total Grants	\$285,000.00	\$357,000.00	\$550,000.00	\$265,000.00	92.98%
	Total Expenses	\$421,102.00	\$493,362.04	\$705,150.00	\$284,048.00	67.45%
	NET TOTAL	\$57.00	-\$6,476.92	\$530.00	-\$473.00	-829.82%
31100	Investment Income	\$0.00	\$0.00	\$0.00	\$0.00	0.00%
31205	Grant Reserves	\$0.00	\$0.00	\$0.00	\$0.00	0.00%
	BALANCE	\$57.00	-\$6,476.92	\$530.00	\$473.00	829.82%

*** under 40800 - \$10,000 increase for the payment of the American Philanthropic Development Plan

KEY	
FY 2016 (Fiscal Year 2016) - This is the budget that was approved for 2016	
PYE 2016 (Projected Year End 2016) - This is a projection of additional revenues and expenditures through December 31.	
Proposed FY 2017 - (Proposed Fiscal Year 2017) - This is the proposed budget for 2017	

Cornerstones Three cornerstones recognized as essential to SLSF's continued success reviewed during strategic planning years.	Focus/Long-Term Goals The area of focus under each corner stone. These are broad ideas that are developed every 3 – 5 yrs. during strategic planning.	Short-Term Goals What we need to do to address our long term goals, annually, under each focus/long term goal.	Measurable Objective The measurable actions that will tell us that we are succeeding.	Status The progress report for each objective.
Fundraising				
<u>Goals completed by:</u> Nanette Cathy Tracey	Fundraising Ensure maintenance of current fundraising levels through implementation of targeted, effective fundraising efforts	<ul style="list-style-type: none"> Continue to provide a calendar of quality fundraising events Seek out additional sponsors by attending networking events and area chamber of commerce events. Maintain current grant timeline. Research and apply for new grants that support the goals of the foundation. Identify new, smaller sponsorship opportunities for targeted NWSRA events 	<ul style="list-style-type: none"> Provide at least 8 fundraising events Contact 5 new potential sponsors Apply for at least 90% of previous year's grants Research and apply for two new grants Identify 3 new sponsorship opportunities for targeted NWSRA events 	<ul style="list-style-type: none"> SLSF has confirmed 8 events for the 2016 year. They are listed on the calendar and each has a committee and venue in place. SLSF has hired an outside firm to create a development plan for the foundation.

		<ul style="list-style-type: none"> • Research and contact companies within the 17 park district area that can be enlisted as SLSF partners • Create and promote an individual giving opportunity that allows for small monthly gifts given automatically through an online processor. • SLSF will seek donors/grants/sponsors to fund the creation of an updated sensory room at the RMCC program space. • If adequate funds are not received by June, the Sensory Room will be the focus of the Gala's Impact Auction 	<ul style="list-style-type: none"> • Research and contact 3 companies within the 17 park district area • Create and promote one individual giving opportunity with monthly gift option • Find 2 potential donors/grants/sponsors for PURSUIT 2 	
Marketing and Technology				
Goals Completed by: Brian Janet Tracey	Marketing & Technology	<ul style="list-style-type: none"> • Use the SLSF name/logo on all communications 	<ul style="list-style-type: none"> • Publish the SLSF name/logo in at least 5 print 	

SLSF 2017 Foundation Goals

Nanette Cathy	<p>Build brand awareness in the community and with potential partners</p> <p>Ensure functionality and enhance efficiency of SLSF donations and event registration systems through effective IT solutions.</p>	<ul style="list-style-type: none"> 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. SLSF will order giveaways with the SLSF logo that we will hand deliver to existing sponsors and new contacts. The giveaway will also be used as volunteer gifts. Publicize and maintain the new SLSF website accessible from the NWSRA website 	<p>communications and 5 online outlets</p> <ul style="list-style-type: none"> Send the SLSF Impact bi-monthly Deliver 20 giveaways Complete implementation of new site and publicize through 5 outlets 	
Community Relations				
Goals Completed by: Nanette Cathy	Community Relations	<ul style="list-style-type: none"> The SLSF staff and board will work together to identify 		

SLSF 2017 Foundation Goals

Tracey	<ul style="list-style-type: none"> • Increase the SLSF identity in the communities served by NWSRA 	<p>young professionals and community members that may be interested in serving on an event committee.</p> <ul style="list-style-type: none"> • Partner with an outside firm to promote SLSF as a targeted charity beneficiary. • Nominate volunteers for service awards (IPRA, Kevin T. Kendrigan Spirit Award and other community awards). • SLSF staff members will join or maintain memberships in local service clubs and chambers of commerce 	<ul style="list-style-type: none"> • Identify 3 young professionals and community members • Partner with 1 outside firm to promote SLSF as a targeted charity beneficiary. • Nominate at least 2 volunteers for service awards • Join or maintain memberships in at least 2 local service clubs or chamber of commerce 	
Goals Completed by: Nanette Cathy Tracey	<p>Community Relations</p> <p>Strengthen SLSF Board Member commitment</p>	<ul style="list-style-type: none"> • Discern reasons for Board Members sitting on the board, their individual skills and how to make those skills work on the board. 	<ul style="list-style-type: none"> • Meet with each non park district director board member at least once during 2016 • Maintain a spreadsheet of the board member 	<ul style="list-style-type: none"> • In 2017 NS will meet with all board members. • The spreadsheet is filled in after each

		<ul style="list-style-type: none"> • Enable the SLSF staff to respond to the requests made by board members • Identify current Board Member levels of commitment and promote further opportunities • Identify and reach out to members of the community who would be effective SLSF board members • Encourage SLSF Board Members to maintain or increase their personal commitment to the viability of SLSF. 	<p>responses from the individual meetings</p> <ul style="list-style-type: none"> • Create an individualized Board Member giving analysis to create an annual commitment plan • Identify and reach out 1 community member for board membership. • Host discussions with Board Members on maintaining or increasing their personal commitment at individual Board Member meetings. 	<p>board member meeting.</p> <ul style="list-style-type: none"> • NS will create a board member profile sheet that will be updated annually • SLSF will continue to include information about fundraising best practices at board meetings and in the monthly SLSF Board member updates.
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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 2017

Special Leisure Services Foundation

January 17, 2017	Annual Meeting (Third or Fourth Tuesday due to the IPRA Conference)
March 21, 2017	(Third Tuesday – Strategic Planning Meeting)
May 16, 2017	(Third Tuesday)
October 17, 2017	(Third Tuesday)

December 13, 2017 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.

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.

2017 Calendar of Events

January

Metro Chicago Bocchia Cup Saturday, January 14
School Day Off Special Events Monday, January 16
Partner Bowling Wednesdays, February 15 - May 10
not March 15 and 22

February

Winter Games February 7 - 9
School Day Off Special Events Monday, February 20
Gold Medal Fashion Show Sunday, February 26

March

Spring Day Camp March 27 - 31

April

Partner Bowling Wednesdays, February 15 - May 10
Special Recreation Association Art Show TBD
Spring Games Sunday, April 23
Music Recital Saturday, April 29

May

ID Young Adult Overnight/Aurora May 5 - 6
P/V Adult Overnight/Aurora May 5 - 6
ID Adult Overnight/Aurora May 12 - 13
Buffalo Grove Golf Classic Wednesday, May 17

June

Palatine Hills Golf Classic Thursday, June 1
Summer Day Camp June 13 - August 3, not July 3, 4
Summer Games June 9 - 11

July

Arts in the Park TBD

August

Moretti's/NWSRA Golf Classic
In Memory of Kevin T. Kendrigan Wednesday, August 16
ID Vacation Trip/Los Angeles August 21 - 24
P/V Vacation Trip/Los Angeles August 28 - 31
Women's Golf Outing Thursday, August 31

September

NWSRA Sports Banquet Thursday, September 14
Arlington Classic Golf Outing Thursday, September 14
Partner Bowling .. Wednesdays, September 20 - October 25

October

Terrazzo & Marble Supply Companies
Golf Outing TBD
Halloween Dance Friday, October 27

November

Partner Bowling Banquet Wednesday, November 8
Celebrate Ability Gala Friday, November 3

December

Snowflake Ball Friday, December 8

MEMO:

T0: SLSF Board of Directors
From: Tracey Crawford, Nanette Sowa and Cathy Splett
Date: January 11, 2017
RE: Update on American Philanthropic

On Wednesday, January 11, 2017, the SLSF staff held a conference call with Matt Gerken and Eduardo Andino of American Philanthropic to start the development plan their agency will be creating for SLSF.

During the conference call the following timeline was created:

Date	Action	Players
January 11, 2017	Conf. Call with American Philanthropic	Tracey, Nanette and Cathy
January 11-18, 2017	Complete Development Planning Information Request	Nanette and Cathy
January 19 – February 8, 2017	American Philanthropic creates situation analysis and recommend a strategy	Matt Gerken and Eduardo Andino
February 9, 2017	One Day Goal Planning Session In the morning – Review and clarification In the afternoon – gift table presented with 4-5 core strategies to increase revenue with task timeline	Nanette, Cathy, Tracey, Matt Gerken and Eduardo Andino
February 10 – March 20, 2017	1 st draft of Development Plan will be created with SLSF staff input	Nanette, Cathy, Tracey, Matt Gerken and Eduardo Andino
March 21, 2017 3:30 pm – 6:30 pm	American Philanthropic presents 1 st draft of Development Plan to Board, Committee Members and Staff. Dinner served and location TBA	Matt Gerken and Eduardo Andino, SLSF Board, Committee Members, Nanette, Cathy and Tracey
May 16, 2017	American Philanthropic will present final 2018-2020 Development Plan to SLSF Board	Matt Gerken and Eduardo Andino



AMERICAN PHILANTHROPIC
STRENGTHENING CIVIL SOCIETY

Special Leisure Services Foundation

DEVELOPMENT PLANNING INFORMATION REQUEST

Prepared by American Philanthropic

January 2017

PHILADELPHIA | CHICAGO | PHOENIX

WWW.AMERICANPHILANTHROPIC.COM

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

TEL 302.635.7354 | FAX 302.635.7355

99 of 139





Dear Tracy and Nanette,

To serve you effectively as we begin the strategic development planning process, we need to learn more about SLSF's past and current development program and processes, and your perspective on what your aims are for your development program going forward.

The first step is a request for information related to your current donor base and development activities. We understand that you may not have all of this information and that not every question will be applicable—we don't know what we don't ask. We will work with whatever you can reasonably provide. So do feel free to ignore questions that don't apply to you, or to point us to information that is readily available in other formats—in documents you provide, on the website, etc.

The more thorough we can be at this stage, the better prepared we will be to advise you on how to structure and grow your development program. Answers need not be polished. The aim of this request is to obtain as complete a picture as possible of SLSF's development operations going into our planning meeting.

Once we have reviewed your answers and documents, we will prepare an initial analysis and follow-up questions for review and discussion at an in-person meeting. Discussing these items together will help us analyze the workings of your organization and will inform our recommendations regarding your development priorities going forward.

We look forward to working with SLSF to help you to achieve your mission.

Best regards,

Matt Gerken and Eduardo Andino
American Philanthropic



INFORMATION REQUEST

Development goals:

1. What is your fiscal year?
2. What fiscal years do you want this development plan to cover (typically, we would cover a three year period)?
3. How much revenue do you anticipate needing to raise in each of this plan's years (i.e. \$500,000 in 2017, \$650,000 in 2018, \$800,000 in 2019)?
 - a. How did you come up with these numbers?
 - b. Do these goals take account of the program, marketing, operations, and infrastructure changes you intend to make during each year? For example, do you intend to add new programs or events, expand existing ones, and/or add to your staff?
 - c. On a scale of 1 (not confident at all) to 5 (extremely confident), how confident are you that these fundraising goals (1) accurately reflect your needs, and (2) are realistic?
4. What is your total operating budget for these same years, if different from the above?

Current donor base:

Please provide information on your existing donor base as follows. Where possible, please distinguish between donors and event attendees (for example, someone who has participated in gold events but has not donated beyond the participation fees):

1. Total number of individual donors in database (both current and lapsed, ordinarily defined as those who have not given in the past two years):
2. Total number of individual persons in database who have never donated (if possible, please also categorize these persons—e.g., prospects, event attendees, etc.):
3. Number of **individual** donors, and the total amount of their giving, at the following levels:

Annual giving	# donors last year (FY2015)	\$ amt given last year	# donors this year (FY2016)	\$ amt given this year
\$99 and below				
\$100 to \$499				
\$500 to \$999				
\$1,000 to \$4,999				
\$5,000 to \$9,999				
\$10,000 to \$24,999				
\$25,000+				
Total				



4. What percentage of the individual donors who gave to you in FY2015 also gave to you in FY2016?
5. What percentage of the individual donors who gave to you in FY2014 also gave to you in FY2016?
6. Who are your donors? (ie, how would you describe your typical donor?)
7. Number of **foundation** donors, and the total amount of their giving, at the following levels (including event sponsorships as gifts):

Annual giving	# donors last year (FY2015)	\$ amt given last year	# donors this year (FY2016)	\$ amt given this year
\$99 and below				
\$100 to \$499				
\$500 to \$999				
\$1,000 to \$4,999				
\$5,000 to \$9,999				
\$10,000 to \$24,999				
\$25,000+				
Total				

8. Number of **corporate** donors, and the total amount of their giving, at the following levels (this would include sponsorships of events or the purchase of a table at a gala):

Annual giving	# donors last year (FY2015)	\$ amt given last year	# donors this year (FY2016)	\$ amt given this year
\$99 and below				
\$100 to \$499				
\$500 to \$999				
\$1,000 to \$4,999				
\$5,000 to \$9,999				
\$10,000 to \$24,999				
\$25,000+				
Total				

9. Annual amount, last fiscal year and this fiscal year, and description of any significant development income you receive from any other sources not listed above (e.g., government grants, partner nonprofit groups, etc.):
10. How many donors of any type, total, did you have in FY2016 and what was the total amount of their giving?



11. How many donors of any type, total, did you have in FY2015 and what was the total amount of their giving?
12. Number of donors who have indicated they will be leaving your organization a planned gift:
13. Number of planned gifts you have received by year over the last three fiscal years:

Development messaging and communication:

1. What's your thirty-second "pitch" for SLSF—who you are, what you do, and why it matters?
2. How would you describe your programs and activities to a donor? (In this case, the programs and activities of NWSRA that SLSF supports)
3. Please describe the relationship between NWSRA and SLSF and how that relationship is related to donors.
4. Do you believe that donors understand the relationship between SLSF and NWSRA in the same way as you do? Or do they have a different impression?
5. What do you believe to be SLSF's (or NWSRA's) unique strengths? What does it do better or differently than any other organization?
6. What do you believe to be SLSF's (or NWSRA's) weaknesses? How do you mitigate these with donors?
7. Who are SLSF's "competitors" in your opinion? Is Special Olympics in this category?
8. How have most current donors come to know about and donate to SLSF?
9. What role (if any) does electronic communication (emails, social media, etc.) play in your communications with donors? How often do you email donors, Tweet at them, post on Facebook or Instagram, etc.?
10. Please provide the following website and social media metrics, if applicable:

	Website(s)	Facebook	Twitter	Instagram/Other
Pageviews this year				
Pageviews last year				
Unique visits this year				
Unique visits last year				
Unique visitors this year				
Unique visitors last year				
Likes				



Followers				
-----------	--	--	--	--

11. What percentage of your gifts come in through your website? What was total online giving in FY 2016?
12. Have donors, public figures, or others endorsed your work? If so, could you share these endorsements with us?

Donor cultivation:

1. How many times did you solicit your active donors (i.e., your house file) in the mail last fiscal year? How many so far this fiscal year? Please count “hard asks” only, as opposed to informational mailings about news, events, etc.
 - a. Who is included in these mailings? That is, what are the parameters of your “list pulls” for these mailings?
 - b. How have these mailings performed? If possible, please provide the following data, either on a cumulative or mailing-by-mailing basis, for at least the last two fiscal years:
 - i. Total # units mailed.
 - ii. Total cost of mailing.
 - iii. Total gifts received from mailing.
 - iv. Total dollar amount of these gifts.
 - v. Highest gift received in each mailing.
 - c. Did you test different variables in these mailings? If so, which variables tested best, and which worst?
2. How many times did you communicate with your active donors with non-solicitation mailings (e.g., annual reports, event invites, newsletters, personal cards, etc.) last fiscal year? How many so far this fiscal year?
 - a. What was the schedule of these mailings last fiscal year and this fiscal year? Please describe each mailing and provide examples where possible.
 - b. Who receives these mailings? What are the parameters of your “list pulls”?
3. Do you produce your mailings in-house or work with an outside printer?
4. How do you prioritize your donors for cultivation and outreach?
5. What is your process for thanking donors for gifts? Do your methods here change based on the size of the gift or other factors?
6. For what percentage of your donors do you have research data and profiles in your database? How do you store information about your donors?
7. How many active donors has your board or staff met with in person this year? How many were met with last fiscal year?



- a. Could you break down who generally conducts these meetings by approximate percentage?
 - b. At what percentage of these meetings, approximately, was an “ask” made?
 - c. Are there others within your organization who would be well-suited to meeting with donors but are not currently doing so?
8. Do you have a major donor club or other recognition structure? If so, please describe its levels and benefits (or attach a document that does so).
 - a. How important would you say this club is to how your development prioritizes its time and activities with respect to individual donors, on a scale of 1 (not important at all) to 5 (extremely important)?
 - b. Are the stated club benefits consistently and systematically delivered?
 - c. Are club members mailed using special club letterhead and stationery?
 - d. Do club members receive special communications or treatment not mentioned in the formal club benefits?
 - e. Do you have any data or analyses speaking to the effectiveness of the club?
 - f. When was your club founded?
 - g. Who is responsible for overseeing the club on a day-to-day basis?
9. How many donors gave on a recurring monthly basis last fiscal year and so far this fiscal year? What was the cumulative amount of their giving last fiscal year and so far this fiscal year?
10. Do you have a club or society for monthly givers?
11. How many donor-centered or fundraising events did you hold last fiscal year and so far this fiscal year, including all golf outings?
 - a. Please provide a schedule and description of each event held last year and so far this year, as well as approximate attendance at each.
 - b. What is the approximate proportion of attendees at these events would you describe as personally invested in SLSF/NWSRA, such as active donors or parents of those who benefit from NWSRA services, as opposed to those invited or paid for by others (such as the golf buddies of a board member, employees brought to fill out a company-sponsored table, etc)?
 - c. What was the net amount raised by these events in total, and by event, in each of the last two fiscal years?
 - d. Approximately how much staff time went into executing these events, in total, last year and so far this year?
12. Do you actively solicit planned gifts? If so, what does this entail (e.g., special mailings, ads, featured on website, special seminars, etc.)?
 - a. Who do you typically target for your planned giving outreach?



- b. How do you recognize and cultivate those donors who have indicated they will be leaving your organization a planned gift?
- 13. How often do you communicate with your current foundation supporters, on average?
- 14. How many current foundation supporters did you meet with in person last fiscal year and so far this fiscal year?
- 15. How many lapsed foundation donors did you communicate with last fiscal year and so far this fiscal year?
- 16. How many lapsed foundation supporters did you meet with in person last fiscal year and so far this fiscal year?
- 17. How often do you communicate with your current corporate supporters, on average?
- 18. How many current corporate supporters did you meet with in person last fiscal year and so far this fiscal year?
- 19. How many lapsed corporate donors did you communicate with last fiscal year and so far this fiscal year?
- 20. How many lapsed corporate supporters did you meet with in person last fiscal year and so far this fiscal year?
- 21. Are there other ways not mentioned here in which you solicit, communicate with, and/or recognize your donors and bring them into the life of your organization?

Donor acquisition:

- 1. How often did you specifically and explicitly prospect for new donors through the mail last fiscal year and so far this year? (That is, how many prospecting mailings did you do?)
 - a. Do you send mailings or other communications to families who benefit from NWSRA programs?
 - b. Are you willing to exchange your list of donors or event attendees with other organizations?
- 2. What methods do you use to identify potential new major (individual) donors?
- 3. What methods do you use to identify potential new foundation givers?
- 4. What methods do you use to identify potential new corporate givers?
- 5. Do you have in your database records for new individual, foundation, and corporate prospects that you would like to solicit?
 - a. How many prospects of each type are in your database?
 - b. If these prospects are not in your database, do you maintain some other kind of list?
 - c. Is there a goal, next step, and person responsible assigned to each prospect?
 - d. What tools do you use to identify and research donors and donor prospects (e.g., WealthEngine, DonorSearch, iWave, etc.)?
- 6. What methods and tools do you use to approach major donor prospects (of any type)?



7. Do you track all organizational contact with prospects in your database?
8. How many major donor prospects (of any type) has your board or staff met with in person this year? How many were met with last fiscal year?
 - a. Please break down by individuals, foundations, and corporations, respectively.
 - b. Could you break down who generally conducts these meetings by approximate percentage?
 - c. At what percentage of these meetings, approximately, was an “ask” made?
 - d. Are there others within your organization who would be well-suited to meeting with prospects but are not currently doing so?
9. Do you have a system for asking board members, other donors, or other allies for recommendations regarding donor prospects?
10. How do you prioritize your major donor prospects for cultivation and outreach?
11. Do you “re-prospect” your lapsed major donors by treating them like major donor prospects?
12. Are there other ways not mentioned above in which you identify, approach, and solicit major donor prospects?

Development staffing and operations:

1. About how much did you spend on development-related expenses—including donor mailings, development personnel, donor-related travel, event costs not reimbursed or donated, etc.—last fiscal year? How much is budgeted for this fiscal year?
2. Please list all personnel who are involved in development activities in some way, including full or part time staff, contractors, and board members.
 - a. What role does each play in your development efforts?
 - b. Approximately how much time does each devote to development each week?
3. Do you hold regular meetings focused on fundraising as a whole (as opposed to issues related to specific events or particular fundraising activities)?
 - a. If so, how often?
 - b. Who participates in these meetings?
 - c. What does a typical agenda for these meetings include?
 - d. What reports are regularly reviewed at these meetings?
4. How are NWSRA program and other staff integrated into development, if at all?
5. Who is primarily responsible for the following key development activities?
 - a. Gift entry
 - b. Generating thank you notes
 - c. Donor and prospect research
 - d. Donor and prospect meetings
 - e. Drafting direct mail



- f. Coordinating donor (house file) and prospecting mailings
 - g. Creating foundation and/or major donor solicitation materials such as grant proposals
 - h. Creating donor collateral material
 - i. Calling donors and prospects
 - j. Executing donor events
 - k. Running planned giving program
 - l. Communicating with board members
6. What database do you use to store and track donor information?
 - a. Please provide us with a typical donor record (feel free to make anonymous).
 - b. Please provide us with the donor reports you use most often.
 - c. How effectively would you say you make use of your database, on a scale of 1 (not effectively at all) to 5 (extremely effectively)?
7. What role do your board members play in your development efforts?
 - a. Do you have any plans to grow the size of your board?
 - b. Do all of your board members give to you each year? What is the average gift?
 - c. Is there a give-or-get minimum for your board members?
8. Does your organization have an advisory board (separate from the fiduciary board) of any kind? If so, does this board play a role in development efforts?

Document request:

Please provide the following, if available (may be emailed or uploaded to shared Dropbox folder):

1. Any current or relatively recent internal strategic, development, or operating plan(s)
2. A development calendar or list of regular development activities and their frequency
3. Recent written grant proposals
4. Text from (or copies of) donor mailings that have been sent out in the past one to two years (housefile and prospecting solicitations, non-solicitations)
5. Text from standard thank you notes
6. Donor club materials
7. Planned giving materials
8. Examples of emails sent to email list (solicitations and non-solicitations), if applicable
9. Collateral material used with donors, such as brochures, prospectuses, annual reports, handouts, one-pagers, mailing inserts, etc.
10. A list of all current and lapsed foundation and corporate supporters, with total lifetime giving amounts, date of last gift, and means through which the gift was initiated (Proposal? Direct mail? Personal relationship? Meeting?)
11. Organizational budget for current fiscal year and previous fiscal year
12. Most recent IRS Form 990



13. Most recent financial statements (audit or income statement and balance sheet)
14. Board list with affiliations and staff list
15. Metrics related to the impact and reach of NWSRA programs
16. Any other materials you think may be helpful for American Philanthropic to get an accurate picture of SLSF's development activities and performance

ALL MATERIALS WILL BE KEPT STRICTLY CONFIDENTIAL

From the community: Terrazzo and Marble Supply Companies makes an impact



(From left): NWSRA staff members Nanette Sowa, Cathy Splett, Sherry Gach and T & M employee Rob Schiferl at the 2016 T & M Supply Companies Golf Outing. (Posted by bselders, Community Contributor)

By **Community Contributor bselders**

OCTOBER 11, 2016, 9:04 AM

In 1995, volunteer Rob Schiferl, of Wheeling, IL met Northwest Special Recreation Association (NWSRA) participant John Terrelli (also known as JT) at a NWSRA softball program. Through these programs, individuals with disabilities were paired with volunteers, forming friendships and creating an environment of inclusion. JT, who has an educable mental disability, was partnered with Rob at the softball practices and games. As teammates, they pushed each other to improve their play on the field, while developing a friendship through their passion for softball. Throughout his volunteer experiences, NWSRA participants and staff noticed the passion that Rob had for helping in any way possible and promoting the need for recreation. Rob and John eventually traveled to compete in the Unified Sports World Softball Games, held in Connecticut. This trip of a lifetime strengthened Rob's passion for volunteerism, while enabling Rob and JT to grow their friendship. JT's father, John Terrelli, Sr. stated, "Over the years, Rob and John have remained very good friends, talking about family, work and especially the Cubs. One of JT's favorite memories is when he and Rob played softball together at

Daily Herald
10/24/16
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COURTESY OF JENNIFER FRANKFURTER

Special Leisure Services Foundation supporters Jay and Caroline Schaldecker at the 2015 Celebrate Ability Gala. This year's gala, being held Friday, Nov. 11, in Wheeling, will benefit the expansion of PURSUIT, a collaborative adult day program for adults with disabilities who have transitioned out of high school.

Celebrate Ability Gala helps support adult day program

Submitted by Northwest Special Recreation Association

Highlighting the individual accomplishments of thousands of children and adults with disabilities throughout the Northwest suburbs, the Special Leisure Services Foundation's Celebrate Ability Gala will generate much-needed funds to provide recreational opportunities through Northwest Special Recreation Association.

Funding from the live auction will support the expansion of PURSUIT, a collaborative adult day program for adults with disabilities who have transitioned out of high school.

In 2014, this collaboration between Clearbrook and NWSRA was introduced with much fanfare from the community. The PURSUIT adult day program is structured around four core elements: Recreation and Leisure, Skills and Self Advocacy, Community Integration and Health and Wellness.

The success of this collaboration illustrates the potential of two agencies combining resources and talents to address the specific needs of

community organizations.

Diane Ross, mother of PURSUIT participant Lindsey Ross, stated, "What's best about the PURSUIT program is that Lindsey gets to come here and make new friends and try new activities. I know that she's in a safe place with excellent caregivers."

The mission of SLSF is to support and promote outstanding opportunities through recreation for children and adults with disabilities as the fundraising arm of NWSRA. Through the collaboration between Clearbrook and NWSRA, adults with disabilities have the opportunity to make friends, have fun, go new places, learn new things, be included and celebrate their lives.

The event will be hosted Friday, Nov. 11, at the Wheeling Park District's Chevy Chase Country Club, 1000 N. Milwaukee Ave., Wheeling. The event will begin at 6:30 p.m., and will include a silent auction, raffle, live auction, dinner and dancing. Registration is \$100 per individual.

For information or to register, visit www.slsfala16.es.

From the community: Celebrate Ability Gala supports adult day program

By **Community Contributor** bselders

OCTOBER 18, 2016, 2:14 PM

Highlighting the individual accomplishments of thousands of children and adults with disabilities throughout the northwest suburbs, the Special Leisure Services Foundation's Celebrate Ability Gala will generate much needed funds to provide recreational opportunities through Northwest Special Recreation Association (NWSRA).

Funding from the live auction will support the expansion of PURSUIT, a collaborative adult day program for adults with disabilities who have transitioned out of high school. In 2014, this collaboration between Clearbrook and NWSRA was introduced with much fanfare from the community. The PURSUIT adult day program is structured around four core elements: Recreation & Leisure, Skills & Self Advocacy, Community Integration and Health & Wellness. The success of this collaboration illustrates the potential of two agencies combining resources and talents to address the specific needs of young adults who require services after high school. The program provides unique experiences for its participants through collaboration with local businesses and community organizations.

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The event will be hosted on Friday, November 11 at the Wheeling Park District's Chevy Chase Country Club, 1000 N. Milwaukee Ave., Wheeling, IL. The event will begin at 6:30 p.m., and the event will include a silent auction, raffle, live auction, dinner and dancing. Registration is \$100/individual. For more information or to register, visit www.slsfgala16.gesture.com or contact Nanette Sowa at nsowa@nwsra.org or 847-392-2848, ext. 255.

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

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LATEST» Adult Halloween Treats That'll Make Your House a Must-Visit (<http://patch.com/illinois/buffalogrove/s/fx8lo/adult-halloween-treats-thatll-make-your-house-a-must-visit>)

Bulletin Board (illinois/buffalogrove/bulletinboard)

Celebrate Ability Gala supports adult day program

SLSF will celebrate the accomplishments of children and adults with disabilities throughout the northwest suburbs at its annual Gala.

By NWSRA (Open Post) - (<http://patch.com/users/brian-selders>) October 24, 2016 4:57 pm ET **P** (<http://my.patch.com/article/26746596/edit>)



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SUBSCRIBE

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This post is contributed by a community member. The views expressed in this post are the author's. Registered users are welcome to post on Patch (<https://my.patch.com>).

More from Buffalo Grove Patch (/illinois/buffalogrove)



Incorrect Absentee Ballots Sent to Some Wheeling Township Voters

(<http://patch.com/illinois/buffalogrove/incorrect-absentee-ballots-sent-some-wheeling-township-voters>)

Hiring For The Holidays? Let Patch's New Local Job Listings Help You Staff Up

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"Our aim:
To fear God,
tell the truth
and make money."

H.C. Paddock
1852-1935

Making the effort to care

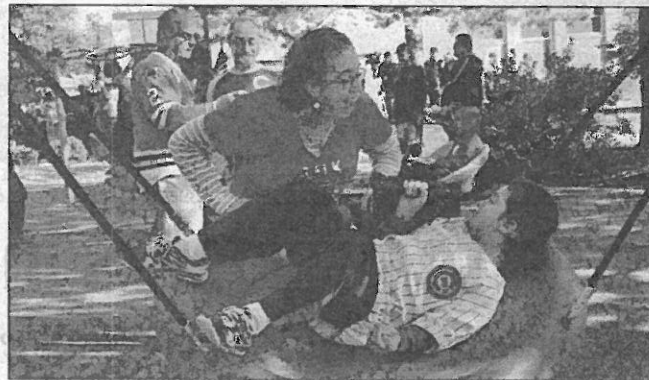
Entire community benefits from facilities like special-needs playground

It didn't be surprising if a
ious Elk Grove Park Dis-
l had been tempted to
a request from Sheri Cap-
dismissed her with vague
to consider her idea.
board didn't.

hed a serious study of
s accessible to children
with disabilities, and
that led to the open-
ing last weekend of a
new \$100,000 all-inclu-
sive playground at the
village's Al Hattendorf

area adds a variety of new
specially designed for
with special needs.

of Elk Grove Village,
before the park board
ie wanted more opportu-
er son with special needs.
rk board voted for it, and
hem, we now have a park,"



Sherri Cappello swings her son Jack on equipment at Elk Grove's new all-inclusive playground at the Al Hattendorf Center.

she told our Bob Chwedyk at the
playground dedication Saturday.

Of course, it wasn't quite so sim-
ple. First, the park district reviewed

its facilities and its population and
determined the need for additional
options. Then it identified pieces of
equipment to add and developed a

plan for the addition.

It's what park boards do, certainly.
Identify needs and find ways to
address them. But it's also especially
gratifying to see organizations will-
ing to commit resources to limited
populations.

The Elk Grove parks study found
500 families who participate in pro-
grams from the Northwest Special
Recreation Association alone, so a
demand for parks services was evi-
dent, but that demand had to be con-
sidered in the context of a commu-
nity of nearly 35,000 residents.

Thankfully, the Elk Grove park
board saw the value of fitting spe-
cial-needs kids into that context. And
it's not alone in such an assessment.
Communities throughout the sub-
urbs are increasingly finding ways to
incorporate kids with special needs
and their families into their planning
and development.

Last May, the DuPage County

Forest Preserve District approved a
new phase in the development of a
sensory garden and playground for
children with special needs in the
Wheaton Park District. Festivals like
Elburn Days, South Elgin's River-
fest Express, Naperville's Ribfest and
countless others make provisions
to ensure that kids with physical
and developmental disabilities can
get into the spirit of celebration and
enjoy their communities' amenities
as much as every other resident.

In a fully inclusive world, such
efforts ought not seem extraordi-
nary, and, to be sure, they're grow-
ing increasingly common in the sub-
urbs. But they also don't come easy
or cheap.

Agencies that provide them
aren't just helping the limited pop-
ulation affected, they're also add-
ing to a caring and welcoming envi-
ronment that benefits their entire
community.

From the community: NWSRA Executive Director Elected to the American Academy for Park and Recreation Administration

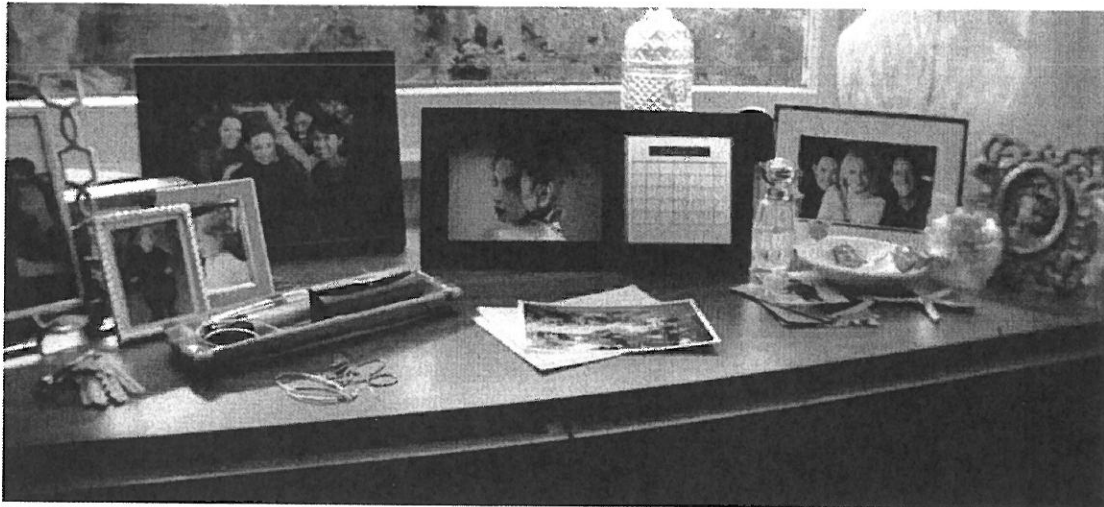
By **Community Contributor bselders**

OCTOBER 20, 2016, 11:44 AM

Tracey Crawford, Executive Director of NWSRA has been elected to the American Academy for Park and Recreation Administration. Crawford was inducted recently at the Academy's Annual Meeting during the National Recreation and Park Association Conference in St. Louis, MO.

The Academy is a group of distinguished practitioners and educators who are leaders in the field of park and recreation. They must have served for at least 15 years in a high level of administration in a park and recreation agency or as a recognized educator in parks and recreation administration or they must manage a park and recreation department for an agency with a population of more than 500,000. They also must have demonstrated outstanding ability in administration, management or education in the profession; displayed broad interest with a direct service benefit to the advancement of public parks and recreation or assumed leadership with a keen desire to contribute to the advancement of the field. The Academy is limited to 125 active members.

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Established in 1980, the Academy was formed to advance knowledge related to the administration of recreation and parks; encourage scholarly efforts by both practitioners and educators to enhance the

practice of park and recreation administration; promote broader public understanding of the importance of parks and recreation to the public good; and conduct research, publish scholarly papers and/or sponsor seminars related to the advancement of park and recreation administration.

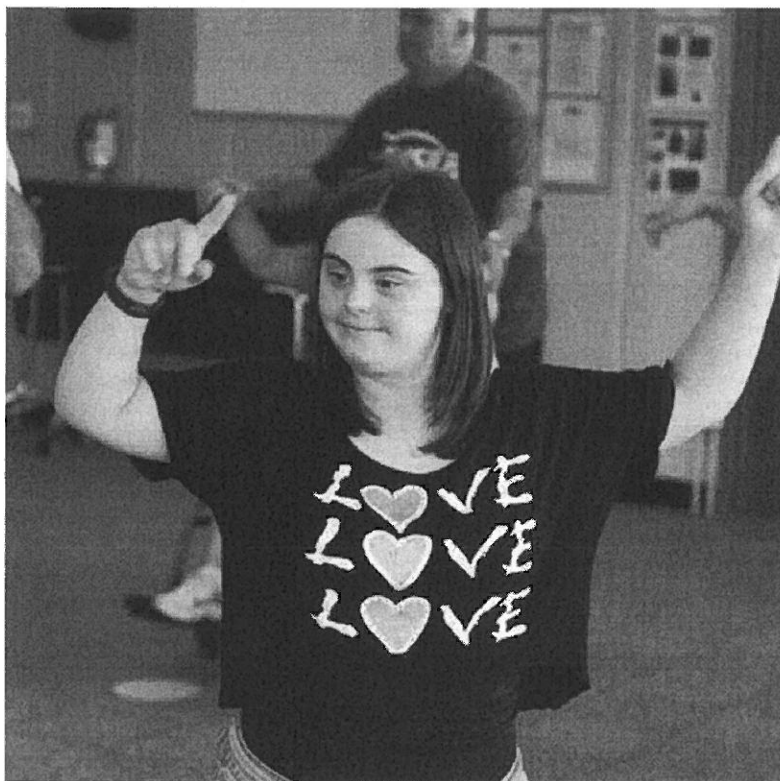
"The Class of 2016 is a great mix," said 2016 President Rebecca Benná of Dayton, OH. "We have urban to small suburban, men and women, varied ages - all with superior career experience and a dedication to improving the quality of life through the provision of high quality parks and recreation opportunities."

More information on the Academy is available at www.aapra.org.

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

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From the community: PURSUIT adult day program expands to Hanover Park



Caption: PURSUIT participant Rachel Giagnoro at the current Rolling Meadows-based program. (Posted by bselders, Community Contributor)

By Community Contributor bselders

OCTOBER 31, 2016, 4:11 PM

Hanover Park, IL: In 2017, two of the largest service providers for individuals with disabilities in the area, Clearbrook and Northwest Special Recreation Association (NWSRA), will expand its PURSUIT Adult Day Program into the Hanover Park community. NWSRA recently completed its Comprehensive Strategic Plan process, and through its Needs Assessment, the community responded overwhelmingly that additional services are needed for adults with disabilities who have transitioned out of high school. The current PURSUIT program, hosted at the Rolling Meadows Community Center, has received much fanfare from the community, and currently has a waiting list that highlights the success of program while making the need for additional services evident. Through the expansion of the collaborative PURSUIT Adult Day Program, Clearbrook and NWSRA look forward to providing innovative programming to more adults who require services.

NWSRA is a partnership of 17 member Park Districts in the northwest suburbs, including western

is structured around four core elements: Recreation & Leisure, Skills & Self Advocacy, Community Integration and Health & Wellness. The success of this collaboration illustrates the potential of two agencies toward combining resources and talents to address the specific needs of young adults who require services after high school. The program provides unique experiences for its participants through collaboration with local businesses and community organizations.

The current program maintains its own community garden, volunteers at senior centers and other locations, assists in fundraising efforts and so much more. Program participants have provided over 860 hours of volunteerism at events including Meals on Wheels, Ronald McDonald House charity work, sorting donations and packing suppers with Journeys from PADS to HOPE, various fundraising events and more. Diane Ross, mother of PURSUIT participant Lindsey Ross, stated "What's best about the PURSUIT program is that Lindsey gets to come here and make new friends and try new activities. I know that she's in a safe place with excellent caregivers."

The program also partners with other organizations to host events like dances, boat trips, cooking days, magic shows and more. PURSUIT has also invited several specialty instructors to teach classes including cooking, computer skills, personal training, soccer, Spanish, ice skating, swimming, professional wrestling, private investigation, dog training and music. In addition, the program has attracted much attention from corporate volunteers and organizations. Volunteers from Zurich NA, Omron, Schneider Electric, UPS and other companies have donated their time and energy to the program.

Through collaborative partnership, this program will serve the needs of adults with disabilities for years to come. For more information on the PURSUIT Adult Day Program, please visit

www.nwsra.org/pursuit or contact Liz Thomas at 847-392-2848, ext. 227 or e-mail lizt@nwsra.org.

About Clearbrook:

Today, Clearbrook serves over 7,000 children and adults with intellectual/developmental disabilities in over 160 communities throughout Chicago and the suburbs. Clearbrook is committed to being a leader in creating innovative opportunities, services and supports for people with disabilities. With a staff of 900+ and more than 50 locations across Chicagoland, Clearbrook reports that 92 percent of every dollar raised goes directly into their programs and services.

About NWSRA:

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Bulletin Board (/illinois/palatine/bulletinboard)

PURSUIT adult day program expands to Hanover Park

In 2017, Clearbrook and NWSRA will expand its PURSUIT Adult Day Program into the Hanover Park Community.

By NWSRA (Open Post) - (<http://patch.com/users/brian-selders>) November 8, 2016 12:13 pm ET **P** (<http://my.patch.com/article/26772472/edit>)

Like 0 Sha

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NWSRA Comprehensive Strategic Plan and through various discussions, the Hanover Park Park District recognized the need for the PURSUIT 2 Adult Day Program, and found facility space to be utilized for the program.

Public school districts in Illinois must cut off their services to individuals with disabilities at the age of 22, leaving many families in desperate need of services with limited financial options. Through the collaboration between the agencies and combining of resources, all costs related to the PURSUIT program, including the facility, staff, and supplies will be fully funded and sustainable for years to come. In addition, the average cost to the participant is much lower in comparison to other similar services throughout the area- approximately \$13,000/year for services 5 days a week. The program is approved by the Department of Human Services (DHS) and participants can use Medicaid Waiver funding to help cover costs.

Currently, Clearbrook, NWSRA and the Hanover Park Park District are working to ensure accessibility of the Hanover Park Community Center, as well as remodeling the program space to accommodate needs. The program will begin intake of applications and performing assessments in Spring 2017, and the program will officially begin operations in Summer 2017. Clearbrook President Carl LaMell stated "The need for PURSUIT to expand into the western suburbs is really critical, and we look forward to serving the needs of residents throughout this area."

This program serves adults with disabilities who have transitioned out of high school and are in need of services. The existing program, held in Rolling Meadows, provides state-certified staff that lead a variety of educational, social and recreational activities within the program. The

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SLSF Celebrate Ability Gala: 6 p.m. Friday, Nov. 11, Chevy Chase Country Club, 1000 N. Milwaukee Ave., Wheeling. Special Leisure Services Foundation, the fundraising arm of Northwest Special Recreation Association, hosts its annual Celebrate Ability Gala. Enjoy live entertainment, raffles, a silent and live auction, dinner and dancing. \$100. Tickets can be purchased by contacting Nanette Sowa at (847) 392-2848, ext. 255, or email nsowa@nwsra.org. Funds raised support accessible transportation, NWSRA programs, inclusion opportunities, NWSRA Lightning athletes and the Kevin T. Kendrigan Memorial Scholarship Program.

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From the community: NWSRA Executive Director Elected to the American Academy for Park and Recreation Administration

By Community Contributor bselders

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Submitted by Northwest Special Recreation Association

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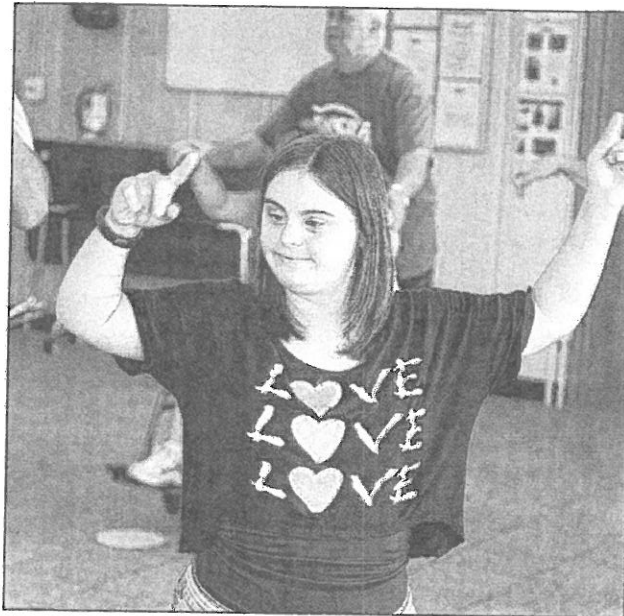
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NWSRA is a partnership of 17 member park districts in the Northwest suburbs, including Western suburban park districts such as Hoffman Estates, Schaumburg, South Barrington, Palatine, Inverness, Streamwood, Bartlett and Hanover Park.

Upon review of the Needs Assessment in the NWSRA



COURTESY OF LIZ THOMAS

PURSUIT participant Rachel Giagnorio at the Rolling Meadows-based program.

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For information on the PURSUIT program, visit www.nwsra.org/pursuit or contact

Liz Thomas at (847) 392-2848, ext. 227, or lizt@nwsra.org.

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Special Leisure Services Foundation is dedicated to supporting and promoting outstanding opportunities through recreation for children, teens, and adults with disabilities in cooperation with Northwest Special Recreation Association. Call 847-392-2848 or visit us at www.slsf.me.

From the community: Astellas USA Foundation Supports Next Generation Technology



The NWSRA Snoezelen(R) Sensory Room creates a therapeutic alliance between the participant and staff through technology.
(Posted by bselders, Community Contributor)

By **Community Contributor bselders**

DECEMBER 1, 2016, 11:50 AM

NORTHBROOK, IL, Nov. 10, 2016 - Imagine a room where a child with Autism can feel safe, or a teenager with Asperger's can relax his mind through a multi-sensory experience, or an adult with Down Syndrome can feel in control and make choices independently. Through technology and innovative design, the Snoezelen® room is a controlled multi-sensory environment that helps to create a therapeutic alliance between the participant and staff as well as a safe place to develop life skills. Astellas USA Foundation recently partnered with Northwest Special Recreation Association (NWSRA) by providing a \$10,000 educational grant that has supported the purchase of various items, including a Bubble Wall Panel, Aura LED Projector, Rocker Glider Chair, Colored Light Spray Strand, Fiber Optic Light Enclosure and more. The Snoezelen® Room will be owned and operated by NWSRA, and located at Rolling Meadows Community Center at 3705 Pheasant Drive, Rolling Meadows.

The main goal of the Snoezelen® room is to enhance sensory stimulation of individuals who have difficulties receiving and responding to sensory input. Stimulation can be increased or decreased to match the interests and therapeutic needs of the individual. Benefits include increased concentration and focused attention, development or reactivation of sense of hearing, sight, smell, touch and taste, improved coordination and motor development (both fine and gross motor), promotion of cognitive development by increased brain function and much more.

"At Astellas USA Foundation, we believe everyone deserves access to the care and therapeutic support they need," said Moyra Knight, president of Astellas USA Foundation. "NWSRA's Snoezelen® room allows children and adults with sensory input disabilities to train and develop their abilities in a friendly, relaxing environment. This technology puts them in control of their disability, and we are proud to support a program that benefits their well being."

Equipment is being purchased now and the room will be utilized beginning in January 2017, and NWSRA plans to host programming in the room from Monday through Saturday during scheduled times. NWSRA Executive Director Tracey Crawford stated "The use of innovative technology and design will open doors for necessary therapy for many children and adults with disabilities for years to come. We are extremely grateful to the Astellas USA Foundation for their support."

About Astellas USA Foundation

Astellas USA Foundation is a tax-exempt, nonprofit corporate foundation that awards grants to support charitable, scientific, literary and educational programs. Learn more at www.astellasusafoundation.org. You can also follow us on Twitter at @AstellasFDN or Facebook at www.facebook.com/AstellasFoundation.

About SLSF:

SLSF is the fundraising arm of NWSRA, raising funds to support scholarships, accessible transportation, inclusion, athletics and general programs. NWSRA is a nonprofit organization that has enriched the lives of children and adults with disabilities throughout 17 northwest suburbs in Chicago by providing outstanding recreational opportunities in a safe, supportive and social setting for over 40 years. NWSRA holds the distinction of Distinguished Accredited Agency from the Illinois Park and Recreation Association, and won the National Recreation and Park Association Excellence in Inclusion Award in 2013 for national leadership in diversity and inclusion initiatives. If you are interested to learn more about NWSRA's programs and success stories, please visit our website: www.nwsra.org, or contact Brian Selders at 847-392-2848.

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

Astellas USA Foundation supports next generation technology

Submitted by Brian Selders

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• Submit 'Your News' at www.dailyherald.com/share.

The NWSRA Snoezelen Sensory Room creates a therapeutic alliance between participants and staff through technology and innovative design.



COURTESY OF BRIAN SELDERS

Daily Herald

dailyherald.com

Children's author visits hometown schools

Submitted by Jan Brottman

Brottman engaged the students of all ages

From the community: NWSRA Hosts Snoezelen Room Ribbon Cutting



NWSRA Executive Director Tracey Crawford (right) cuts the ribbon with Flaghouse Snoezelen Consultant Carolyn Jackson. (Posted by bselders, Community Contributor)

By **Community Contributor bselders**

DECEMBER 12, 2016, 12:51 PM

Rolling Meadows, IL: On Wednesday, December 6, Northwest Special Recreation Association (NWSRA) celebrated a breakthrough in therapy for individuals in the northwest suburbs. A Ribbon Cutting Ceremony was held to recognize the implementation of the state of the art Snoezelen Room at the Rolling Meadows Community Center. Through the collaborative efforts of grantors, donors, volunteers and staff, the room will provide rare opportunities for stimulation, interaction and therapy for individuals in the northwest suburbs. The Snoezelen sensory room is now the first of its kind implemented into a recreational facility in the northwest suburbs of Chicago.

NWSRA Executive Director Tracey Crawford stated "I am just thrilled that we now have the opportunity to make such profound change in the lives of so many, and I extend my heartfelt gratitude to each of our supporters, volunteers, Board Members and staff members for making this possible."

NWSRA has formed the Snoezelen Sensory Team, which will create individualized short and long term

measurable goals for each individual receiving therapy within the room. The equipment within the room will allow for the team of Certified Therapeutic Recreation Specialists (CTRS) trained by Flaghouse on the use of the Sensory Room to provide sensory therapy focusing on leisure awareness, education, physical, affective, cognitive, emotional, linguistic, social and developmental improvements while keeping all sessions "person centered".

NWSRA Superintendent of Recreation Andrea Griffin stated "Through the use of the Snoezelen Room, we look forward to partnering with neighboring private therapy groups, our member park district senior centers, local non-profits that serve veterans and their families and local support groups for children and families facing life crisis situations.

Throughout the year, the fundraising arm of NWSRA, Special Leisure Services Foundation (SLSF) partnered with several businesses and granting organizations. Grants received from Zurich NA, Elk Grove Township, Astellas USA Foundation, Schneider Electric, Rotary Noon Club of Arlington Heights and the Foundation of the Rotary Club of Buffalo Grove raised the necessary funds to purchase the necessary equipment for the room. In addition, individual donations provided funding toward equipment and installation. NWSRA Board Chair and Palatine Park District Executive Director Mike Clark stated "The need for this type of room in the northwest suburbs is evident, and the outstanding support of SLSF made it possible."

The use of the Snoezelen Room will allow NWSRA staff to implement innovative programs that promote Therapeutic Recreation experiences, meeting the growing demands for individualized programming with sensory integration and behavioral needs of participants and families. Due to the collaborative work with member park districts, legislators, fellow nonprofits, organizations, businesses and community members, this room will help to break down the illusions of fear, the walls of anxiety and the floods of panic for many individuals in the northwest suburbs.

About NWSRA:

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This article is related to: [Rolling Meadows](#)

From the community: NWSRA RECEIVES ILLINOIS DISTINGUISHED ACCREDITED AGENCY AWARD



NWSRA staff at the 2016 Pinning Ceremony, recognizing newly certified staff. (Posted by bselders, Community Contributor)

By **Community Contributor** bselders

DECEMBER 15, 2016, 9:46 AM

Rolling Meadows, IL - - The Northwest Special Recreation Association (NWSRA) has been recognized as an Illinois Distinguished Accredited Agency by the Illinois Association of Park Districts (IAPD) and the Illinois Park and Recreation Association (IPRA).

The two statewide associations administer the Illinois Distinguished Accreditation program with the goal of improving the delivery of park and recreation services to Illinois residents. "Illinois has a reputation for the best park districts, forest preserves, conservation, recreation and special recreation agencies in the nation," said Peter Murphy, IAPD President and CEO. "The Illinois Distinguished Accreditation program provides an opportunity for these agencies to undergo a voluntary, comprehensive evaluation process to demonstrate that they have met state guidelines to provide exceptional park and recreation services to their community. The end result is to improve the quality of life for Illinois residents."

"This program gives recognition to park and recreation agencies that go above and beyond in dedicating themselves to offering quality programs and services designed to fulfill their community's needs," said Debbie Trueblood, IPRA Executive Director.

A park district or recreation agency interested in applying for Distinguished Accredited Agency recognition undergoes a detailed, lengthy process of application and evaluation. A Joint Distinguished Park and Recreation Accreditation Committee (JDPRAC) comprised of members from IAPD and IPRA coordinates the process. "Agencies submit a self-evaluation and a formal letter requesting admission into the process," said Penny Randel, IAPD Co-Chair of the JDPRAC. "If the committee determines the agency is eligible to continue the process, we send them an evaluation date."

According to Randel, on the day of the evaluation, the agency presents documented information and gives a tour of pertinent facilities and parks for the evaluation team's review.

The team reviews general management procedures, finance and business operations, facilities and parks, personnel, recreation services, legal documentation and other materials including mission statements, goals and safety manuals.

Upon completion of the evaluation, the agency is notified in writing of the official results within ten days. Agencies that have achieved Distinguished Accredited status are recognized with a plaque at the IAPD/IPRA Annual Conference Awards Luncheon in January.

"There are tremendous benefits for an agency that achieves Distinguished Accredited status," said Dan Jones, IPRA Co-Chair of the JDPRAC. "The agency's application and review process is an excellent self-evaluation and agencies that apply realize increased operational efficiency and effectiveness. Communities can have confidence that their park district or recreation agency employs qualified professionals and has met professional standards."

NWSRA applied for the Illinois Distinguished Accreditation program in March 2015. The JDPRAC approved NWSRA for Distinguished Accredited status in November 2016 and highlighted its employment of certified and professionally trained staff, volunteer recognition program, new Board Member manual, investment policy, in house training, and maintaining of excellent statistics and reports.

In compliance with the program, NWSRA will be reevaluated in six years to verify that they have continued to demonstrate sound management practices in providing quality park and recreation services to the community.

IAPD is a non-profit service, research and education organization that serves park districts, forest preserves, conservation and recreation agencies. The association advances these agencies, their citizen board members and professional staff in their ability to provide outstanding park and recreation opportunities, preserve natural resources and improve the quality of life for all people in Illinois. IPRA is a not-for-profit organization and public interest group who is an advocate in providing quality park, recreation and conservation education, resources and services to professionals and citizens throughout the state of Illinois.

This item was posted by a community contributor. To read more about community contributors, click

From the community: Special Leisure Services Foundation Receives \$5,000 Grant From The UPS Foundation



UPS representative Jim Houser (right) volunteers at the PURSUIT program in Rolling Meadows with NWSRA staff member Liz Thomas. (Posted by bselders, Community Contributor)

By **Community Contributor bselders**

JANUARY 3, 2017, 2:49 PM

Rolling Meadows, IL- (January 3, 2017)- Special Leisure Services Foundation (SLSF), the fundraising arm of Northwest Special Recreation Association (NWSRA), received a \$5,000 grant from The UPS Foundation, which drives global corporate citizenship and philanthropic programs for UPS (NYSE:UPS).

The grant will be used to toward the purchase of computers and technology that will be used at the PURSUIT 2 Adult Day Program. In 2017, two of the largest service providers for individuals with disabilities in the area, Clearbrook and NWSRA, will expand its PURSUIT Adult Day Program into the Hanover Park community. Public school districts in Illinois must cut off their services to individuals with disabilities at the age of 22, leaving many families in desperate need of services with limited

financial options. This program serves adults with disabilities who have transitioned out of high school and are in need of services. The existing PURSUIT program, held in Rolling Meadows, provides state-certified staff that lead a variety of educational, social and recreational activities within the program. The PURSUIT Adult Day Program is structured around four core elements: Recreation & Leisure, Skills & Self Advocacy, Community Integration and Health & Wellness. Through the expansion of the collaborative PURSUIT Adult Day Program, Clearbrook and NWSRA look forward to providing innovative programming to more adults who require services.

SLSF President Tracey Crawford stated "We are very excited to have UPS return as a supporter of SLSF and NWSRA. Their support will provide the necessary tools for adults with disabilities transitioning out of high school to thrive through the use technology in the northwest suburbs of Chicago."

Established in 1951 and based in Atlanta, Ga., The UPS Foundation identifies specific areas where its backing clearly impacts social issues. In support of this strategic approach, The UPS Foundation has identified the following focus areas for giving: volunteerism, diversity, community safety and the environment.

In 2015, UPS and its employees, active and retired, invested more than \$110 million in charitable giving around the world. The UPS Foundation can be found on the web at UPS.com/foundation. To get UPS news direct, visit pressroom.ups.com/rss.

"The UPS Foundation is honored to support the SLSF efforts to provide outstanding programming to adults with disabilities who are transitioning out of high school," said Eduardo Martinez, president of The UPS Foundation and chief diversity and inclusion officer at UPS. "Our goal is to fund powerful programs that make a lasting difference to the global community."

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This article is related to: [High Schools, Rolling Meadows](#)

Pursuit adult day program expands to Hanover Park

Submitted by Brian Selders

In 2017, two of the largest service providers for individuals with disabilities in the area, Clearbrook and Northwest Special Recreation Association, will expand its Pursuit Adult Day Program into the Hanover Park community.

NWSRA recently completed its Comprehensive Strategic Plan process, and through its Needs Assessment, the community responded overwhelmingly that additional services are needed for adults with disabilities who have transitioned out of high school.

Through the expansion of the collaborative Pursuit Adult Day Program, Clearbrook and NWSRA look forward to providing innovative programming to more adults who require services.

NWSRA is a partnership of 17 member park districts in the Northwest suburbs, including Western suburban park districts such as Hoffman Estates, Schaumburg, South Barrington, Palatine, Inverness, Streamwood, Bartlett and Hanover Park.

Upon review of the Needs Assessment in the NWSRA Comprehensive Strategic Plan and through various discussions, the Hanover Park Park District recognized the need for the Pursuit 2 Adult Day Program, and found facility space to be utilized for the program.

Public school districts in Illinois must cut off their services to individuals with disabilities at the age of 22, leaving many families in desperate need of



COURTESY OF BRIAN SELTERS

NWSRA and Clearbrook look forward to expanding the Pursuit Day Program, providing innovative opportunities to young adults with disabilities.

services with limited financial options. Through the collaboration between the agencies, all costs related to the Pursuit program, including the facility, staff and supplies, are fully funded and sustainable for years to come.

In addition, the average cost to the participant is much lower in comparison to other similar services throughout the area — approximately \$13,000/year for services five

days a week. The program is approved by the Department of Human Services and participants can use Medicaid Waiver funding to help cover costs.

Currently, Clearbrook, NWSRA and the Hanover Park Park District are working to ensure accessibility of the Hanover Park Community Center, as well as remodeling the program space to accommodate needs.

The program will begin intake of applications and performing assessments in Spring 2017, and the program will officially begin operations in Summer 2017.

Clearbrook President Carl La Mell stated, "The need for Pursuit to expand into the Western suburbs is really critical, and we look forward to serving the needs of residents throughout this area."

This program serves adults with disabilities who have transitioned out of high school and are in need of services. The existing program, held in Rolling Meadows, provides state-certified staff that lead a variety of educational, social and recreational activities within the program.

The Pursuit Adult Day Program is structured around four core elements: Recreation & Leisure, Skills & Self Advocacy, Community Integration and Health & Wellness. The success of this collaboration illustrates the potential of two agencies toward combining resources and talents to address the specific needs of young adults who require services after high school.

The program provides unique experiences for its participants through collaboration with local businesses and community organizations.

The current program maintains its own community garden, volunteers at senior centers and other locations, assists in fundraising efforts and so much more. Program participants

have provided more than 860 hours of volunteerism at events including Meals on Wheels, Ronald McDonald House charity work, sorting donations and packing suppers with Journeys from PADS to HOPE, various fundraising events and more.

Diane Ross, mother of Pursuit participant Lindsey Ross, stated, "What's best about the Pursuit program is that Lindsey gets to come here and make new friends and try new activities. I know that she's in a safe place with excellent caregivers."

The program also partners with other organizations to host events like dances, boat trips, cooking days, magic shows and more. Pursuit has also invited several specialty instructors to teach classes including cooking, computer skills, personal training, soccer, Spanish, ice skating, swimming, professional wrestling, private investigation, dog training and music.

In addition, the program has attracted much attention from corporate volunteers and organizations. Volunteers from Zurich NA, Omron, Schneider Electric, UPS and other companies have donated their time and energy to the program.

Through collaborative partnership, this program will serve the needs of adults with disabilities for years to come.

For information on the Pursuit Adult Day Program, visit www.nwsra.org/pursuit or contact Liz Thomas at (847) 392-2848, ext. 227, or email

lizt@nwsra.org.

About Clearbrook:

Clearbrook serves more than 8,000 children and adults with intellectual/developmental disabilities in more than 160 communities throughout Chicago and the suburbs. Clearbrook is committed to being a leader in creating innovative opportunities, services and supports for people with disabilities. With a staff of 900-plus and more than 50 locations across the Chicago area, Clearbrook reports that 92 percent of every dollar raised goes directly into their programs and services.

About NWSRA:

NWSRA has enriched the lives of children and adults with disabilities as a partnership of 17 Northwest suburban park districts by providing outstanding recreational opportunities for more than 40 years.

NWSRA holds the distinction of Distinguished Accredited Agency from the Illinois Park and Recreation Association, and won the National Recreation and Park Association Excellence in Inclusion Award for national leadership in diversity and inclusion initiatives.

If you are interested to learn more about NWSRA's programs and success stories, visit www.nwsra.org or contact Brian Selders at (847) 392-2848.

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NWSRA Executive Director Tracey Crawford (right) celebrates the opening of the Snoezelen Sensory Room with Flaghouse Snoezelen Consultant Carolyn Jackson. Through technology and innovative design, the sensory room will provide many therapeutic benefits for individuals with disabilities.



The Oswego and Yorkville chambers of commerce had a dual ribbon cut Valley Fresh Market in Yorkville. Valley Fresh market features gluten free fresh foods and handcrafted chocolates.



Prospect Heights Mayor Nicholas Helmer, Alderman Matt Dolick, Clerk dy Morgan-Adams, Treasurer Rich Tibbits and city staff recently joined Storage Area Manager Liza Koncel and Store Manager Nicole Smith for the opening of the facility.

Special Leisure Services Foundation receives \$5,000 grant



COURTESY OF BRIAN SELDERS

UPS representative and SLSF board member Jim Houser, right, volunteers at the PURSUIT program in Rolling Meadows with NWSRA staff member Liz Thomas.

Submitted by Brian Selders

Special Leisure Services Foundation, the fundraising arm of Northwest Special Recreation Association, received a \$5,000 grant from The UPS Foundation, which drives global corporate citizenship and philanthropic programs for UPS.

The grant will be used to toward the purchase of computers and technology that will be used at the PURSUIT 2 Adult Day Program.

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