Shaping the Foundation of the Future
If we are to be a successful Foundation for the future three things are paramount. We must be Efficient with our resources, Exceptional with our communications and strive for Excellence in all that we do. Our focus must be on cultivating sustainable support, creating widespread visibility, producing record-breaking fundraising levels, and maintaining well-built relationships. Collectively, these tools will assure us the opportunity to reach full development and enable us to be the Foundation of the Future.

Erik A. Cliette
Historically the leadership of Jack and Jill of America Foundation has been replete with great men and women who were passionate, knowledgeable, hardworking, and dedicated to the forward movement of this Foundation. I am honored and humbled to follow in their footsteps and to share their dedication in continuing the Foundation’s legacy of service and development of America’s youth.

In this annual report you will read about how your charitable contributions are used for the benefit of children. What is more, you will learn about some of the new constructs, opportunities and directions we will follow to become a successful Foundation of the Future.

Finally, we are pleased to welcome Mrs. Pier A.H Blake as the Foundation’s new Executive Director. Her talent, compassion and resourcefulness will be invaluable as we move forward in shaping the Foundation of the future. At the same time, we say farewell and thank you to foundation legends immediate past President Grace E. Speights and Executive Director emerita Lucille Hadley.

Sincerely,

Erik A. Cliette

*President, Board of Trustees*
Sustainability

Traditionally, the foundation has viewed supporting a student through his/her first year of college as the viable solution for collegiate success. However, fiscal year 2008 represents a major shift in the Foundation’s thinking on this point. Through our partnership with the United Negro College Fund, the Foundation has moved towards supporting scholarship recipients with a four year academic scholarship. The Foundation’s goal is to move young leaders beyond just college entrance to the more important goal of college completion. Evidence suggests that our shift in thinking is a necessary method for addressing college retention and graduation. Accordingly, beginning in 2009, new United Negro College Fund scholars who are supported by the Foundation will be funded for four years instead of just one. We call “removing the financial barrier that keeps students from completing their college education or obtaining their degree” sustainability.
Fundraising

This annual report is not the first report to spotlight Jack and Jill Mothers’ significant role in the Foundation's financial and operational success. However, when dollars are traced back to their source, we find that Jack and Jill Mothers are directly and indirectly responsible for those dollars getting into our hands. Jack and Jill Chapter fundraisers, member assessments and direct member contributions remain the primary sources of revenue for the Foundation.

However, a bigger and bolder approach to fundraising is on the horizon. As a Foundation of the Future we plan to execute a “Million Dollar Revenue Growth Plan.” This plan is aggressive, but it is one that certainly can be achieved with the help of a very talented and committed Board of Trustees.

Moreover, the Board has studied both old and new opportunities for growing income and has concluded that there are many untapped fundraising opportunities at our door. In the future, there will be a greater emphasis on the Board’s role in attracting new dollars to the Foundation. This change positions us to leverage the relationships and financial ties that are necessary for successful development campaigns.
Visibility

We need the world to know who we are and what great things we do. We can accomplish this in several ways: Revamping our website, distributing our newsletter, providing periodic e-mail blasts and mail campaigns are among the actions on our new communications agenda. Each of these will share the compelling stories about how your dollars contribute to the greatest good and welfare of children. Most of our communications agenda is in motion, but we also need the voices of our Jack and Jill family to help keep our story fresh and in the minds of future Foundation contributors.

Repeating models of success in new locations is being explored. For example, in fiscal year 2008, we saw our solid and collaborative “Loose Change” program speak volumes to our success. It clearly showed our ability to instill in young leaders a strong commitment to philanthropy. Now in its fifth year, the “Loose Change” program has grown from a single idea in one region to programs in all seven of our regions

However, the “Loose Change” program is just one story and the Foundation has many more to share. Stamping our story in the minds and hearts of those who are looking for a home for their charitable dollars is a main priority.
Working Together

The Foundation’s success is also the product of working with a cadre of talented and resourceful people — especially the Jack and Jill Mothers. Jack and Jill Mothers serve on our Board of Trustees. These mothers rally fathers, families, friends and peers to join our board, make donations or lead projects.

Children of Jack and Jill Mothers are among the pool of young leaders that we are developing. Many communities where Jack and Jill Mothers live are the benefactors of our grants, scholarships and awards. In addition, employers of Jack and Jill Mothers often sponsor events that spotlight the Foundation’s great work.

All our relationships, regardless of how big or small, tie back to Jack and Jill Mothers. As we move forward we will continue to recognize Jack and Jill Mothers as the common thread that weaves us to resources and people — moving us to a Foundation of the Future.
## Your Foundation’s Financial Condition

### THE JACK AND JILL OF AMERICA FOUNDATION • STATEMENTS OF FINANCIAL POSITION

**As of May 31, 2008**

<table>
<thead>
<tr>
<th>ASSETS</th>
<th>2008</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total current assets</td>
<td>$ 2,955,479</td>
</tr>
<tr>
<td>Equipment, net of accumulated depreciation</td>
<td>$ 26,133</td>
</tr>
<tr>
<td>Total assets</td>
<td>$ 2,981,612</td>
</tr>
</tbody>
</table>

### LIABILITIES AND NET ASSETS

**LIABILITIES**

- Accounts payable $ 8,181
- Grants and designations payable $ 55,235
  
  **Total current liabilities** $ 63,416

**NET ASSETS**

- Unrestricted net assets - operations $ 210,000
- Unrestricted net assets - investments $ 2,708,196
  
  **Total Unrestricted net assets** $ 2,918,196

**Total Liabilities and Net Assets** $ 2,981,612

### THE JACK AND JILL OF AMERICA FOUNDATION • STATEMENTS OF ACTIVITIES

**For The Year Ended May 31, 2008**

#### UNRESTRICTED NET ASSETS

**OPERATING**

<table>
<thead>
<tr>
<th>REVENUES, GAINS, AND OTHER SUPPORT</th>
<th>2008</th>
</tr>
</thead>
<tbody>
<tr>
<td>Net Contributions</td>
<td>$ 523,445</td>
</tr>
<tr>
<td>Special events and activities</td>
<td>$ 29,283</td>
</tr>
<tr>
<td>Interest and dividends</td>
<td>$ 92,397</td>
</tr>
<tr>
<td>Other</td>
<td>$ 5,912</td>
</tr>
<tr>
<td><strong>Total revenues and gains</strong></td>
<td>$ 651,037</td>
</tr>
</tbody>
</table>

**EXPENSES AND LOSSES**

Program Services:

- Grants and Contributions $ 336,482
- Less: Distributions satisfying designations $(48,372)
  
  **Net Grants and Contributions** $ 288,110

Supporting Services:

- Total supporting services $ 446,515
- **Total expenses** $ 734,625
- Net change in operations $(83,588)

**NON-OPERATING**

- Realized and unrealized losses on investments $(269,980)
- Change in net assets $(353,568)
- Net assets, beginning of year $ 3,271,764
- **Net assets, end of year** $ 2,918,196
Your Foundation’s Leadership

The board is comprised of community leaders, Jack and Jill of America Officers, including the National President and one Youth Member. Board members serve a two year term, with the exception of the youth representative who serves a one-year term.

Executive Board Members

Erik A. Cliette  
President  
Entrepreneur & Owner  
Maid Brigade Manhattan  
Executive Director  
The Harlem Hospital Injury Prevention Program

Elizabeth Espy  
Secretary  
Entrepreneur and Owner  
Events by Elizabeth

The Honorable  
Daryl E. Trawick  
Vice President  
Judge  
Eleventh Judicial Circuit Court

Jacqueline Moore Bowles  
President & CEO  
Creative Marketing Resources, Inc.

The Honorable  
John L. Braxton  
Treasurer  
Judge (Ret.)

Gail Coles Johnson  
Executive Director Human Resources  
AT&T

Kim Mumby Green  
Assistant Treasurer  
Executive Vice President  
Aon Risk Services, Inc.

Mavis Parkman James  
Broker/Owner  
Mavis James Real Estate, Incorporated

Alice L. Peoples  
President Elect  
Assistant Director  
University of Michigan Ross School of Business Executive Education

Shelley Cooper  
Computer Instructor/Technology Coordinator  
St. Agnes Catholic School
Trustees

Monica Blake
President & CEO InAction Enterprises, Inc.

Valeska L. Buie
Vice President

Shirley J. Mathis Carter
Learning & Development Manager
Avis Budget Group

Brenda Lacy-Davis
Vice President Corporate Human Resources
AltraBiofuels

Christine M. Govan
Vice President
Investments UBS Financial Services Inc.

Faye Jacobs
Director-Independent
Life Services
New Hanover County Dept. of Aging

Sharon Bourges-Jones
Trustee

Kim Mumby Green
Executive Vice President
Aon Risk Services Inc.

Debra Hairston
Federal Government Sales Manager
Ford Motor Company

Gwendolyn Smith Iloani
President & CEO
Smith Whiley & Company

Karen Walker Johnson
Executive Director
Evercare

Melissa Lindler
Grants Associate/District Scheduler
Office of Congressman James E. Clyburn (SC-06)

Menelik Tafair
Youth Representative

Grace E. Speights
Immediate Past President, Ex-Officio,
Partner-Morgan, Lewis & Bockius

Sheryl Sutherland Viot
Attorney

Valeria G. Wells
President
As You Wish Event Marketing & Design Consultants
BACKGROUND

Jack and Jill of America Foundation, Inc. was founded in 1968 as the philanthropic arm of Jack and Jill of America, Inc. The Foundation is a 501 c(3) charitable organization. Consequently, contributions made to the Foundation are tax deductible.

SCHOLARSHIPS, GRANTS, & AWARDS

National Scholarship

National Project

Jacqueline Robinson Regional Competition

Independent Proposal Competition

Violet D. Greer Teens/Associates Competitive Grant

Special Projects Award

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Shaping the Foundation of the Future