



**NORTHERN TRUST CHARITABLE TRUST**

2014 ANNUAL REPORT



**Northern Trust**



As Northern Trust celebrates our 125<sup>TH</sup> anniversary, we take pride in knowing that good corporate citizenship has been a part of our heritage from the beginning. The “Northern Trust story” is not only about providing innovative solutions to our clients, but also being a reliable source of funds for the charities and civic organizations we support, even during the most challenging of financial environments. In return we receive the rewards that come from building better connections with the communities we serve, providing important educational opportunities and seeing the quality of life improve for so many.

FREDERICK H. WADDELL  
CHAIRMAN AND CHIEF EXECUTIVE OFFICER  
NORTHERN TRUST CORPORATION

## OUR MISSION: REACHING OUT TO LOCAL COMMUNITIES

As part of Northern Trust’s broad philanthropic vision, the Northern Trust Charitable Trust was established in September 1966 to support not-for-profit organizations in Cook County, Illinois. The Trust’s primary focus is to reach out to people in the Chicago area who are in need or face obstacles that impede their full participation in society. At Northern Trust we are fortunate to continue a long-standing tradition of sharing our success by reaching out to our neighbors and enriching the communities we share.

## CORPORATE SOCIAL RESPONSIBILITY STATEMENT

Since our inception, Northern Trust has aligned our efforts with our guiding principles of service, expertise and integrity. We are dedicated not only to meeting the needs of our clients and shareholders, but giving back to the communities we serve. Volunteerism. Philanthropy. Sound business practices and ethics. And a conservation-minded approach to protecting the environment. All of these comprise our corporate social responsibility. All are integral to our culture of caring, now and in the future. A commitment to this culture means we view our clients as partners. And it means that by turning money into good works, we extend a helping hand to those who can’t care for themselves. We proudly advocate corporate citizenship, philanthropy and support for the diverse communities and environments in which we operate.



Northern Trust has been committed to giving back to the community since its inception. Along the way, we have partnered with other organizations that also contribute to the stability and vibrancy of this great city known as Chicago.

- Adler Planetarium – 1930
- Ann & Robert Lurie Children’s Hospital -1882
- The Art Institute – 1893
- Brookfield Zoo - 1934
- Chicago Community Trust – 1914
- Chicago History Museum – 1856
- Chicago Public Library - 1873
- Chicago Symphony Orchestra – 1891
- Field Museum – 1933
- Lincoln Park Zoo – 1868
- Mercy Home for Boys and Girls - 1887
- Morton Arboretum – 1922
- Museum of Science and Industry – 1933
- Ravinia Festival – 1904
- Salvation Army of Metropolitan Chicago - 1905
- Shedd Aquarium - 1929
- United Way of Metropolitan Chicago – 1932
- YMCA of Metropolitan Chicago – 1932





These guidelines outline the Northern Trust Charitable Trust’s priorities for funding. Programs outside the scope of the guidelines explained here will not be considered for funding. The Northern Trust Charitable Trust grants average \$15,000 per year-long cycle. Contributions will support program, general operating, capital or endowment priorities. Grants from the Northern Trust Charitable Trust may be awarded for three consecutive years, with one year off before an organization is eligible to apply again. General operating and program grants are not renewed automatically; capital or endowment grants can be multi-year commitments.

## GUIDELINES OF THE NORTHERN TRUST CHARITABLE TRUST

The Northern Trust Charitable Trust supports organizations that serve Chicago’s Humboldt Park, Logan Square, West Town, Loop, Englewood, Chatham and Washington Park communities. Grants are usually confined to programs and agencies that focus on advancing the well-being of disadvantaged women, children and people with disabilities in one of four core areas.

### Enriching Neighbors

The Northern Trust Charitable Trust supports effective organizations working to measurably improve the quality of life in our focus communities. Health, basic human needs and community development programs provide invaluable support to people who face obstacles that impede their full participation in society. The Northern Trust Charitable Trust gives priority to organizations that:

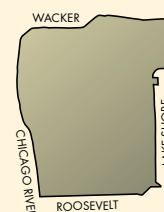
- Provide affordable and supportive housing – particularly those focusing on family housing and housing for people with disabilities;
- Provide quality accessible healthcare; and
- Support basic human needs.

### Preserving the Environment

To help strengthen the stewardship efforts of organizations working to preserve the environment, the Northern Trust Charitable Trust supports programs that:

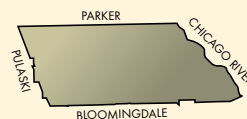
- Incorporate elements of green construction into affordable housing initiatives and
- Create green job training programs for disadvantaged women and people with disabilities.

#### CENTRAL

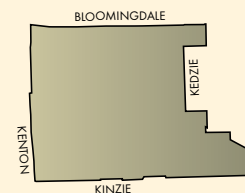


LOOP

#### NORTHWEST



LOGAN SQUARE

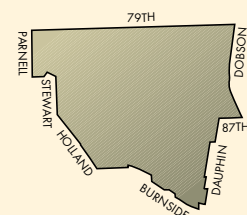


HUMBOLDT PARK

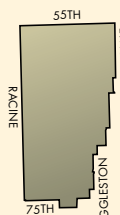


WEST TOWN

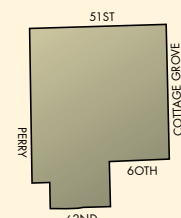
#### SOUTH



CHATHAM



ENGLEWOOD



WASHINGTON PARK

## Impacting Education

Education is a cornerstone to success. The Northern Trust Charitable Trust is committed to supporting organizations that bring innovative, comprehensive and exemplary programs to Chicago's public school students. We believe that by augmenting the priorities and goals of Chicago Public Schools, we are giving the students in our focus neighborhoods additional tools to help strengthen their academic achievement and leadership development. The Northern Trust Charitable Trust gives priority to organizations that:

- Improve student achievement through innovative programming;
- Develop the talent of teachers and principals; and
- Prepare students to compete globally.

## Sharing the Arts

Arts and culture programs play a key role in the development of vibrant and healthy communities. By supporting organizations that bring opportunities to our focus communities, the Northern Trust Charitable Trust is helping to create forums for social interaction to celebrate diversity and heritage. The Northern Trust Charitable Trust supports Chicago-area arts and cultural organizations that:

- Open access to the city's cultural life and
- Integrate the arts into education and other community outreach initiatives.

## MEETING THE NORTHERN TRUST CHARITABLE TRUST CONTRIBUTION REQUIREMENTS

Organization requests must meet specific requirements to be considered for contributions. Following are examples that do not meet the Northern Trust Charitable Trust criteria.

- Organizations located outside the specified Chicago neighborhoods
- Individuals, including those seeking scholarships or fellowship assistance
- Organizations without 501 (c) (3) tax-exempt status
- Organizations/agencies that receive five percent or more of their funding from the United Way
- Research/disease advocacy groups (or their local affiliates)
- Fraternal groups
- Fundraising events
- Advertising or marketing activities
- Political, labor or fraternal organizations or civic clubs; this includes advocacy, government agency and political entities
- Religious organizations for sectarian purposes
- Individual pre-K through 12 schools (public or private)
- Sports, athletic events or athletic programs
- Travel-related events, including student trips or tours
- Development or production of books, films, videos or television programs
- Memorial campaigns
- Organizations less than two years old
- Multi-year operating requests

## ONLINE APPLICATION PROCESS

New applicants (those that have not received funding in the preceding 12 months) must submit an online letter of inquiry to Northern Trust's Community Affairs division at [northerntrust.com/charitabletrust](http://northerntrust.com/charitabletrust) at least six weeks before application deadlines listed at right. After receiving an invitation to apply for a grant, please follow the checklist below to complete the application process.

Current grant recipients that have been funded in the last 12 months and are seeking renewed support do not need to submit a letter of inquiry, but must complete the application process. To apply online, please visit [northerntrust.com/charitabletrust](http://northerntrust.com/charitabletrust).

### APPLICANT CHECKLIST

Complete the online Northern Trust Charitable Trust application form, making sure that all requested information is provided. In addition, be sure to upload the following information with the completed online application.

- A copy of your organization's IRS 501(c)(3) notification letter
- Your organization's operating budget and specific project budget if applicable
- Financial information for the previous two years, with an audited financial statement
- A list of Chicago-area corporate and foundation contributors and the amount each contributed in the last year and the current year
- Current list of board members, with affiliations
- A list of the organization's management staff and their qualifications



## DEADLINES

Applications, including all material specified in the checklist, must be received online before 5:00 PM Central Time on the deadline date. Deadlines for requests for funding are determined by area of service, as follows:

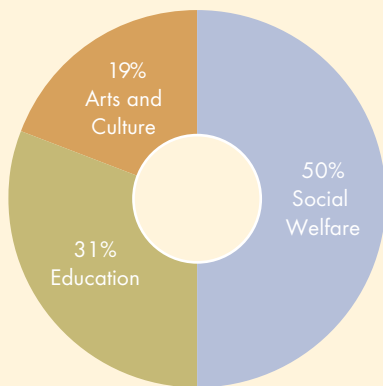
	LETTER OF INQUIRY DEADLINE*	COMPLETED APPLICATION DEADLINE**
<b>Social Welfare Programs</b>	11/13/14 6/18/15	1/2/15 8/6/15
<b>Education Programs</b>	3/5/15	5/7/15
<b>Arts and Cultural Programs</b>	3/5/15	5/7/15

\* Letters of inquiry need only be submitted by new applicants (those that have not received Charitable Trust funding in the preceding 12 months).

\*\* Applications must be received by 5:00 PM CST on date listed.

Applications are reviewed in late March, July and October. Questions about grant application procedures should be directed to [Northern\\_Trust\\_Charitable\\_Trust@ntrs.com](mailto:Northern_Trust_Charitable_Trust@ntrs.com) or by phone at 312-557-1917.

### CHICAGO AREA



## MAKING A DIFFERENCE

In 2014, the Northern Trust Charitable Trust made grants totaling \$2 million to organizations in Chicago in the areas of arts and culture, education and social welfare. These grants, made to nearly 130 organizations, provide critical programming to low- and moderate-income families working to build better lives and communities. Nearly 10% of funding from this fund supported capital and endowment campaigns.

Our long time support of the United Way of Metropolitan Chicago continued with a campaign that raised more than \$3.7 million of which approximately \$2.7 million came from our employees. Outside of Chicago, Northern Trust employees in more than 50 locations contributed an additional \$534,000 to United Way chapters.



**FOCUS ON OUR COMMUNITY**  
 Northern Trust supports a variety of social welfare and educational programs that help people help themselves. Envision Unlimited, pictured above, provides services that promote choice, independence and community integration to people with developmental disabilities and other special needs.

**2014 CHARITABLE TRUST CONTRIBUTIONS**

**SOCIAL WELFARE**

- A Better Chicago**  
Program Support
- Access Community Health Network**  
Program Support
- Accion Chicago**  
Operating Support
- Access Living of Metropolitan Chicago**  
Operating Support
- AIDS Foundation of Chicago**  
Operating Support
- Beacon Therapeutic School, Inc.**  
Program Support
- Bickerdike Redevelopment Corporation**  
Program Support
- Cabrini Green Legal Aid Clinic, Inc.**  
Program Support
- CASA of Cook County**  
Program Support
- Cathedral Counseling Center**  
Operating Support
- Cathedral Counseling Center**  
Capital Support
- Catholic Charities of the Archdiocese of Chicago**  
Program Support

- Center For Economic**  
Operating Support
- Chicago Children’s Advocacy Center**  
Program Support
- Chicago Children’s Advocacy Center**  
Capital Support
- Chicago Rehab Network**  
Operating Support
- Children’s Research Triangle**  
Program Support
- Childserv**  
Program Support
- Community Counseling Centers of Chicago**  
Operating Support
- Deborah’s Place**  
Operating Support
- Emergency Fund**  
Program Support

**Envision Unlimited**  
 Operating Support  
*Above*

- Erie Family Health Center, Inc.**  
Program Support

- Esperanza Community Services**  
Operating Support
- Executive Service Corps**  
Program Support
- Friend Family Health Center, Inc.**  
Program Support
- Greater Chicago Food Depository**  
Program Support
- Hadley School for the Blind**  
Operating Support
- Hamdard Center for Health and Human Services**  
Program Support
- Heartland Alliance for Human Needs & Human Rights**  
Operating Support
- House of the Good Shepherd**  
Program Support
- i.c. Stars**  
Operating Support
- Illinois College of Optometry**  
Program Support
- Illinois Facilities Fund**  
Operating Support
- Jewish Vocational Service**



Operating Support

**La Casa Norte**

Operating Support

**Ladder Up**

Program support

**Lakeview Pantry**

Operating Support

**Latin United Community Housing Association**

Operating Support

**Latin Women In Action**

Operating Support

**Lawyers' Committee for Better Housing**

Operating Support

**Metropolitan Family Services**

Operating Support

**Metropolitan Planning Council**

Program Support

**National Able Network**

Operating Support

**Neighborhood Housing Services of Chicago**

Operating Support

**New Moms, Inc.**

Program Support

**PCC Community Wellness Center**

Operating Support

**Polish American Association**

Operating Support

**Primo Center for Women and Children**

Operating Support

**Rebuilding Together Metro Chicago**

Program Support

**Schwab Rehabilitation Hospital**

Program Support

**SGA Youth & Family Services**

Operating Support

**Spanish Coalition for Housing**

Program Support

*Below*

**Teen Living Programs**

Program Support

**The Cara Program**

Program Support

**The Night Ministry**

Operating Support

**The Salvation Army**

Operating Support

**The University of Chicago**

Program Support

**Thresholds**

Program Support

**Uhlich Children's Advantage Network**

Capital Support

**Women's Business Development Center**

Operating Support

**YMCA of Metropolitan Chicago**

Operating Support

**Youth Job Center of Evanston**

Program Support

**EDUCATION**

**After School Matters**

Operating Support

**Big Brothers-Big Sisters of Metropolitan Chicago**

Program Support

**Boundless Readers**

Program Support

**Boys & Girls Clubs of Chicago**

Operating Support

**Buildon, Inc.**

Program Support

**FOCUS ON OUR NEIGHBORHOODS**

Northern Trust supports organizations and agencies that promote affordable and supportive housing initiatives. The Spanish Coalition for Housing seeks to enrich neighborhoods by providing access to affordable, quality housing in underserved communities across Chicago.



**Center for Companies That Care**

Program Support

**Chicago Arts Partnerships in Education**

Operating Support

**Chicago Child Care Society**

Program Support

**Chicago Commons Association**

Program Support

**Chicago Communities in Schools**

Operating Support

**Chicago Public Library Foundation**

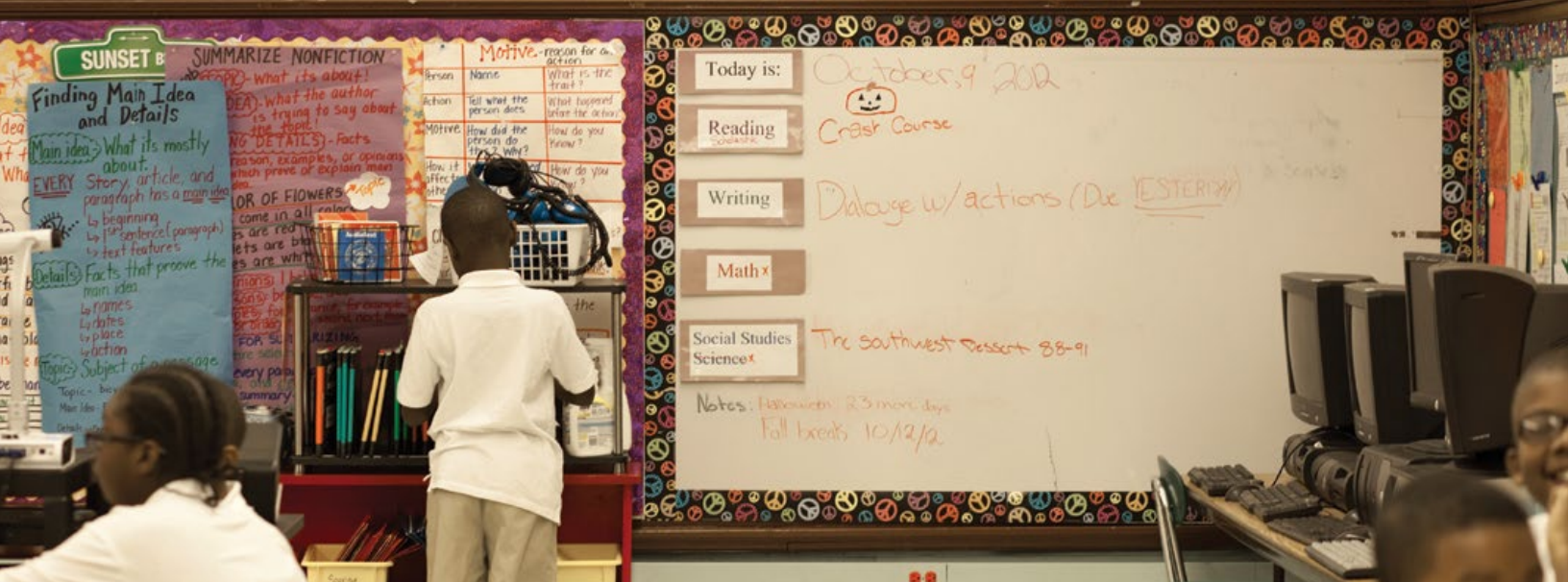
Program Support

**Chicago Scholars Foundation**

Program Support

**Chicago Youth Programs, Inc.**

Program Support



## FOCUS ON OUR CHILDREN

Northern Trust supports organizations that explore ways to expand instructional opportunities beyond the regular school day. The Chicago Debate Commission partners with Chicago Public School students to assist them with developing tangible skills such as critical thinking, evidence based argumentation and research. This program serves a combination of 70 middle schools and high schools throughout the City of Chicago.

### Children's Home & Aid Society of Illinois

Program Support

### Constitutional Rights Foundation Chicago

Program Support

### Demoiselle 2 Femme, Nfp

Program Support

### East Village Youth Program

Program Support

### Erie Neighborhood House

Program Support

### Experience Corp

Program Support

### Golden Apple Foundation

Program Support

### Hephzibah Children's Association

Program Support

### High Jump

Program Support

### Holocaust Memorial Foundation of Illinois

Operating Support

### Illinois Network of Charter Schools

Operating Support

### Innovations for Learning

Program Support

### Kohl Children's Museum

Program Support

### Mission of Our Lady of Mercy

Program Support

### New Leaders for New Schools

Operating Support

### Noble Network of Charter Schools

Operating Support

### OneGoal

Operating Support

### Ounce of Prevention Fund

Capital Support

### Ounce of Prevention Fund

Program Support

### PBS Foundation

Program Support

### Project Syncere

Operating Support

### Reading in Motion

Program Support

### The Associated Colleges of Illinois

Program Support

### The Chicago Debate Commission

Operating Support

Above

### The Chicago Public Education Fund

Capital Support

### The Posse Foundationn

Program Support

### Tutoring Chicago

Operating Support

### University of Illinois

Operating Support

## ARTS AND CULTURE

### Art Encounter

Program Support

### Chicago Children's Museum

Program Support

### Chicago Shakespeare Theater

Program Support

### Chicago Youth Symphony Orchestra

Program Support

### Court Theatre Fund

Program Support

## FOCUS ON OUR ARTS AND CULTURE

Northern Trust supports an array of Chicago-area arts and cultural organizations. Fifth House Ensemble is a versatile and dynamic group who are pioneers in the art of narrative chamber music. Their innovative programs engage audiences through their connective programming and unexpected performance venues.

### **Fifth House Ensemble**

Program Support

*Above*

### **Free Spirit Media**

Operating Support

### **Chicago Theatre Group**

Program Support

### **Hubbard Street Dance Chicago**

Program Support

### **Joffrey Ballet**

Program Support

### **Lyric Opera**

Program Support

### **Marwen Foundation**

Operating Support

### **Merit School of Music**

Operating Support

### **Music Institute of Chicago**

Program Support

### **National Museum of Mexican Art**

Program Support

### **Snow City Arts**

Operating Support



### **Steppenwolf Theater**

Program Support

### **Morton Arboretum**

Operating Support

### **Writers Theatre**

Program Support

### **Writers Theatre**

Capital Support

### **Young Chicago Authors**

Operating Support



Northern Trust