The Family Tree

Executive Committee Meeting
January 12, 2021
12:00 p.m. – 1:30 p.m.
2108 North Charles Street

TFT leads Maryland in preventing child abuse, connects caring communities and builds strong families to improve society for generations to come.

AGENDA

I.	Mission Moment -Stacey Brown	12:00 -12:10 pm
II.	Approval of October 13, 2020 Minutes – Sally Bauer	12:10 -12:15 pm
III.	President's Report – Sally Bauer A. An Evening to Give Thanks B. 30th Annual Great Chefs' Dinner	12:15 -1:00 pm
IV.	Executive Director Search-Sally Bauer & Charlene Moore	1:00 -1:10 pm
V.	Executive Director's Report – Pat Cronin A. FY 21 Performance Update B. Public Policy Agenda C. FY22 Planning	1:10 -1:20 pm
VI.	Brief Committee Report Finance and Facilities Committee	1:20 -1:30 pm Chris Johnson/Phil Saracino
VII.	Closing Remarks—Sally Bauer	1:30 pm

SAVE THE DATE!!

Tuesday, January 19th at 5:30 pm – General Board Meeting Zoom
Tuesday, March 23, 2021 – Noon, Executive Committee
30th Annual Great Chefs' Dinner TBD

Executive Committee
Tuesday, October 13, 2020 12:00 p.m. – 1:30 p.m.
MINUTES

MEMBERS PRESENT: Stephanie Adler, Steve Shaw, Gary Marino, Sally Bauer, Kyle Gore, John Meyerhoff, Tom McDonald, Jeanne Aarsand, Sarah Woods, Stephanie Woodhouse, Chris Johnson, Tom Peltier, Charles M. Roebuck, Stephanie McCormick, Charlene Hayes

MEMBERS EXCUSED: Tom Hauser

STAFF PRESENT: Pat Cronin, Mary Francioli, Stacey Brown, Jennifer Elam, Phil Saracino, Erik Weber

AGENDA OVERVIEW:

TFT leads Maryland in preventing child abuse, connects caring communities and builds strong families to improve society for generations to come.

I.	Mission Moment	Pat Cronin
II.	FY 20 Audit Overview	K.L. Hoffman & Co, P.C
III.	Approval of May 26, 2020 Minutes & Job Description	Sally Bauer
IV.	President's Report	Sally Bauer
V.	Executive Director's Report A. FY2020 Impact B. FY 2021 Plan C. Strategic Planning Process- FY22-24	Pat Cronin
VI.	Brief Committee Reports (finalize) 1. Development Committee 2. Nominating & Governance 3. Finance and Facilities Committee 4. Marketing & Public Relations	 Gary Marino/Tom Peltier Steve Shaw/Kyle Gore Chris Johnson Stefanie Woodhouse/ Sarah Woods
VII.	Closed Session	Sally Bauer

Important Dates:

General Board Meeting Tuesday, **October 20, 2020 at 5:30pm – Zoom**

Brent A. Rosenberg—Lace Up to End Child Abuse: **October 24th –November 1, 2020 Virtual**

An Evening to Give Thanks: **Thursday**, **November 19, 2020- Virtual**

Next Executive Committee Meeting – **Tuesday, January 12, 2021 at 12pm**

Recorder: Jennifer Elam

ISSUE #1 – Welcome
SUMMARY OF DISCUSSION:
Sally welcomed the group and advised that we would be starting with the Auditor's Presentation.

ISSUE #2 –FY20 Auditors Presentation
SUMMARY OF DISCUSSION: Tom Klein showed PP Presentation (filed with minutes). Tom thanked all the board for all their dedication to The Family Tree during this difficult year. He reported a 'clean' audit; and believes TFT will still be here in June 2021. Reviewed total assets $7,600,000.00: Investment 38%, Grants 16%, 26% cash, 1% other, 19% property. Broken down even further, net assets 88%, accounts payable 5% and 7% in PP Notes.

If everything stayed the same, no more income, we could be good at 45 weeks. Some organizations have a lot higher than this, so very unlikely that funders would look at us and think that we are hoarding too much money. This is including cost minus depreciation.

Total Revenue, $3,329,200.00 Special events 18%, Government funds 44%, other 5%, and 33% from contributions and grants. Total Expenses, $4,247,900, 76% programs, fundraising 11%, General Management (salaries, etc.) is 13%. Notable is TFT's necessary fundraising expense which we need to continue to fundraise to keep up afloat.

Questions & Comments: Phil –Finance and Facilities approved of this audit, line by line.
In explanation of the variance of revenue vs expense, Phil noted that $900k were released in the current year to offset some of the apparent loss. We "spent" money that was donated/booked in previous years. In addition, we will be applying for "forgiveness" for PPP loan ($530k). Tom Klein says we can prove already that we are eligible. M&T portal opens up tomorrow.

In response to TFT's relative performance versus other comparative organizations, Tom believes TFT is one of the best organizations that he has seen in his career. He is very impressed by all our hard work for maintaining its mission especially during these challenging times.

ISSUE #3: Approval of May 26th Minutes and Review of Job Description
SUMMARY OF DISCUSSION: Sally received approval board's approval of the both last meetings minutes as well as the Financial Audit that was just discussed.

ISSUE #3: President's Report
SUMMARY OF DISCUSSION: Sally acknowledged everyone's hard work during this time and can't wait for the day to see everyone in person. We have had several major donors for GC event lately, someone gave $50k. Sally acknowledged that this was a very difficult enhanced audit. 10 staff are working in the building each day, and we are very grateful for everything they are doing to keep us going! We have secured meeting with Charles T Bauer Charitable Foundation, really hoping to get them to support us again. Mary said we have been able to have several personal conversations with people during this time. People are excited to hear about what we are doing during this Covid era.

Date confirmed for Great Chefs' – April 26, 2021. Sally thanked John and Lenel Meyerhoff for agreeing to be co-chairs of the event. Becky and Ashton Newhall have agreed to join the Meyerhoffs. We are currently looking to confirm a third chair. Already $325k already raised, so wonderful how far ahead we are. We are assuming now we are going to have it at The Grand Lodge, however, if necessary, we will do outside, and 3rd option will be doing virtual again. Linwood is confirmed as our Guest Chef. There was some discussion about moving the date to later in spring; committee acknowledged the difficulty coordinating schedules with co-chairs.

Evening to Give thanks will be a virtual event on Nov 19th, asked everyone to out on their calendar. Many organizations are going events like this virtually, Graul's will agree to pies, people are wanting to help! People think that this year is more important than ever. Our three prestigious awards will be given: Zeke

Cohen- Meyerhoff Public Service; M&T Bank, Sherman Mission Maker; and, Kirsten Ericksson, Miles & Stockbridge, Kirk Volunteer.

ISSUE #4: Executive Director's Report
SUMMARY OF DISCUSSION: Pat presented two performance dashboards on the screen: end of FY2020 and first quarter projections. Pat summarized operation plan (filed with minutes): 1) Family Connects Maryland: reported we received $720k over 2.5 years grant from MSDE to build capacity of FCM at Sinai to Baltimore County which will include adding two RNs. FCM is going through our first re-credentialing among a small group of early adopters. New rules require us to hire a Medical Director (consultant) who we have identified (a physician from Hopkins) whom we will introduce soon. 2) We also received United Health Care grant to help serve more participants in both Prince George's and Baltimore Counties. 3) Kids Care Plus is transitioning to include a learning support hub for families with young school age children; 3) Reaching families through technology continues to be a priority. Pat mentioned Erik is now working part-time. We are trying to reserve his time for higher level tasks so we can continue to achieve our goals.4) Baltimore City Child Care Resource Center has been chosen by the state to pilot a shared learning program which is a strategy to build business capacity of child care providers. 5) With regard to Advocacy Day, we are told that the General Assembly will be very different this year, we will not have our annual day in Annapolis. We will be working with advocates to seek passage of the Hidden Predator Act- elimination of statute of limitations for child sexual abuse.

Pat reminded the committee that we were in the final year of our three -year plan which parallels three-year request for support. Discussion regarding next steps as to whether we would craft a one plan or three. Sally suggested that we should all talk about this more in depth and Pat thanked the group.

Pat also announced that George Sherman had a serious accident this summer. He is currently in a rehab center in Philly. Betsy asks for prayers. Mary will send out the Sherman's address for those who would like to send a card, etc.

ISSUE #4: Brief Committee Report's
SUMMARY OF DISCUSSION:

- **Finance and Facilities Committee**: Deferred until next General Board Meeting due to insufficient time for closing session.
- **Marketing & Public Relations**: Deferred until next General Board Meeting due to insufficient time for closing session.
- **Development Committee:** Board solicited appeals are going out this month. Please respond to Connie when she reaches out. Gary mentioned Lace Up (fliers in packet). Stephanie Woodhouse asks to please spread the word, sign up, get a group, give money, etc. Raised $35k so far with a goal of $100k. There have been a lot of people we don't know that have signed up and created teams, which is very exciting.
- **Nominating and Governance Committee**: Continuing to go through the list of people to come into the board. Have been pushing for larger minority of people and more powerful organizations in Baltimore. Rich Rosa at Verdence Capital Advisors is interested in joining the Board. Defer other discussion.

Sally asked for TFT staff to exit the meeting so that the closed session could begin.

Great Chefs' Options for FY 2021

Assumption 1: People will be reluctant to attend a large event until we have herd immunity. The Governor's plan does not have the public immunized until Phase 3, estimated April/May of 2021 Therefore, a typical spring GC Dinner will not be possible. Any decision we make will follow guidelines from the Governor of Maryland and CDC.

Financial Overview
GC Revenue in FY21 Budget: $800,000 net

Sponsors	$702,000
Tickets	$ 9,000
Live	$100,000
Silent Auction	$ 50,000
Donation	$ 6,000
Fund a Need	$ 40,000
TOTAL	**$907,500**
Expenses	$100,000
Net Expenses	**$807,500**

Raised to date in sponsorships: $350,000
Left to raise in sponsorships: $352,000

Scenario 1: Move Date for 30th GC Dinner to the Fall of 2021, date TBD and location would be outside. Hold 31st GC Dinner in April 2022. Two events in one fiscal year, but two calendar years. Solicit sponsorships this winter and hope to get a majority confirmed before the end of June.

Pros:
1. Celebrate the 30th GC safely
2. Celebrate Linwood Dame as our Guest Chef
3. Ability to confirm some support before the end of June
4. New Expenses will not hit FY21

Cons:
1. Donor fatigue having the events so close.
2. Risk not achieving our GC revenue goal. Will not be able to book revenue from silent auction, live auction, fund a need in FY21. **Est. $190,000.**
3. May miss out on booking any sponsorships that come in stating July 2021. We think we could raise $220,000 of the $352,000 left to raise. That leaves **Est. $132,000 at risk.**
4. Three events in proximity – Famfest (June), GC (Sept), Lace Up (Oct)
5. Risk of losing current GC Chair
6. Old Expenses will hit FY21 - $30,000.

Scenario 2: Skip GC in 2021, instead launch a major donor program campaign that would allow us to make up some revenue from not having Great Chefs', have the 30^{th} in April 2022.

Pros:

1. Chance to raise the $426,000 to reach our goal for GC
2. No expenses

Cons:

1. No identified leadership
2. No guarantee that funds can be raised
3. Risk of losing current GC chair

Scenario 3: Have a virtual 30^{th} GC Dinner in the Spring

Pros:

1. Safely gather to celebrate the 30th

Cons:

1. Will not achieve our fundraising goals – no live auction, questionable Fund a Need.
2. We have already done this once. It would need to be very different than last year.
3. We will not be able to honor Linwood like we would with a typical dinner.

POLICY AGENDA 2020-2021

Maryland's future prosperity requires the healthy development of our children. When we invest upstream in public policies and programs that build strong families and supportive communities, we are securing the safe, stable and nurturing environments that all children need. All Marylanders must play a role in providing supportive and nurturing environments where children thrive. The Family Tree advocates for the following policy priorities, which help to support families and are essential for Maryland's future prosperity.

- **Expand access to evidence-based home visiting and parenting education programs to parents and caregivers**
  Evidence based parenting education, whether delivered in home or in a group setting, has been shown to prevent child abuse and neglect.

- **Invest in evidence-based programs to prevent child sexual abuse**
  Research shows that the two most effective ways to prevent child sexual abuse are through education and training focused on adults and programming focused on skills training in children.

- **Expand access to high-quality early childhood programs**
  Access to affordable, supportive early childhood programming reduces parental stress, and having access to high-quality child care is associated with fewer symptoms of maternal depression. Both parental stress and maternal depression are risk factors for child abuse and neglect.

- **Implement paid family leave**
  Paid family and medical leave is associated with significantly higher rates of maternal and infant health, reductions in hospitalizations for abusive head trauma, and lower rates of family stressors and risk factors.

- **Increase family economic security**
  Empowering families to meet their basic needs of food and shelter by strengthening household financial security is proven to reduce the risk factors for child abuse and neglect by helping to establish a stable household – two factors that can help protect children from abuse and neglect.

- **Prioritize Primary Prevention**
  The inclusion of primary prevention activities will increase the capacity of state governments to implement and scale up effective interventions aimed at preventing child abuse and neglect from happening in the first place.

The Family Tree works closely with our statewide partners to support policies that strengthen families and prevent child maltreatment. Our policy priorities align with recommendations from the Centers for Disease Control and Prevention (CDC) Technical Packages to Prevent Violence, including the Essentials for Childhood framework and preventing Adverse Childhood Experiences (ACEs).

For more information about our policy priorities, please contact Pat Cronin, Executive Director, The Family Tree, pcronin@familytreem

A KIDS COUNT® POLICY REPORT

KIDS, FAMILIES AND COVID-19

PANDEMIC PAIN POINTS AND THE URGENT NEED TO RESPOND

THE ANNIE E. CASEY FOUNDATION

CONTENTS

INTRODUCTION

In the years after the Great Recession, data on children and families in America showed steady improvement in economic well-being, education and health, although progress in some areas had plateaued, and racial and ethnic disparities persisted.

Then the coronavirus hit.

The pandemic has claimed more than 281,000 lives as of the first week of December in the United States and millions worldwide, with a devastating toll on communities of color.[1] It has isolated us from loved ones and caused widespread economic damage. Millions of Americans have lost their jobs and, with them, a reliable source of income, health care and a sense of stability. Many have weighed whether to risk their health by going to work to keep food on the table and head off foreclosure or eviction. And with schools going online and child care centers closing, parents have had to balance educating and caring for their children in unprecedented ways.

Amid this turmoil, the nation entered a historic chapter of reckoning — as the death of George Floyd, and far too many before and after him, spurred renewed calls for racial equity and justice — and endured the tumult of a contentious election.

Much about the future remains unknown, but it is certain that children, families and communities will struggle to respond to these health and economic crises. In the middle of a pandemic, every child needs the basics. In the richest nation in the world, kids should not go hungry or endure illness without treatment or live on the brink of homelessness. Parents may not be able to send them to school in person, but we all need to make sure kids are learning.

The events of 2020 have exposed holes in the safety net of programs and policies designed to catch kids and families in free-fall moments like these. Moreover, the devastating and disproportionate effects of the pandemic on communities of color have made it clear that the national response to this current situation must address the racial inequities long highlighted by the Annie E. Casey Foundation in its *KIDS COUNT® Data Book* and other publications.

This KIDS COUNT policy report examines how households with children are faring during the pandemic, based primarily on weekly surveys conducted by the U.S. Census Bureau in domains similar to the ones used in the *Data Book:* health, economic well-being, community and education. These data reveal critical pain points for children and families in terms of health (insurance coverage and depression) and economic distress (hunger and housing instability).

To succeed, families must have good health, both physical and mental, and the health care to maintain it; food and the money to buy it; safe, stable housing and communities; education and the means to access it; and quality child care, without which many parents cannot work. The Great Recession taught us that responses in a crisis are uneven and inequitable without intentional remedies built into public policy. To that end, this report offers recommendations for federal, state and local decision makers, who must prioritize children and families in response efforts. The nation's well-being depends on ensuring all kids can thrive in a post-pandemic world.

ABOUT THE DATA

Unless indicated, data in this report are drawn from the U.S. Census Bureau's Household Pulse Survey, conducted most weeks between April 23, 2020, and the publication of this report. Specifically, these data are Population Reference Bureau estimates from the surveys spanning Sept. 16 to Oct. 12, 2020. The survey queried one adult in the household (age 18 and older) and asked whether children lived in the household. Household Pulse Survey data described in this report are for respondents who reported having one or more children in the household. Racial and ethnic data are not mutually exclusive. The categories of African American, Asian and two or more races and other race include Hispanics and non-Hispanics. The Latino category includes people who identified as being of Hispanic, Latino or Spanish origin. American Indian or Alaska Native, Pacific Islander and Native Hawaiian respondents are included in the other race category.

CHILD WELL-BEING BEFORE THE PANDEMIC

Even before the pandemic, millions of children were growing up in families who were unable to meet their most basic needs. In 2019, 12 million children were living in poverty, and 4.4 million had no health insurance.[2]

Racial and ethnic disparities were also endemic. For example, 14% of American Indian children, 9% of Latino kids and 18% of documented immigrant children lacked health insurance, compared to the national average of 6%.[3,4] Nearly a third of African American and American Indian children and nearly a quarter of Latino children lived in poverty, compared to 10% of white, Asian and Pacific Islander kids.[5]

Child well-being had shown slow but steady improvement from the period just after the Great Recession, but there were already troubling signs that progress had halted or reversed. One example: The share of children without health insurance ticked up to 6% in 2019 from 5% in 2018.[6] In short, more recent gains for kids since the recession appeared to be tenuous even before the coronavirus crisis took hold in the United States.

HEALTH AND HEALTH CARE DURING THE PANDEMIC

A lack of health insurance constitutes a critical vulnerability and pain point for any family, for both health and economic reasons. This was the reality for one in eight households with children (12%) in the fall of 2020 (see Table 1). Although the share of children without coverage during the pandemic is unknown, children's well-being naturally depends in part on the health of their parents or guardians, and children are more likely to have insurance if their parents do.[7] The extent of the challenge varies by state, largely due to policy choices. More than one in six households lacked health care in Georgia (21%), Texas (21%) and Oklahoma (17%) (see Table 1).[8]

The survey results reflected significant racial and ethnic differences in access to health care. Nearly a quarter (23%) of Latinos and 14% of African Americans, as well as 20% of adults of two or more races and other race, indicated that they lacked insurance, compared to 8% of white and 7% of Asian adults with young children (see Table 2).

Lacking insurance — and limiting contact with the outside world — families are forgoing the care they need, putting parents, children and young people at risk. More than a third of people with children in the household (34%) reported that they had delayed getting medical care in the previous month.[9]

Mental health, already a pressing issue for young people, has become an acute concern for millions in 2020, as they deal with everything from uncertainty and isolation to the profound grief associated with the coronavirus-related deaths of family and friends. One in five people in households with children (21%) reported feeling down, depressed or hopeless in the previous week, indicating a widespread need for access to mental health care and treatment. Although there was variation among states, at least one in seven people expressed these sentiments in every state and the District of Columbia.[10]

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Table 1: Percentage of Adults With Children in Household Reporting Concerns During Pandemic: Sept. 16–Oct. 12, 2020

	Sometimes or Often Do Not Have Enough Food to Eat	Slight or No Confidence in Paying Rent or Mortgage On Time	Currently Do Not Have Health Insurance	Felt Down, Depressed or Hopeless
United States	14	18	12	21
Alabama	15	15	8	21
Alaska	14	17	16	22
Arizona	12	16	15	23
Arkansas	14	19	9	23
California	15	20	12	25
Colorado	11	12	7	19
Connecticut	14	20	6	19
Delaware	16	18	6	16
District of Columbia	13	19	12	23
Florida	16	23	15	20
Georgia	15	20	21	21
Hawaii	10	22	7	22
Idaho	11	13	11	18
Illinois	14	20	10	18
Indiana	16	19	11	20
Iowa	14	21	6	20
Kansas	15	16	14	19
Kentucky	16	19	10	24
Louisiana	18	23	13	26
Maine	7	12	5	18
Maryland	15	18	8	21
Massachusetts	10	19	7	20
Michigan	15	15	7	22
Minnesota	8	11	8	15
Mississippi	20	23	16	27
Missouri	14	16	12	22
Montana	14	13	10	20
Nebraska	9	13	9	15
Nevada	17	24	13	26
New Hampshire	10	12	7	15
New Jersey	9	19	10	14
New Mexico	20	18	11	27
New York	14	23	6	22
North Carolina	19	18	16	21
North Dakota	6	15	12	14
Ohio	15	16	7	19
Oklahoma	13	15	17	25
Oregon	12	13	11	24
Pennsylvania	15	16	10	27
Rhode Island	18	23	8	25
South Carolina	10	14	14	17
South Dakota	12	11	9	14
Tennessee	11	18	13	20
Texas	16	20	21	22
Utah	7	12	9	20
Vermont	11	10	5	22
Virginia	13	16	11	19
Washington	9	12	8	19
West Virginia	17	16	11	25
Wisconsin	13	14	9	21
Wyoming	11	15	14	20

Source: Population Reference Bureau's analysis of the U.S. Census Bureau's Household Pulse Survey (week 15 and week 16).

Note: Only respondents who provided a valid response are included.

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Table 2: Percentage of Adults With Children in Household Reporting Concerns During Pandemic by Race and Ethnicity: Sept. 16–Oct. 12, 2020

	Total	African American	Asian	Latino	White (non-Hispanic)	Two or More Races and Other Race
Sometimes or Often Do Not Have Enough Food to Eat	14%	23%	9%	19%	10%	23%
Slight or No Confidence in Paying Rent or Mortgage On Time	18%	31%	16%	26%	12%	26%
Currently Do Not Have Health Insurance	12%	14%	7%	23%	8%	20%
Felt Down, Depressed or Hopeless	21%	23%	16%	23%	20%	28%

Source: Population Reference Bureau's analysis of the U.S. Census Bureau's Household Pulse Survey (week 15 and week 16).

Note: Only respondents who provided a valid response are included. Racial and ethnic groups represented in this table are not mutually exclusive. The categories of African American, Asian, two or more races and other race include both Hispanics and non-Hispanics. The Latino category includes people who identified as being of Hispanic, Latino or Spanish origin. American Indian or Alaska Native, Pacific Islander and Native Hawaiian respondents are included in the other race category.

ECONOMIC STABILITY DURING THE PANDEMIC

Uncertainty and instability were already a daily reality for millions of families. Lost jobs and income since March have destabilized millions more, as they can no longer guarantee their ability to keep a roof over their kids' heads and put dinner on the table. And parents who have been able to continue working face a different challenge: finding quality, reliable child care when early childhood centers around the nation have closed, some permanently.

In a prosperous country such as the United States, housing instability is a deeply unsettling reality. More than one in six people with children living in the household (18%) said they had only slight confidence or no confidence at all that they would be able to make their next rent or mortgage payment on time. And this is a problem in every region of the country, with 20% or more of adults with children reporting housing instability in 13 states, including the four largest ones — California, Texas, Florida and New York.

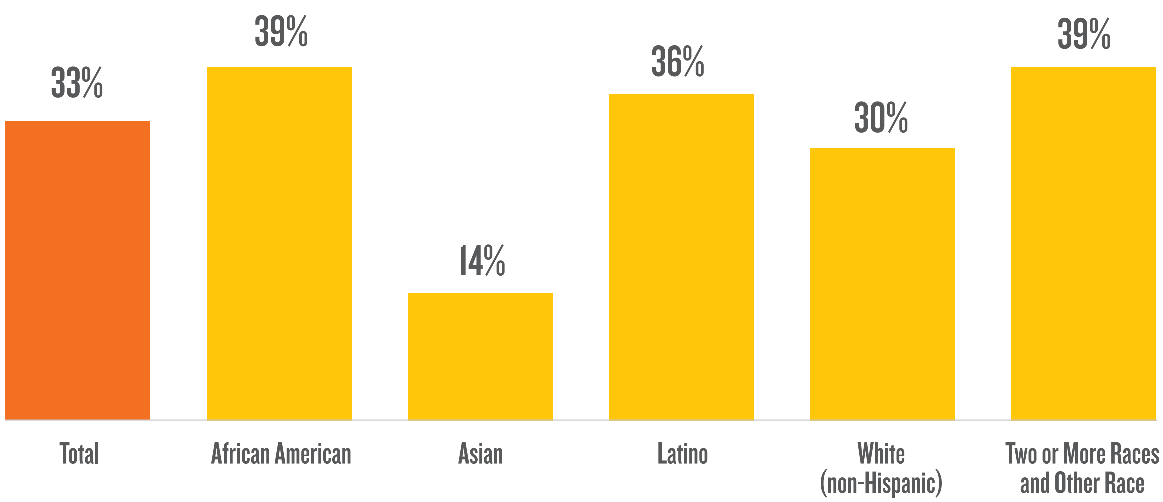
Without action to prevent an eviction and foreclosure crisis, the data also point to a looming housing catastrophe for communities of color: 31% of African Americans, 26% of Latinos, 26% of individuals of two or more races and other race and 16% of Asians felt they were on the verge of failing to pay their rent or mortgage.[11] The rate for white households was 12%. In addition, 33% of people in households with children said they were likely to lose their home to foreclosure or eviction, with higher figures for Black (39%), two or more races and other race (39%) and Latino (36%) households (see Figure 1).

Food insecurity, already a problem for more than one in 10 households before the pandemic, has also increased, and the figures for families of color are particularly high. Overall, 14% of adults with children reported that in the most recent week during the crisis, their household sometimes or always did not have enough to eat. The percentages for Black (23%), two or more races and other race (23%) and Latino (19%) households with children were all about double those for white (10%) and Asian (9%) households.

Although funding for the federal Supplemental Nutrition Assistance Program increased early in the pandemic, and many schools eventually developed pickup or delivery meal programs,[12] hunger among children during this crisis is likely explained in part by school closures. About 29 million kids eat free or reduced-price lunches at school each day during the academic year; 14.7 million eat free or reduced-price breakfast.[13] Food insecurity appeared somewhat more acute in the South and Southwest, home to the four states with the highest rates.

Figure 1: One-Third of Adults With Children Are Likely to Lose Their Home

Percentage of Adults With Children Who Are "Likely" to Have to Leave Their Home Due to Eviction or Foreclosure by Race and Ethnicity: 2020



Source: Population Reference Bureau's analysis of the U.S. Census Bureau's Household Pulse Survey (week 15 and week 16).

Note: Data are for renters/homeowners who owe rent/mortgage payments and are not caught up on payments. Only respondents who provided a valid response are included. Racial and ethnic groups represented in this figure are not mutually exclusive. The categories of African American, Asian, two or more races and other race include both Hispanics and non-Hispanics. The Latino category includes people who identified as being of Hispanic, Latino or Spanish origin. American Indian or Alaska Native, Pacific Islander and Native Hawaiian respondents are included in the other race category.

Figure 2: Latino Adults With Children Are the Most Likely to Not Return to the Labor Force

Percentage of Adults With Children Who "Somewhat or Strongly Agree" They Are Less Likely to Return to Work Due to Lack of Child Care by Race and Ethnicity: 2020

Source: Washington University in St. Louis, Social Policy Institute's 2020 Socioeconomic Impacts of COVID-19 Survey (administered Aug. 10 through Sept. 2, 2020).

Note: N=997 adults with children who are in school or too young for school (excludes those who selected "not applicable"). Results for American Indians, Alaskan Natives and Pacific Islanders are not available due to sample size limitations.

*Data are for non-Hispanic respondents with children.

The COVID-19 crisis has presented an additional challenge to people's ability to earn money to ensure their kids have food and shelter. Working parents depend on early childhood education to nurture their young children, but the pandemic dramatically disrupted child care throughout the nation, with centers forced to close and many parents left scrambling for alternatives. These closures caused the greatest hardships for more than 55 million essential workers[14] in health care, transportation, agriculture, energy and other vital sectors who could not work from home.

Family members such as grandparents and parents who were laid off have provided care, as have employed parents who have had to juggle their children's care and education while working from home. Meanwhile, the child care workforce itself, made up largely of women of color and immigrants,[15] has faced uncertainty in terms of income — median pay in the field was just $11.65 per hour even before the pandemic[16] — and health and safety.[17] Funding for child care providers included in early federal relief bills helped mitigate some damage, but long-term concerns remain.[18]

A third of adults with young children told Washington University in St. Louis they are less likely to return to work because they lack child care (32%). Whether these parents are finding such care is no longer available, they can no longer afford it or they themselves have been thrust into additional caregiving roles, an enormous portion of the nation's workers could be sidelined from being able to support themselves and their families (see Figure 2).[19]

EDUCATION DURING THE PANDEMIC

Virtually all schools in the United States closed for at least part of the spring. By the fall, conditions varied widely, with some children attending school in person, others learning remotely and still others following hybrid calendars. This state of affairs raises serious concerns about children's ability to learn during the coronavirus pandemic, as many contend with little instructional time, shifting class schedules, limited access to computers or the internet and home environments that may not be conducive to learning.

Indeed, many kids have found it difficult to be successful under these conditions. Half of the adults in households with school-aged children surveyed by Washington University in St. Louis (49%) said there was no adult available in the household to help their children with schoolwork, 36% were unable to provide their kids with a quiet place to study and 32% lacked adequate broadband internet and online learning tools.[20]

POLICY RESPONSE TO THE PANDEMIC

The United States is enduring the most catastrophic economic crisis since the Great Depression. This time, however, the nation is also in the midst of a public health disaster that has not spared a single community. Schools have been disrupted so profoundly that the effects could damage the prospects of an entire generation of young people. And widening racial disparities require policymakers to prioritize equitable solutions. To help get families through this crisis, we need decisive action.

ECONOMIC WELL-BEING

Families who lack financial stability cannot fully support their children or provide the opportunities necessary to foster their development. Parents need not only jobs with steady, family-sustaining pay but also affordable housing in a stable community and the ability to save for the future. All these dimensions of economic well-being have been affected by the pandemic.

The federal Temporary Assistance for Needy Families (TANF) program enables states to provide short-term support to families with children in poverty. It is the only program that provides cash assistance to help meet children's basic needs when families face exceptional crises. But many observers believe the program, which is nearly 25 years old, is long overdue for significant improvements, and the pandemic is shining a spotlight on its shortcomings. TANF serves fewer families in need than ever: In 2019, only 23% of families with kids in poverty received TANF assistance, down from nearly 70% at the program's inception in 1996.[21] Moreover, design flaws limit the ability of TANF to provide more aid whenever national economic distress is greater, reducing the program's effectiveness as a tool to respond to the current crisis.[22]

Additional TANF requirements at the state level create more barriers to aid for struggling parents. For instance, 13 states deny additional assistance to kids born to parents who are already enrolled in the program, retaining a mechanism rooted in racial stereotypes that pushes those families deeper into poverty.[23] TANF also was meant to encourage work, a worthwhile aim, but education and training do not always count toward eligibility requirements, despite the fact that these activities can put parents on the path to better employment prospects. This moment presents an opportunity to reimagine TANF to meet the needs of children in poverty and give families tools to achieve financial stability during and after the pandemic.[24]

TANF is one of several policy tools that are not being used to their fullest potential. Two more are the federal Earned Income Tax Credit (EITC) and Child Tax Credit (CTC), which deliver additional resources to eligible households where people are working but still struggling to make ends meet. Combined, these tax credits helped lift 5.5 million children out of poverty in 2018 and provided another 6.4 million with additional resources.[25] But many more families who could make use of the EITC and CTC are not able to, or may do so only to a limited extent, because of the policies' design. For example, the families of 27 million children do not receive the full CTC because their incomes are too low to qualify for the entire credit.[26]

A number of positive actions this year demonstrate that leaders can take steps to make a difference for families. The Coronavirus Aid, Relief and Economic Security (CARES) Act provided an unprecedented $1.8 trillion in support to families, businesses and state, local and tribal governments, and the Families First Coronavirus Response Act guaranteed that most individuals would not bear the costs of COVID-19 testing. These relief packages unquestionably prevented conditions from deteriorating further.

The pandemic caused the national unemployment rate to spike, peaking at 14.7% in April.[27] However, federally funded, expanded unemployment insurance stabilized many families on the verge of financial collapse and created an extraordinary stimulus effect, boosting incomes by an estimated total of $842 billion.[28] Without this decisive federal action, millions of layoffs would have immediately translated into catastrophic amounts of lost income for countless families.

Through these efforts, we have learned some lessons that could ensure our policy solutions are more effective and produce more equitable results. In some states, fewer than 20% of unemployed workers received any support before the pandemic, and those excluded were disproportionately workers of color.[29] Unemployment insurance did not rescue everyone who lost a job; many workers were ineligible or unable to claim it, and some families' needs exceeded the temporary support. Expanding eligibility to include contract, gig and other workers would help more people weather gaps in income. In addition, more states should consider adopting a modest allowance for each child in a household. Twelve states have already done this. Even providing families with an extra $5 to $15 per week per child — as Iowa now offers, for example — would help parents make sure their children have enough food to eat.[30]

EDUCATION

A quality education is essential to a child's success and our nation's competitiveness. Yet states cut $24 billion from school budgets in a single year after the onset of the Great Recession, and not equitably, with the funding gap more than tripling between low-poverty and high-poverty school districts. There will be similarly enormous pressure on state budgets in 2021.[31,32]

More than half of all students in the United States attend schools that are highly segregated — i.e., at least three-quarters white or at least three-quarters nonwhite. Research shows that nonwhite school districts get $23 billion less than white districts, despite serving the same number of students. This disparity is largely due to the legacy of school and neighborhood segregation.[33] Education and civil rights advocates have urged Congress to build maintenance-of-equity provisions into any federal school relief bills, which require states to shield high-poverty schools from greater-than-average cuts and publicize disaggregated data on staffing reductions.[34]

Researchers have estimated that school systems need to spend 100% to 200% more per student from a low-income family and 100% to 150% more per English language learner in order to provide every student with the opportunity to achieve success. Yet some states provide as little as 10% more, in part because of heavy reliance on property taxes to fund schools.[35]

Additionally, equity policies in local school districts are a potentially powerful tool needed now for creating environments in which all kids can thrive. Equity policies serve as a guidepost for the work of a district and can provide the framework for how to embed a focus on racial equity in areas such as instruction, curriculum, discipline and resource allocation. They will be especially needed as schools face the reality that disparate access to technology and other resources is leading to more significant learning loss for some students during the pandemic than for others.[36]

HEALTH

To help families weather the pandemic and thrive beyond the crisis, more parents and children must have access to health and mental health care. More than 20 million people are covered through the Affordable Care Act (ACA). Expanding Medicaid under the ACA in the states where it has not yet been expanded would yield coverage for 1.9 million more people. Uninsured rates would be higher without the ACA and Medicaid expansion[37,38] as well as the Children's Health Insurance Program, which serves 9.6 million kids and 370,000 pregnant women annually but could provide coverage for more because eligibility varies widely by state.[39,40]

Children most often receive mental health services through the schools they attend. The American School Counselor Association recommends a student-to-counselor ratio of 250:1, but only three states — New Hampshire, Vermont and Wyoming — have ratios at least that low.[41] Federal and state governments and local school districts could direct more funding toward hiring and equitably distributing counselors or making other investments in mental health services.

Two federal programs — one based in schools, one in communities — provide matching grants to support additional mental health services. These programs — Medicaid's School Based Health Services and the Comprehensive Community Mental Health Services for Children with Serious Emotional Disturbances Program — are limited in their effect by their size and by the fact that many states and school districts have not opted into School Based Health Services.[42] In the short term, the federal government could issue new guidance on how else Medicaid could support mental health care.

RECOMMENDATIONS

This report presents a range of concerns about the needs of children and families — concerns that leaders at every level must take up immediately. Every child in the United States should have the basics, and families should have support to survive the considerable stress and pain of these times. We have tools to respond. Federal, state and local decision makers can take several steps to enable America's children and families to weather this crisis. Timely action is essential to ensure they — and our nation — mount a sufficient response to COVID-19.

Put racial and ethnic equity first in response efforts

- Leaders should use disaggregated data and engage community stakeholders to ensure the policymaking process is informed by the diverse perspectives of those hardest hit by the crisis and created in partnership with communities. This approach should underpin any concrete policy actions.
- Governments at every level must establish and meet benchmarks for reducing inequities in communities before they contemplate fully reopening schools and businesses. This work should be underway and should evolve with the ongoing crisis, using data collected during the pandemic that are disaggregated by race and ethnicity whenever possible.

Prioritize the physical and mental health of all children

- Lawmakers should guarantee that any COVID-19 vaccine will be made available to all, without cost as a factor. In addition to following established public health measures, this will help contain the coronavirus and protect the health of kids and families.

FULLY REOPENING SAFELY IS AN EQUITY ISSUE

This report uses data gathered during the COVID-19 crisis to inform policy recommendations to provide stability for America's children during the pandemic. As post-Great Recession data demonstrate, crises can widen disparities between rich and poor and across races and ethnicities. This is why leaders must consciously and deliberately prioritize equity.

An encouraging early example is California's Blueprint for a Safer Economy. In April, the California Pan-Ethnic Health Network asked Gov. Gavin Newsom to consider the disparate effects COVID-19 was already having on the state's communities in drafting any recovery plans. Commendably, his administration did.[43] To proceed with reopening, most California counties must "ensure that the test positivity rates in [lower-resourced neighborhoods] … do not significantly lag behind its overall county test positivity rate."[44]

Every state, county and city must aim for equitable outcomes by using data disaggregated by race and ethnicity and by including in response-related discussions the people who are affected, including youth and other community members.

- Congress should strengthen the Affordable Care Act so that more families, including all children in immigrant families, are insured. States that have yet to expand Medicaid under the ACA should do so.
- To promote mental health, policymakers should work to reduce the student-to-counselor ratio to levels recommended by mental health professionals by increasing funding at the federal and state levels and budgeting for additional staffing at the school district level. They should leverage federal behavioral health programs through increased federal investment and state participation.

Help families with children achieve financial stability and bolster their well-being

- Federal and state governments should expand access to unemployment insurance for part-time, gig, low-wage and student workers. To help families meet their kids' needs, states should provide modest child allowances.
- Leaders should eliminate barriers to accessing Temporary Assistance for Needy Families by allowing people who are pursuing an education or job training to qualify and by removing limits on assistance to children born to parents already enrolled in the program.
- To help preserve access to child care, Congress and state legislatures should provide relief grants to enable center- and home-based child care providers to survive the pandemic. Lawmakers should also work to increase access to high-quality care, reduce its considerable cost and encourage higher wages and safe working conditions for the child care workforce.
- Beyond any temporary housing assistance programs aimed at heading off a foreclosure or eviction crisis, federal policymakers should expand subsidy programs for families who are more likely to have children, such as the Section 8 Housing Choice Voucher program, and increase the overall availability of public housing.
- Congress should expand the federal Earned Income Tax Credit and Child Tax Credit to provide additional resources to families.

Ensure schools are better and more equitably funded and ready to meet the needs of students disparately affected by the pandemic

- Federal and state policymakers should protect school funding from the economic effects of the pandemic to the greatest extent possible, incorporate maintenance-of-equity requirements into relief packages and invest to address disparities in technology access at home and in the classroom.
- Leaders at every level of government should strengthen the American education system by transforming the way schools are funded. Congress should require additional spending where student need is the highest and work with the states to mitigate the effects of inequitable spending — disparities that are likely to grow due to learning loss during the pandemic.
- Especially given the disparate effects of the lack of access to technology and other resources during the COVID-19 crisis, local school leaders should redouble efforts to achieve equity by establishing school equity policies.

The first order of business in 2021 will be to determine how best to navigate the second year of a pandemic. These are painful times, but this nation has the resources to meet the needs of those most affected by the ongoing health and economic crisis. Our leaders can respond in ways that enable kids to thrive in spite of the extraordinary times we're living in. Our nation must choose to act with the urgency our children's futures deserve.

INDICATOR DEFINITIONS AND DATA SOURCES

SOURCE: U.S. CENSUS BUREAU, HOUSEHOLD PULSE SURVEY, 2020.

Sometimes or often do not have enough to eat is the percentage of adults living in households with children who reported that their household sometimes or often did not have enough food to eat in the past week. Only respondents who provided a valid response are included.

Slight or no confidence in paying rent or mortgage on time is the percentage of adults living in households with children who reported that they have slight or no confidence in paying the next rent or mortgage payment on time. Only respondents who provided a valid response are included.

Currently do not have health insurance is the percentage of adults living in households with children who reported that they are uninsured. Adults were classified as uninsured if they did not report any private health insurance coverage or public health plan coverage at the time of the interview. Adults were also classified as uninsured if they had only Indian Health Service coverage. Only respondents who provided a valid response are included.

Felt down, depressed or hopeless is the percentage of adults living in households with children who reported that they felt down, depressed or hopeless for more than half of the days or nearly every day for the past week. Only respondents who provided a valid response are included.

Likely to have to leave home is the percentage of adults living in households with children who reported that their household is very or somewhat likely to have to leave their home or apartment due to eviction or foreclosure in the next two months. Only respondents who are currently paying rent or mortgage, are not caught up on rent or mortgage payments and provided a valid response are included.

SOURCE: WASHINGTON UNIVERSITY IN ST. LOUIS, SOCIAL POLICY INSTITUTE, SOCIOECONOMIC IMPACTS OF COVID-19 SURVEY (WAVE 2), 2020.

Lacking access to at-home learning resources is the percentage of adults living in households with school-age children who reported that they did not have each of the following available for their children to learn at home: online learning tools; a broadband internet connection; a quiet space to study; or an adult who is able to help with learning tasks.

Less likely to return to work due to a lack of child care is the percentage of adults living in households with children who agreed or strongly agreed with the statement: "A lack of suitable child care since the start of the COVID-19 pandemic has made me less likely to return to work in the fall."

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ABOUT THE ANNIE E. CASEY FOUNDATION

The Annie E. Casey Foundation is a private philanthropy that creates a brighter future for the nation's children by developing solutions to strengthen families, build paths to economic opportunity and transform struggling communities into safer and healthier places to live, work and grow. To learn more, visit www.aecf.org.

The Annie E. Casey Foundation's KIDS COUNT® is a national and state effort to track the status of children in the United States. By providing policymakers and citizens with benchmarks of child well-being, KIDS COUNT seeks to enrich local, state and national discussions concerning ways to build a better future for all children.

Nationally, KIDS COUNT produces publications on key areas of well-being, including the annual *KIDS COUNT Data Book* and periodic reports on critical child and family policy issues.

The Foundation's KIDS COUNT Data Center (datacenter.kidscount.org) provides the best available data on child well-being in the United States. Additionally, the Foundation funds a nationwide network of state KIDS COUNT organizations that provide a more detailed, local picture of how children are faring.

Unaudited

The Family Tree
Operating Results - General Fund
6 Months Ended, Dec 2020

Dec-20 YTD	Dec 2019 YTD	Variance YTD $	Variance YTD %		Annual Projection	Approved FY 21 Annual Budget	Variance Projected Vs. Budgeted $	Variance Projected Vs. Budgeted %
660,858	691,812	(30,954)	-4.47%	Government Grants	1,429,858	1,408,764	21,094	1.50%
257,334	82,450	174,884	212.11%	Foundation Grants	447,334	425,000	22,334	5.26%
150,759	204,000	(53,241)	-26.10%	Contributions	850,759	875,000	(24,241)	-2.77%
55,771	46,679	9,092	19.48%	Fund Raisers (Net)	830,000	830,000	(0)	0.00%
23,199	59,050	(35,851)	-60.71%	Program Fees	77,199	113,000	(35,801)	-31.68%
50,000	26,000	24,000	92.31%	Endowment Revenue	50,000	45,000	5,000	11.11%
				Program Reserves	0	33,636	(33,636)	
1,197,921	**1,109,991**	**87,929**	**7.92%**	***Total Revenue***	**3,685,150**	**3,730,400**	**(45,250)**	**-1.21%**
1,308,768	1,213,433	95,335	7.86%	Salaries	2,658,768	2,550,349	108,419	4.25%
201,348	199,768	1,579	0.79%	Benefits	430,848	440,340	(9,492)	-2.16%
136,942	125,385	11,557	9.22%	Professional Fees	186,942	187,344	(402)	-0.21%
31,171	1,841	29,330	1593.46%	Staff Training	32,171	25,000	7,171	28.68%
7,425	10,100	(2,675)	-26.49%	Volunteer Stipends	15,425	25,000	(9,575)	-38.30%
183	16,593	(16,411)	-98.90%	Volunteer Training/Spt./Recog	2,183	10,000	(7,818)	-78.18%
1,710	29,090	(27,380)	-94.12%	Travel	9,210	35,000	(25,790)	-73.69%
7,646	10,396	(2,750)	-26.45%	Participant Supplies	20,146	35,000	(14,854)	-42.44%
9,274	13,836	(4,562)	-32.97%	Supplies	22,274	33,000	(10,726)	-32.50%
17,492	23,234	(5,742)	-24.71%	Communication	33,492	34,282	(790)	-2.30%
50,240	118,988	(68,748)	-57.78%	Equipment Rental/Maint.	101,240	112,278	(11,038)	-9.83%
3,434	5,291	(1,857)	-35.11%	Marketing/Public Relations	18,434	20,000	(1,566)	-7.83%
6,779	22,840	(16,061)	-70.32%	Printing	21,779	36,000	(14,221)	-39.50%
16,389	44,537	(28,148)	-63.20%	Occupancy	45,889	99,286	(53,397)	-53.78%
17,378	25,497	(8,119)	-31.84%	Insurance	33,378	36,000	(2,622)	-7.28%
2,581	5,561	(2,980)	-53.59%	Dues/Subscriptions	10,081	20,000	(9,919)	-49.60%
1,092	1,167	(75)	-6.39%	Delivery	2,592	2,500	92	3.68%
12,989	15,783	(2,794)	-17.70%	Miscellaneous	25,989	29,021	(3,032)	-10.45%
1,832,840	**1,883,340**	(50,500)	-2.68%	Operating Expense	**3,670,840**	**3,730,400**	**(59,560)**	**-1.60%**
(634,919)	**(773,349)**	**138,429**	**-17.90%**	***Net Operating Income (Loss)***	**14,310**	**0**	**14,310**	

Dec-20 YTD	Dec 2019 YTD	
52	232	***Gain (Loss) On sale of Gifted Stock***
8,528	14,570	***Investment Income***
47,000	48,000	***Depreciation Expense***
(673,444)	**(806,547)**	***Net Income/(Loss)***
309,500	**412,219**	Net effect of Restricted Funds

<u>Restricted Funds</u>	**Amt Restricted**	**Est Release**
FY 21 Contribution Pledge	221,000	110,500
FY 21 Event Pledge	353,000	176,500
FY 21 Abell Foundation	15,000	7,500
FY 21 Blaustein Foundation	25,000	12,500
FY 21 Myers Foundation	5,000	2,500
<u>Net Restriction</u>	619,000	309,500

The Family Tree Raising families up.

Summary of Operating Results
6 Months Ended December 2020

Revenues:

Government Grants:

Government Grant revenue year-to-date is $661,000 and is 4% behind where we were last year at this point. This is chiefly the result of unfilled nursing positions, minimal non payroll spending due to COVID and timing. Despite the under-spending we expect to meet the budget by modifying the grant to line items where we are spending. All grant positions for the Family Connects program are now filled.

Foundation Revenue:

Foundation Grant revenue year-to-date revenue is $257,000. It is well ahead of last year's pace at the end of December. This is chiefly due to receipt of a grant from the United Health Care foundation of $95,000 to support our Family Education efforts in the counties and $50,000 from the Bauer Foundation.

Contributions:

Contributions year-to-date are $151,000 which is behind last year's revenue by $53,000. These revenue numbers are not unusual for non-pledge years and last year's revenue included a $25,000 gift from the Rothschild Foundation. We expect this number to increase but postal service has been extremely slow of late.

Fund Raisers Net:

Net Fund-Raising revenue year-to-date is $56,000 and $9,000 ahead of last year's pace. Here, the year over year variance is driven by support for the Lace Up event. We expect to reach budget numbers by year end.

Program Fees:

Program fees year-to-date are $23,000 which represents an 61 % decrease from prior year. The decrease is driven by the Pandemic's effect on the number of Day Care facilities in operation that avail themselves of resource center trainings. We also reduced prices of BCCCRC trainings to help struggling providers. We've also shifted gears on the stem program charging a $100 flat fee to all participants forgoing any insurance billing.

Endowment Revenue:

Endowment Revenue that is distributable from the Weinberg Fund for FY 20 is $50,000. The Investment Committee decided to take the distribution in September and as stipulated in the FY 21 budget will be used to support operations.

Program Reserve:

Based on current predictions, it looks as though we will not need to utilize any of the Program Reserve this year.

Expenses:

Salaries:
Salary expense to date is $1,309,000 and compared to a year ago is 8% higher. This year over year increase is attributable to increases in staffing as a result of the increase in funding for the Maryland Family Connect Program. We expect this line to be over budget at year end

Benefits:
Benefit expense year-to-date is $201,000 and compared to a year ago is 1% higher. The increase is reflective of more staff.

Professional Fees:
Professional Fees expense to date is $137,000 and is $12,000 higher than last year at the end of December. This increase is mainly attributable to higher research and audit costs We project to spend the lion's share of this line item by fiscal year end. The research costs related to the Family Connects program will end in January 2021.

Staff Training:
Training costs include the Renewal of the ACE licensing and training for the Maryland Family Connects Program.

Equipment Rental/Maintenance:
Equipment Rental/Maintenance expense to date is $50,000 and is $69,000 less than the same time last year mainly due to the timing of expenditures related to software licensing purchases for both the Penelope and Cloud based Raisers Edge Systems in FY 20.

Occupancy:
Occupancy expense to date is $16,000 and is $28,000 lower than the same time last year mainly due to lower utility usage and janitorial costs.

Liabilities note:
As of December, the organization’s liabilities consist mainly of funds received under the PPP program (that we fully expect to be forgiven) and deferred FICA costs. The deferred FICA ($108,000) will need to be paid back over the next two Calendar Years and fully paid by 12/31/22.

The Family Tree Raising families up.

Statement of Financial Position as of December 31, 2020

ASSETS	
Current Assets	
Cash	1,231,893
Accounts Receivable S/T	975,147
Other Current Assets	
Investments - Morgan Stanley	2,957,420
Membership Interest Vance LLC	300,000
Prepaid Expense	41,068
Total Other Current Assets	3,298,487
Total Current Assets	5,505,527
Total Fixed Assets (Net of Depreciation)	1,383,190
TOTAL ASSETS	6,888,717
LIABILITIES & NET ASSETS	
Liabilities	
Current Liabilities	
Accounts Payable	59,693
Payroll Withholdings	105,703
Salaries Payable	240,938
SBA PPP Loan	530,937
Total Current Liabilities	937,271
Total Liabilities	937,271
Net Assets	
Donor Designated Endowment	1,003,173
Donor Designated	524,750
Donor Undesignated	4,423,523
Total Net Assets	5,951,446
TOTAL LIABILITIES & NET ASSETS	6,888,717

Cash/Investment Balances
as of Dec, 2020

		July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	March	April	May	June
Operating Cash (including MMA at MS)	FY 2019	1,437,435	1,385,162	1,238,580	1,244,936	1,176,130	1,080,558	1,311,239	1,524,936	1,268,849	1,349,151	1,496,890	1,287,945
Operating Cash (including MMA at MS)	FY 2020	1,107,673	862,036	798,115	890,694	858,371	933,389	901,225	1,017,677	986,651	1,673,807	1,636,790	1,458,348
Operating Cash (including MMA at MS)	FY 2021	1,576,832	1,642,537	1,469,656	1,489,315	1,577,667	1,381,209						
Building	FY 2019	106,541	102,474	102,474	102,474	102,474	102,474	97,934	97,934	89,279	81,804	81,804	76,084
Building	FY 2020	68,324	68,324	93,324	92,159	92,159	92,159	92,159	92,159	92,159	87,987	87,987	87,987
Building	FY 2021	87,987	87,987	83,815	83,815	83,815	83,815						
Next Generation	FY 2019	1,790,557	1,819,009	1,818,951	1,697,253	1,701,697	1,559,453	1,688,270	1,731,873	1,715,800	1,746,638	1,724,822	1,763,535
Next Generation	FY 2020	1,761,557	1,755,946	1,772,657	1,796,376	1,826,100	1,865,755	1,857,690	1,754,019	1,577,687	1,695,100	1,654,523	1,772,223
Next Generation (FMV 12/31/20)	FY 2021	1,837,786	1,885,671	1,856,331	1,834,115	1,984,241	2,054,320						
Weinberg Endowment	FY 2019	1,104,618	1,121,636	1,070,345	1,000,265	1,004,161	923,458	998,634	1,024,200	1,017,574	1,036,841	1,022,523	1,045,900
Weinberg Endowmwnt	FY 2020	1,044,776	1,039,356	999,917	1,012,811	1,028,349	1,051,412	1,044,373	989,963	892,080	957,512	935,742	1,002,539
Weinberg Endowmwnt (FMV 12/31/20) Draw in 9/20	FY 2021	1,040,813	1,067,090	1,001,740	991,900	1,070,554	1,105,738						
Total	FY 2019	4,439,151	4,428,281	4,230,350	4,044,928	3,984,461	3,665,943	4,096,077	4,378,943	4,091,502	4,214,434	4,326,039	4,173,464
Total	FY 2020	3,982,330	3,725,662	3,664,013	3,792,040	3,804,979	3,942,715	3,895,447	3,853,818	3,548,577	4,414,406	4,315,042	4,321,097
Total	FY 2020	4,543,418	4,683,285	4,411,542	4,399,145	4,716,277	4,625,082						
Days of Operating Cash @ month End FY 19		165	159	142	143	135	124	151	175	146	155	172	148
Days of Operating Cash @ month End FY 20		102	79	74	82	79	86	83	94	91	154	151	134
Days of Operating Cash @ month End FY 21		154	161	144	146	154	135						
Days of operating Cash rolling six months avg		130	141	150	148	149	149						

Denotes Highest value over 3 year timeframe

Denotes Lowest Value over 3 Year timeframe

The Family Tree
Portfolio Net Worth & Performance Summary
As of 11/30/20

	Balance 11/30/2019	Balance 11/30/2020		Performance Summary * Month	Performance Summary * Fiscal YTD	Performance Summary * Basis		Dividends & Cap Gains Month	Dividends & Cap Gains Fiscal YTD
Morgan Stanley Money Market Fund	$ 200,058	$ 228,962						$ 3	$ 16
<u>Next Generation Fund:</u>	$ -								
Morgan Stanley	$ 1,826,100	$ 1,984,241		8.2%	11.9%	19.2%		585	$ 6,065
	$ -	$ -							
Total Next Generation:	$ 1,826,100	$ 1,984,241		8.2%	11.9%	19.2%		585	6,065
	$ -								
<u>Weinberg Fund:</u>	$ -								
Morgan Stanley	$ 1,028,349	$ 1,070,554		7.9%	11.7%	23.7%		378	$ 3,413
	$ -	$ -						-	
Total Weinberg:	$ 1,028,349	$ 1,070,554		7.9%	11.7%	23.7%		378	3,413
TOTAL BALANCES	$ 3,054,507	$ 3,283,757		7.5%	11.0%	20.7%		$ 966	$ 9,494

Weinberg Endowment Draw 9/20 $50,000

*After netting for Fund Transfers, additions and Drawdowns but inclusive of Dividends and CG

Percent of Balance Active vs Passive	**Active**	**Passive**
Next Generation	50%	50%
Weinberg	55%	45%
Total	52%	48%

-

Portfolio Performance & Advisor Fees @ 11/30/20	CYTD	1 Year	3 Year	5 Year
Advisor Fees	$ 17,539	$ 17,539	$ 59,869	$ 103,375
TFT Performance	6.5%	8.8%	6.2%	8.3%
TFT Performance (With Fees added back)	7.1%	9.4%	6.9%	9.2%
Performance of the Blended Index in IP	7.7%	9.7%	7.8%	9.0%

Portfolio Allocations (Weinberg)	Value $	Percent
Equity	$ 753,644	70%
Fixed	$ 316,910	30%
Total	$ 1,070,554	100%
Portfolio Allocations Next Generation		
Equity	$ 1,470,018	74%
Fixed	$ 514,223	26%
Total	$ 1,984,241	100%
Portfolio Allocations Combined		
Equity	$ 2,223,662	73%
Fixed	$ 831,133	27%
Total	$ 3,054,795	100%