

Daisy Marquis Jones
Foundation

Annual Report

2021

*Daisy Marquis Jones
Foundation*

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Daisy Marquis Jones

A Quiet Power for Good



Daisy Marquis Jones lived modestly and did not want to be known as a woman of wealth. She lived most of her adult life on Wilmer Street in Rochester and later on a dairy farm in Yates County.

Not known for an extravagant lifestyle, those who knew her agreed on two things: she wanted to help others and she was a shrewd investor.

Three years before her death in 1971, she established the foundation bearing her name with the help of her nephew, Leo Marquis Jones.

Now, half a century later, the Daisy Marquis Jones Foundation continues her legacy to improve the well-being of the communities she called home.

The Foundation recognizes that, like Daisy, every person has the potential to transform our world and that change starts with us. From humble beginnings, through compassion and hard work, we can make a positive impact that will strengthen our neighbors and communities.

Mission

Through a daily practice of generosity and giving, the Daisy Marquis Jones Foundation improves the well-being of residents in Monroe and Yates Counties, NY—with specific emphasis on the City of Rochester. A central concern is disadvantaged children and families and the neighborhoods in which they live.

Vision

The Foundation continues to build a caring, compassionate community by providing support to nonprofit organizations with programs or projects that provide access to health care, attend to the needs of young children, assist senior citizens, and help families develop economic security.

Success in these efforts will result in a thriving, vibrant, interconnected community.

Strengthening Our Communities

Empowering People

Impacting our Youth

TRUSTEES AND OFFICERS:

President/Trustee:	Donald W. Whitney
President/Trustee:	Kamra Whitney Rowland
Trustee:	Ann Crawford
Trustee:	Roger L. Gardner
Trustee:	Elizabeth Hayes
Trustee:	C. John Matteson
Trustee:	Carol White
Trustee:	Megan Whitney
Trustee:	Shannon Whitney

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Attorney:	Justin L. Vigdor, Bond, Schoeneck & King
Accountant:	Regina Roberts, The Bonadio Group

STAFF:

Administrative Assistant/Secretary:	Andrea Weinstein
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***The Daisy Marquis Jones Foundation is a Family Foundation,
established in 1968 by Daisy Marquis Jones and her nephew Leo Marquis Lyons.***



DAISY MARQUIS JONES was born to Jacob and Rose Marquis in Pennsylvania in the late 1870's and spent her childhood there. One of five children, she developed an interest in investing her money at an early age.

In the early 1900's she moved to Rochester and in the 1920's lived on Wilmer Street off Monroe Avenue.

In the 1940's she married J. Nelson Jones, who owned a dairy farm in Himrod, Yates County. She moved there to help him run Bellview Farms Dairy and developed a special interest in Yates County.

When Nelson died in the 1960's, she donated the farm house to the community's fledgling volunteer fire department and helped support their efforts to build a firehouse and purchase equipment. The Foundation continues to make significant grants to improve the quality of life in Yates County.

After her husband's death, she returned to her home on Wilmer Street. An astute businesswoman, she had gained the admiration and respect of local bankers and brokers for her shrewd investment skills, but was little known in the community at large. She was a private person. She continued to live modestly, investing her money.

Childless, she had intended to leave the bulk of her estate to her nephew, Leo Marquis Lyons. He persuaded her to leave it to a charitable foundation instead, so together they established the Daisy Marquis Jones Foundation three years before her death.



The home of the late Daisy Marquis Jones is located at 37 Wilmer St.

LEO MARQUIS LYONS, born in 1904, was the only child of Jacob and Phoebe Lyons. Like his Aunt Daisy, he was an astute businessman and wise investor. He was a builder of fine homes, following in his father's footsteps, who built the family home near Daisy's on Wilmer Street.

Leo was also a very private person. Although he never married, he loved children. He always said the Foundation was his baby, his child, and his legacy to the Rochester Community.

Known as the "heart" behind the Daisy Marquis Jones Foundation, he served as the chairman of the Board of Trustees from its inception in 1968 until his death in 1997, leaving the bulk of his estate to the Foundation as well.

The Foundation remains steadfast to Daisy and Leo's dedication to strengthening our neighbors and our communities.



Remembering Donald W. Whitney
1948 – 2021
Trustee 1993 – 2021
Foundation President 2010 – 2021

DONALD W. WHITNEY became a trustee of the Daisy Marquis Jones Foundation in 1993, and Foundation President in 2010. He served the Foundation until his passing in January, 2021.

Mr. Whitney was a descendent of the Marquis family; His mother, Helen Goode Whitney, was the niece of Daisy M. Jones and cousin of Leo M. Lyons.

Mr. Whitney worked as a teacher, school principal and appliance repairman in Adams, Adams Center and Watertown, New York. He was active in the community from planning to historic preservation. He and his wife Linda raised three daughters, Kamra, Shannon and Megan, and enjoyed three grandchildren, Kaeden, Seth and William.

He became known in the Rochester area for his leadership at the Daisy Marquis Jones Foundation as well as for his personal style: happy, full of energy, and a great storyteller.

Mr. Whitney was asked in an interview: "How do you want to be remembered?"

He answered: "I had my opportunity to have what I have, and I want the opportunity to give back. That's all I want to do. I don't want any name, or any plaques, or anything else out there. I just want to have the chance that, in my lifetime, I had a chance to give back."



Funding

The foundation believes that we can best serve those in need by granting time-limited support to nonprofit organizations with programs or projects that provide access to health care, attend to the needs of young children and senior citizens, or help families develop economic security

The Daisy Marquis Jones Foundation offers support to qualified nonprofit organizations exempt from federal income taxes under Section 501 (c) (3) of the Internal Revenue Code and that are not private foundations.

The Foundation values programs and projects which:

- Give people the tools they need to help themselves
- Outline a well-planned approach with clear timelines and measurable outcomes
- Make a positive, long-term impact on individuals, neighborhoods, and communities served
- Encourage collaboration among agencies to maximize the impact of the grant

We are unable to fund the following:

- Organizations or projects not in Monroe or Yates Counties of New York State
- Non 501 (c) (3) organizations
- Emergency funding
- Endowments
- Local chapters of national health-related organizations
- Private schools
- Projects by individuals
- Religious projects
- Research
- Scholarships

Application Process

A short letter of inquiry is the preferred form of initial contact. The letter can be sent by US mail or submitted electronically online at www.dmjf.org.

The inquiry should include a brief description of the project or program for which financial support is sought, including a brief description of the program or project's planned (major) outcomes and evaluation plan, how the funds will be used, the total cost of the program or project, and amount requested from the Foundation, the time period of the grant, and the date the funds are needed.

If the proposed project is consistent with the Foundation's objectives and areas of interest, the grant seeker will be invited to submit a formal application.

The Foundation uses the Rochester Grantmakers Forum "Common Application Form." This form must be completed and submitted to the Foundation by US Mail. It provides required information, such as the organization's general operations, as well as a detailed program description, plans for evaluation, and coordination with related organizations and programs.

Grant applications are received on a rolling submission basis. All application are reviewed by the Foundation Trustees. Due to the substantial increase in the numbers of proposals under review, final notification takes two to three months.

**Inquiries and applications
should be directed to:**
Daisy Marquis Jones Foundation
1600 South Avenue
Suite 250
Rochester, New York 14620-3921

FINANCIAL HIGHLIGHTS

TOTAL ASSETS

Dec. 31, 2021

Book Value	\$47,584,322
Market Value	\$71,869,340

INVESTMENT INCOME

\$1,229,528

Exclusive of net gain or loss from sales of assets

EXPENSES

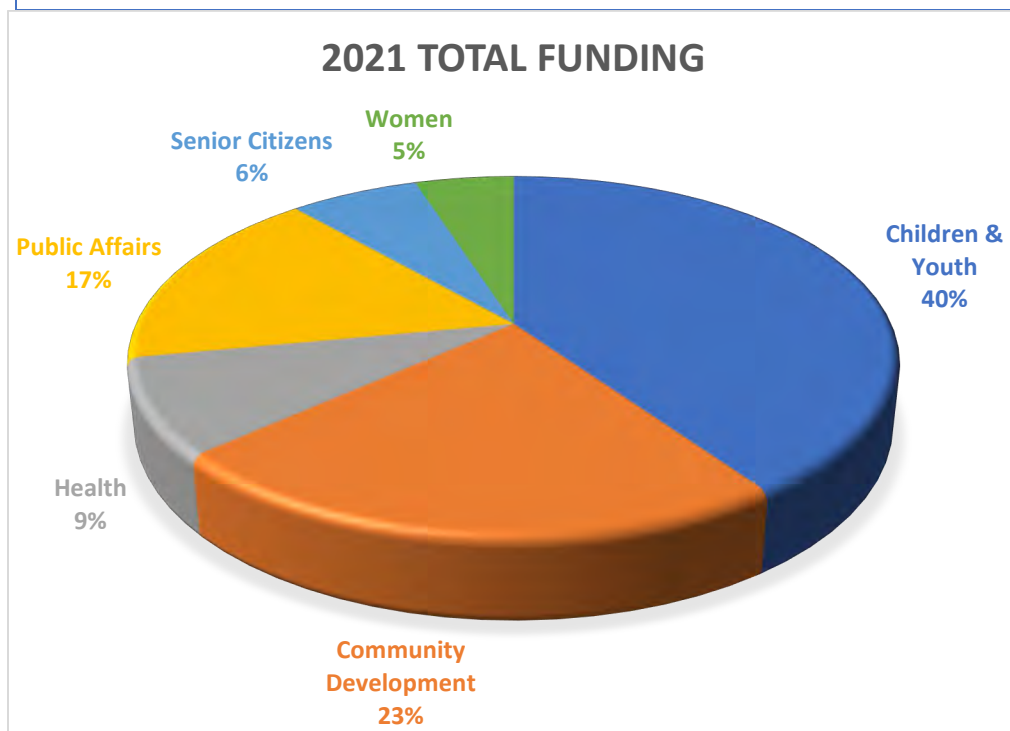
Compensation of officers, directors, trustees, etc.	\$148,250
Employee salaries and wages	39,476
Pension plans, employee benefits	5,170
Legal fees	5,110
Accounting fees	8,585
Investment fees	278,478
Interest	349
Taxes	43,282
Depreciation	-
Occupancy (rent)	10,356
Travel, conferences, and meetings	413
Printing and publications	-
Other expenses	18,348
	<hr/>
Total operating and administrative expenses	<u>\$557,817</u>

SUMMARY OF GRANTS AWARDED IN 2021

Total Funding Committed \$3,567,800

Number of Grants Awarded 115

Category	# Grants Awarded	Funding Support	% Total Funding
Children & Youth	48	\$1,437,800	40%
Community Development	19	\$822,500	23%
Health	14	\$307,935	9%
Public Affairs	21	\$591,500	17%
Senior Citizens	9	\$231,065	6%
Women	4	\$177,000	5%
Total	115	\$3,567,800	100%



Awards by Category

Children and Youth

2021 Children & Youth

<i>Grantee and Purpose</i>	Commitments	Paid 1/1 - 12/31	Payable in following year
ArtsROC, Inc. In support of Build Your Community: A Minecraft after-school pilot program.	\$100,000	\$100,000	\$0
Bivona Child Advocacy Center In support of the Annual Bivona Child Abuse Summit.	\$30,000	\$30,000	\$0
Boys & Girls Clubs of Rochester, Inc. In support of the Accelerated Reading Program	\$60,000	\$60,000	\$0
Cameron Community Ministries, Inc. In support of The Learning & Enrichment Center at Cameron.	\$20,000	\$20,000	\$0
Celebration of Life Community, Inc. In support of the Help Me Read program.	\$50,000	\$50,000	\$0
Center for Disability Rights, Inc. In support of accessible Trunk or Treat.	\$2,000	\$2,000	\$0
Center for Teen Empowerment, Inc. In support of Virtual Reali-Te.	\$800	\$800	\$0
Center for Teen Empowerment, Inc. In support of the Neighborhood-based Youth Organizing Initiatives at 2 sites.	\$50,000	\$50,000	\$0
Center for Youth Services, Inc. In support of the Crisis Nursery and Owen's House.	\$150,000	\$150,000	\$0
Children's Agenda Inc. In support of advocacy for children leading to successful outcomes for kids.	\$40,000	\$40,000	\$0
Compeer Rochester, Inc. In support of the Youth and Family Mentoring program.	\$15,000	\$15,000	\$0
CYC Junior Division <i>Trustee designated grant</i> General support	\$5,000	\$5,000	\$0

2021 Children & Youth

<i>Grantee and Purpose</i>	Commitments	Paid 1/1 - 12/31	Payable in following year
Disability EmpowHer Network, Inc. In support of EmpowHer Camp.	\$6,500	\$6,500	\$0
Eastman Community Music School In support of the Eastman Community Music School's Play It Forward program.	\$10,000	\$10,000	\$0
EnCompass Resources for Learning To support EnCompass Family Navigation program	\$20,000	\$20,000	\$0
Friends of the GardenAerial, Inc. Green Visions Workforce Development Program.	\$10,000	\$10,000	\$0
Future Boxing Club Inc. In support of TEAM (Together Everyone Achieves More).	\$10,000	\$10,000	\$0
Generation Two: Creating Intergenerational Friendships, Inc. In support of the Please Play Campaign.	\$15,000	\$15,000	\$0
Genesee Country Museum In support of educational programming.	\$160,000	\$160,000	\$0
GEVA Theatre Center, Inc. To support the RCSD Passport to P.L.A.Y. program.	\$15,000	\$15,000	\$0
Girl Scouts of Western New York In support of Creating Women Leaders of Tomorrow: An Out-of-School Program.	\$12,500	\$12,500	\$0
Golisano Autism Center, Inc. General support	\$25,000	\$25,000	\$0
Golisano Autism Center, Inc. In support of the Family Autism Navigator/Autism HelpLine.	\$25,000	\$25,000	\$0
Heritage Christian Services, Inc. In support of the Employment Alliance.	\$30,000	\$30,000	\$0
Hillside Children's Foundation In support of Hillside Work-Scholarship Connection. Rochester Regional Program.	\$25,000	\$25,000	\$0

2021 Children & Youth

<i>Grantee and Purpose</i>	Commitments	Paid 1/1 - 12/31	Payable in following year
Innovative Charitable Initiatives <i>Freedom Scholars Learning Center</i> In support of Freedom Scholars Learning Center Summer Program	\$10,000	\$10,000	\$0
Junior Achievement of Rochester, New York Area, Inc. In support of the Junior Achievement Center.	\$20,000	\$20,000	\$0
Mary Cariola Children's Center In support of a new medical suite.	\$100,000	\$100,000	\$0
Milly's Pantry Inc. Weekend Backpack Program.	\$35,000	\$35,000	\$0
Nativity Preparatory Academy Associates of Rochester In support of the Nativity Extended Day program.	\$18,000	\$18,000	\$0
New York State Wine and Culinary Center Inc. For support of the Junior Chef Initiative.	\$15,000	\$15,000	\$0
Pirate Toy Fund To support of the Pirate Toy Fund.	\$20,000	\$20,000	\$0
Rochester Area Community Foundation Initiatives Inc. In support of GRASA: Stem capacity Building Enhancement in Afterschool and Summer Programs.	\$25,000	\$25,000	\$0
Rochester Education Foundation Inc. For support of the College Access and Information program.	\$15,000	\$15,000	\$0
Rochester Institute of Technology/NTID In support of the summer Transition Education Program.	\$25,000	\$25,000	\$0
Rochester Museum & Science Center In support of RMSC school admission fund.	\$50,000	\$50,000	\$0
Rochester Philharmonic Orchestra In support of the RPO Education Programs: Intermediate Concert Series.	\$10,000	\$10,000	\$0

2021 Children & Youth

<i>Grantee and Purpose</i>	Commitments	Paid 1/1 - 12/31	Payable in following year
Seneca Waterways Council, Boy Scouts of America To support after school scouting programs, specifically RCSD School #17.	\$18,000	\$18,000	\$0
South Jefferson Central School District To fund Annual College Scholarship established in 2021 in honor of the memory of Donald W. Whitney.	\$5,000	\$5,000	\$0
South Jefferson Central School District To fund Annual College Scholar Fund in honor of the memory of Helen G. and Donald Whitney.	\$5,000	\$5,000	\$0
Starbridge Services, Inc. In support of prevocational employment transition services.	\$10,000	\$10,000	\$0
University of Rochester In support of the Horizons at UR Warner School Summer Education and Enrichment for City schoolchildren.	\$25,000	\$25,000	\$0
Watertown City School District To fund Annual Scholarship established in 2021 in honor of the memory of Donald W. Whitney,	\$5,000	\$5,000	\$0
Watertown City School District To fund Annual Scholarship in honor of the memory of Helen G. and Donald Whitney.	\$5,000	\$5,000	\$0
Women's Foundation of Genesee Valley, Inc. In support of the Girl's Initiative.	\$25,000	\$25,000	\$0
Writers & Books, Inc. In support of Literary Arts Enrichment for Rochester Youth.	\$25,000	\$25,000	\$0
WXXI Public Broadcasting Council In support of WXXI Ready to Learn program.	\$60,000	\$60,000	\$0
Yates Cultural & Recreational Resources, Inc. To support the Elevate Youth program	\$25,000	\$25,000	\$0
Section Totals	\$1,437,800	\$1,437,800	\$0

Community Development

2021 Community Development

<i>Grantee and Purpose</i>	Commitments	Paid 1/1 - 12/31	Payable in following year
AI Sigl Community of Agencies Wolk Campus Accessibility Project	\$200,000	\$200,000	\$0
AI Sigl Community of Agencies Additional support for the Wolk Campus Accessibility Project.	\$65,000	\$65,000	\$0
Baden Street Settlement In support of facility improvements for equitable and resilient community programming.	\$150,000	\$150,000	\$0
Begin Again Horse Rescue <i>Trustee designated grant</i> General support	\$1,500	\$1,500	\$0
Canton First Presbyterian Church <i>Trustee designated grant</i> In support of park enhancements	\$5,000	\$5,000	\$0
Catholic Charities Community Services In support of Breakfast with Friends. A 2:1 matching grant up to \$30,000.	\$30,000	\$30,000	\$0
East House Corporation In support of Education and Employment Services at the Paul Wolk Learning Center.	\$10,000	\$10,000	\$0
Genesee Country Museum In support of the Nature Center Interpretive Renovation.	\$100,000	\$100,000	\$0
Grove Mount Cemetery Association To assist with tree removal and plantings.	\$1,000	\$1,000	\$0
Historical Association of South Jefferson In Memory of Donald W. Whitney	\$5,000	\$5,000	\$0
Irondequoit United Church of Christ In support of ESWA's Self Help Membership Benefit Program and Seasonal Campaign Expansion.	\$20,000	\$20,000	\$0
Landmark Society of Western New York In support of the Annual Preservation Conference, Walk-the-Walk, and NY Statewide Preservation Conference.	\$20,000	\$20,000	\$0

2021 Community Development

<i>Grantee and Purpose</i>	Commitments	Paid 1/1 - 12/31	Payable in following year
Literacy Volunteers of Rochester In support of Literacy Volunteers Access classes.	\$15,000	\$15,000	\$0
Margaret Woodbury Strong Museum In support of Community Outreach and Access Programs.	\$25,000	\$25,000	\$0
Rochester Childfirst Network RCN's final capital project: roof repair.	\$30,000	\$30,000	\$0
Rochester Folk Art Guild In support of the East Hill Farm Capital Improvements.	\$35,000	\$35,000	\$0
Rural Cemetery Association of the Village of Adams General support	\$8,000	\$8,000	\$0
St. Joseph's Neighborhood Center, Inc. <i>Trustee designated grant</i> General support	\$2,000	\$2,000	\$0
Watertown Family YMCA Trustee designated grant in support of a new downtown YMCA Community and Aquatic Center.	\$100,000	\$100,000	\$0
	Section Totals	\$822,500	\$0

Health

2021 Health

<i>Grantee and Purpose</i>	Commitments	Paid 1/1 - 12/31	Payable in following year
13thirty Cancer Connect, Inc. Virtual Programming for Adolescents and Young Adults with Cancer.	\$15,000	\$15,000	\$0
Alzheimer's Disease and Related Disorders Association In support of enhanced engagement and community outreach initiative in Yates County.	\$50,000	\$50,000	\$0
American Red Cross, Rochester Chapter For the purchase of a Power Red Machine.	\$8,000	\$8,000	\$0
American Red Cross, Rochester Chapter Additional support for the purchase of a Power Red Machine.	\$7,545	\$7,545	\$0
David Hochstein Memorial Music School, Inc. Rochester Arts Program to expand opportunities for healing, skill building and inclusion for people with disabilities and seniors.	\$10,000	\$10,000	\$0
Equicenter Inc. Arenas for Change: Improving the Lives of Participants, Horses, and Volunteers	\$120,890	\$120,890	\$0
Hearing and Speech Center of Rochester To support the purchase of audiology equipment.	\$12,000	\$12,000	\$0
Lifetime Assistance Foundation, Inc. In support of the Lifetime Legacy Campaign.	\$25,000	\$25,000	\$0
Mercy Flight Central, Inc. In support of the cardiac monitor project	\$10,000	\$10,000	\$0
National Kidney Foundation Serving Upstate New York In support of the 17th Annual Joint Meeting of the Upstate and Western NY Councils on Renal Nutrition	\$1,000	\$1,000	\$0
New Faith Community, Inc. In support of Spiritus Christi Mental Health Center's Clinical Care and Peer Support Program.	\$15,000	\$15,000	\$0
Pluta Cancer Center Foundation Inc. In support of the Waiting Room renovation.	\$15,000	\$15,000	\$0

2021 Health

<i>Grantee and Purpose</i>	Commitments	Paid 1/1 - 12/31	Payable in following year
The Allergy Advocacy Association, Inc. In support of anaphylaxis prevention and treatment in Rochester child care centers.	\$3,500	\$3,500	\$0
The Arc of Jefferson - St. Lawrence In support of Transforming Lives and Building a Better Future for People with Intellectual and Developmental Disabilities.	\$15,000	\$15,000	\$0
	Section Totals	\$307,935	\$307,935
			\$0

Public Affairs

2021 Public Affairs

<i>Grantee and Purpose</i>	Commitments	Paid 1/1 - 12/31	Payable in following year
Candid To help the Funding Information Network provide resources and services to grantseekers and grantmakers.	\$1,000	\$1,000	\$0
Community Food Cupboard of Rochester, Inc. <i>Trustee designated grant</i> General Support	\$1,000	\$1,000	\$0
Dimitri House Inc. In support of Dimitri Spectrum of Care.	\$20,000	\$20,000	\$0
Foodlink, Inc. In support of Foodlink's Community Café.	\$75,000	\$75,000	\$0
Friends of Mt. Hope Cemetery To support the repair and restoration of cradle graves.	\$2,000	\$2,000	\$0
Genesee Country Museum <i>Trustee designated grant</i> In support of the Stoneware Exhibit refurbishment	\$3,000	\$3,000	\$0
Genesee Land Trust, Inc. In support of the Farmland Protection program.	\$20,000	\$20,000	\$0
Himrod Fire Department To assist with the purchase of fire equipment.	\$20,000	\$20,000	\$0
Historical Association of South Jefferson For the purchase of the 1840s Jardine Barrel Pump Pipe Organ.	\$10,000	\$10,000	\$0
Humane Society of Rochester & Monroe County SPCA, Inc. In support of the HOME program.	\$15,000	\$15,000	\$0
Lorraine Volunteer Fire Company, Inc. <i>Trustee designated grant</i> For the purchase of thermal imaging equipment	\$5,000	\$5,000	\$0

2021 Public Affairs

<i>Grantee and Purpose</i>	Commitments	Paid 1/1 - 12/31	Payable in following year
Rochester Fringe Festival, Inc. In support of the Rochester Fringe Festival.	\$30,000	\$30,000	\$0
Rochester Fringe Festival, Inc. In support of the project "A Spiegeltent of Our Own."	\$150,000	\$150,000	\$0
Seneca Park Zoo Society In support of the Butterfly Beltway.	\$65,000	\$65,000	\$0
Spiritus Christi Prison Outreach, Inc. In support of the Family Reunification Program.	\$18,000	\$18,000	\$0
St. Lawrence Valley Educational Television Council, Inc. In support of Inside the Stories.	\$30,000	\$30,000	\$0
St. Lawrence Valley Educational Television Council, Inc. In support of WPBS Learning Resources for classroom use.	\$50,000	\$50,000	\$0
The Living Well Community Support Specialist to coordinate suicide prevention education.	\$20,000	\$20,000	\$0
The Mustang Acres Farm <i>Trustee designated grant</i> General support	\$1,500	\$1,500	\$0
University of Rochester/Eastman School of Music In support of Tuba Christmas	\$5,000	\$5,000	\$0
Veterans Outreach Center, Inc. In support of Operation Safe Haven.	\$50,000	\$50,000	\$0
	Section Totals	\$591,500	\$0

Senior Citizens

2021 Senior Citizens

<i>Grantee and Purpose</i>	Commitments	Paid 1/1 - 12/31	Payable in following year
Alzheimer's Disease and Related Disorders Association To help support the Rural Outreach Program in Yates County.	\$35,000	\$35,000	\$0
Fairport Baptist Home In support of the Activities Reimagined program.	\$20,065	\$20,065	\$0
LIFESPAN of Greater Rochester, Inc. To support a 2:1 match grant up to \$50,000, matching donations made at the Celebration of Aging Luncheon.	\$50,000	\$50,000	\$0
LIFESPAN of Greater Rochester, Inc. To support the development of an Older Adult Center with the JCC.	\$50,000	\$50,000	\$0
Six Town Chamber of Commerce Senior Dinners.	\$1,000	\$1,000	\$0
St. Ann's Home Foundation Inc. For support of Supporting Quality Memory Care through Interior Design.	\$40,000	\$40,000	\$0
St. John's Home Foundation, Inc. In support of St. John's "It's Never 2 Late" program.	\$21,000	\$21,000	\$0
University of Rochester Medical Center <i>Trustee designated grant</i> In support of Meals on Wheels	\$1,000	\$1,000	\$0
University of Rochester Medical Center In support of Meals on Wheels: acquisition of new hot boxes.	\$13,000	\$13,000	\$0
	Section Totals	\$231,065	\$231,065
			\$0

Women

2021 Women

<i>Grantee and Purpose</i>	Commitments	Paid 1/1 - 12/31	Payable in following year
Judicial Process Commission, Inc. In support of Faith-Community Adult Mentoring Program.	\$7,000	\$7,000	\$0
Life Listening Resources In support of Creating Jobs for Hard-to-Place Workers.	\$20,000	\$20,000	\$0
Planned Parenthood of Central and Western New York In support of the renovation of a new site.	\$100,000	\$100,000	\$0
YWCA of Rochester & Monroe County In support of Empowering Women Sponsorship.	\$50,000	\$50,000	\$0
	Section Totals	\$177,000	\$177,000
	Report Totals	\$3,567,800	\$3,567,800