IT’S TAKEN 30 YEARS TO GET WHERE WE ARE TODAY.

AND IT’LL TAKE EVERY ONE OF US TO MOVE FORWARD INTO A HEALTHY, RESILIENT, THRIVING FUTURE FOR ALL.
As your Community Foundation, we’re here forever. This means we can adapt to the dynamic nature of our communities over time, meeting needs both as they arise and as they change.

In 2022, we celebrated 30 years as a community partner and philanthropic leader. Here’s a snapshot of what you—alongside many other donor and community partners—helped make possible:

- Advocating and securing resources for housing, childcare, and youth mental health efforts.
- Committing $1 million from our endowed portfolio to support local businesses through investments with Venture North and Northern Initiatives.
- Supporting more than 20 organizations through our Diversity Equity Inclusion Fund that are committed to making our community more equitable and inclusive.
- Convening nearly 40 nonprofit, business, and governmental partners through the Northwest Michigan Community Development Coalition and building relationships with the Grand Traverse Band of Ottawa & Chippewa Indians in support of shared economic, environmental, and societal goals.

As we look ahead to the future, we have some exciting efforts ahead, including:

- Finalizing the move to our new office, giving the Foundation a permanent home and freeing up tens of thousands of dollars in lease expenses that can be used to further invest in our mission, including through grantmaking.
- Continuing our impact investment strategy, allocating another $1 million of our endowed portfolio to support local businesses, earning both a financial and social return on our investments.
- Growing our community fund assets, which we use to broadly support the region by responding to critical needs and opportunities.

Reflecting on our 30 years of impact and the promising future that awaits, we couldn’t be more grateful for all the donor, grant, and community partners that have been on this journey with us. Thank you.

By working together, a healthy, resilient, thriving region for all is within reach.

Sincerely,

David Mengebier
President and CEO

Terry Beamsley
Board Chair
1992-2000: FORMATIVE YEARS

1992: Community Foundation founded by a group of community champions and with the support of Rotary Charities.

1995: W.K. Kellogg Foundation match completed and Youth Endowment established to support youth causes across the region.

1996: Endowments created for each of the five counties, becoming our first collection of community funds.

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1995: Campaign launched for the new Grand Traverse Bay YMCA facility, securing more than $8.5M in support.

2001-2009: CAPITAL CAMPAIGNS

2005: Campaign launched for the creation of the Glen Arbor Garden, resulting in over $100K to build the garden and a permanent endowment for its ongoing benefit.

2009: Campaign launched for Herman Community Park in Suttons Bay, garnering more than $462K in support.

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2010-2017: GROWING ENDOWMENTS

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2010: Focus Fund Endowment established to provide broad support for community needs, resulting in $250K awarded to date.

2013: Cleo M. Purdy Endowment created with a gift from Cleo Purdy’s charitable remainder trust; Cleo’s planned gift eventually totaled over $14M.

2014: Wilfred and Joan Larson Endowment established, funded with the largest cumulative gift in our history, totaling more than $18M.

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2018-2022: EXPANDING IMPACT

2019: Northwest Michigan Community Development Coalition formed to pursue transformational change for our region.

2020: Urgent Needs Fund established in collaboration with other funder and donor partners; nearly $1M in grants awarded for COVID-19 relief.

2021: Diversity Equity Inclusion Fund created; over $80K in grants awarded to date.

2022: First comprehensive community funds grantmaking process, awarding $110K in partnership with our Larson Endowment.

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Friends of Herman Park

Grand Traverse Bay YMCA

Central Lake Early Opportunities / Melissa Clayton Photography

Kalkaska Area Interfaith Resources
For nearly a decade, Central Lake Early Opportunities (CLEO)—a network of community partners—has supported comprehensive early childhood opportunities for children from birth to eight years of age.

Funded by our Cleo M. Purdy Endowment, the CLEO model allows us to cultivate a region that’s healthier for all by starting early with our youngest community members.

“Through free, wrap-around community programs, home visits, parent education, and early childhood resources, CLEO partners can offer unparalleled support to families navigating the early childhood years,” shared Anne Thornton, Early Childhood Director for Central Lake Public Schools.

With assistance from CLEO, families and young children can build strong foundations, prepare for school readiness, and support healthy habits. The Walkowiak family of Central Lake—with three girls ages nine months to six years old—loves what CLEO provides.

“We try to participate in as many programs as possible. The programs have helped my girls learn early socialization skills and how to communicate with other kids,” said Amanda Walkowiak. “My kids know they have a family and community behind them, cheering them on no matter what they’re doing.”

CLEO’s impact on families like the Walkowiaks has been possible because of strong community partnerships and the lasting power of giving through endowment.

“My kids know they have a family and community behind them, cheering them on no matter what they’re doing.”

Amanda Walkowiak
Central Lake Parent
Different sectors of our society—business, government, nonprofit, and Tribal nations—often operate in silos. But through collective cross-sector leadership, we can tap into endless opportunities, from securing public funding resources to engaging local elected officials about the areas of greatest community need and opportunity.

Established in 2019, the NWMI Community Development Coalition, which we convene, is working to do just this through a unified community vision aimed at achieving transformational economic, societal, and environmental change for our communities.

Made up of nearly 40 business, governmental, and nonprofit organizations, Coalition members share information; align and leverage resources; connect with local partners, such as the Grand Traverse Band of Ottawa & Chippewa Indians; and coordinate a variety of actions to support our region.

To learn more, please visit NWMICommunityDevelopment.org.
Arts and cultural experiences are integral to the fabric of our local villages, towns, and cities. They allow us to tap into our own creativity, learn more about different cultures, discover our shared humanity, and inspire a sense of connection and community.

In our region, we’re fortunate to have so many wonderful art and cultural opportunities available, thanks to the support of community members and nonprofit partners, like the Old Art Building of Leland.

Preserved by the Leelanau Community Cultural Center (LCCC), the Old Art Building has been serving as a site of arts programming since 1922 and recently celebrated its centennial year.

Here at the Community Foundation, we steward two endowments for the LCCC and the Old Art Building that provide annual grant support for mission-driven programming and operations.

Thanks, in part, to these endowments, the Old Art Building’s mission is “alive and well,” according to Becky Ross, past Executive Director of the Old Art Building.

“We’re able to host art shows, concerts on stage and the front lawn, exercise classes every morning, and kids programming throughout the year—we are a busy place,” added Becky.

With a new century now ahead, the Old Art Building will continue to be a gathering place for arts and cultural experiences, and the endowments we steward for LCCC and the Old Art Building will continue to contribute to both the present and future vision of a thriving Leelanau area community.

“We’re able to host art shows, concerts on stage and the front lawn, exercise classes every morning, and kids programming throughout the year—we are a busy place.”

Becky Ross
Past Executive Director, Old Art Building

A THRIVING COMMUNITY CONNECTS US

Old Art Building
AN INCLUSIVE REGION VALUES EVERYONE

With a recent grant from our Diversity Equity Inclusion (DEI) Fund, the Autism Alliance of Michigan (AAoM) is working to address employment disparities for Autistic individuals through its Upbound at Work program.

“We believe it is our duty to raise up these disparities, change the systems which created them, and that this work is fundamentally critical to the success of the diversity, equity, inclusion, and justice movement,” said Dr. Colleen Allen, President of AAoM. “To make this belief a reality, support is needed to institute the profound changes we envision for Michigan. Grants like those awarded by the Community Foundation help us do just that.”

AAoM’s Upbound at Work program aims to improve the economic integration, wealth, and independence of job seekers with disabilities while providing access to critical support services and increasing inclusion in employment. Supported by our DEI Fund, AAoM will offer local presentations and training for employers that are engaging in disability hiring initiatives.

“It’s so gratifying when a funder acknowledges the value of our work and invests as a partner in our mission,” added Dr. Allen. “Together, we can improve the quality of life for individuals with Autism and their families in the Grand Traverse region and throughout our state.”

"We believe it is our duty to raise up these disparities, change the systems which created them, and that this work is fundamentally critical to the success of the diversity, equity, inclusion, and justice movement."

Dr. Colleen Allen
President, Autism Alliance of Michigan

A WELCOMING REGION IS ONLY POSSIBLE IF WE’RE INTENTIONAL ABOUT INCLUDING EVERYONE.

That’s why we’ve prioritized DEI in our work and, in 2022, named equity as one of our organizational values. Last year, we implemented the following efforts as a team:

• Began a DEI audit process to examine our internal practices and policies along with our external impact.
• Created a new hiring policy that integrates equitable and inclusive practices.
• Completed two staff trainings focused on disability inclusion and the LGBTQ+ community.
• Provided our Board with two trainings focused on DEI in philanthropy.
• Raised over $80,000 for our DEI Fund, with support from Rotary Charities of Traverse City, Consumers Energy Foundation, and other donor partners.
• Awarded nearly $50,000 in DEI Fund grants to 24 different grant partners.

As we look to the future, there is still a lot for us to learn and plenty of work ahead, but we are committed to a better future for all across our region.
Community funds also help us invest in solutions to complex, chronic problems—from affordable housing shortages to mental health care gaps—which may need multi-year and multi-partner solutions.

Even though just 3% of our total assets are in community funds, we’re continuing to grow this invaluable funding source, thanks to supporters like you.

“This region is an exceptionally generous community. People are grounded in understanding and prioritizing the most important needs of the community and are willing to roll up their sleeves to address these high-priority needs.”

Virg Mouch
Board Chair, 2016-2018
Investing in a Community’s Dream to Revitalize Downtown Thompsonville

What began in late 2020 as an effort to transform a 1900s railroad depot into a functional trailhead has morphed into a plan to revitalize Thompsonville’s downtown core.

With a $15,000 grant from our community funds, Thompsonville Area Revitalization Project (TARP) is in the midst of creating a multi-use trailhead at the historic Thompsonville Junction. Their plan includes building a new visitor’s center and improving the adjacent campground facilities, aiming to make Thompsonville’s downtown a place for all people—from Benzie County and beyond—to enjoy.

According to Chuck Kraus, President of TARP, in addition to several other grants, our community funds grant enabled the organization to cover the projected cost of completing the engineering component of the trailhead project, with the design and construction phases to follow.

“So much of what is done to improve small communities relies on the work of community organizations and nonprofits,” shared Kraus. “Without the support of responsive and flexible funding, projects—such as those envisioned for Thompsonville—would not be possible.”

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Chuck Kraus
President, Thompsonville Area Revitalization Project
Our Youth Advisory Councils (YACs) involve high school students across the five-county region as youth leaders and grantmakers. Many of our YAC students take the skills they learn as students and use those to serve their communities in a variety of ways. Hannah Rodriguez is one such student.

Throughout high school, Hannah participated in our Benzie County YAC. She was an active recruiter, finding peers who also wanted to make a difference in their local community.

“I was always looking for opportunities to make my community a better place and to gain a deeper understanding of challenges in my community,” said Hannah. “YAC was an exciting opportunity for me to be a voice for my community and peers and to affect change.”

Today, Hannah works as a Program Officer at the Manistee County Community Foundation where she leads youth and education programs, including serving as their YAC Advisor—bringing things full circle.

Hannah also serves as an adult advisor to the Michigan Community Foundation’s Youth Project, which leads the development and facilitation of youth programs for YACs across the state. To say YAC impacted Hannah’s life and career trajectory would be an understatement.

“A diverse and inclusive YAC can identify and address needs in the community that adults may simply not be aware of or understand. YACs can impact the future of a community, and that is a powerful opportunity.”

Hannah Rodriguez
Youth Advisory Council alumna

“I meant a lot to me to know that my actions were making a difference in others’ lives and that the decisions we were making had a direct impact on the area’s youth.”

Audrey Michael, Grand Traverse County, 2020-2022

“I most enjoyed being able to help local groups that provide great services to our community.”

Cole Robinson, Antrim County, 2019-2022

“I appreciated learning about the many special organizations around my area as well as being able to further engage with my community.”

Josephine Baldyga, Grand Traverse County, 2020-2022

“I enjoyed knowing that I was doing my part to make our community a better place.”

Tucker Hubbard, Benzie County, 2020-2022
A LEGACY OF COMMUNITY IMPACT

Our Community Guardian Legacy Society honors donor partners that have committed to a future gift or had their gift realized, whether through a will, trust, or another giving plan. Community Guardians are dedicated to investing in our region for the long-term so that their gifts can continue to benefit the region for many generations to come.

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Lucille and Harlan Yeager *
Robert and Pauline Young
Kris A. Sheffer-Zimmerman and J. Eric Zimmerman, M.D.

*I Indicates donors whose gift has been realized.

I’M A COMMUNITY GUARDIAN BECAUSE...

“I want to honor my parents in a lasting way while supporting our community in an area that’s near and dear to my heart and my family.”

Kris Thomas

“I have a goal of leaving good footprints when I am gone; the Community Foundation is a vehicle to help me accomplish that goal.”

Tom Menzel

“We hope to leave the area in a condition as good as or better than we found it.”

Mark and Sue Smith

“I grew up in Traverse City and have been supported by this wonderful community in my youth. We wish to give back with ‘warm hands’ now and in the future once we are gone.”

Richard and Kimiko Williams

“We want our money to live on benefiting others.”

Chuck Cigrand and Sallie Thompson
WILL YOU JOIN US FOR THE NEXT 30 YEARS AND BEYOND?

WITH YOUR CONTINUED SUPPORT, WE CAN MAKE A HEALTHY, RESILIENT, THRIVING REGION A REALITY FOR EVERYONE.
I believe people want the best for this place we call home and, in any way possible, we all want it to make it better for everyone. The Community Foundation continues to be on the cutting edge of addressing the needs of our region."

Susan Cogswell, Board Chair, 2014-2016
Harrington-Fitch Family Foundation
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Steve King
Steve W. King

“Grew up in a small town and loved giving back to my community! The Community Foundation embraces that idea of giving back locally to the areas of biggest needs.”

Marshall Collins, Board Director, Leelanau County

Great Lakes Forge, Inc. GREAT LAKES PACKING COMPANY LEE ANNE McCARTY Ann Greenwell Don and Ann Gregory Patrick and Nancy Griffin Roger and Sheryl Griffin Kathy Gristeiner Dennis and Carol Gripenstong Dick Groul GT Butterfly House & Bug Zoo Alma Perez Guazzardo Thomas Guazzardo Jamie Guyor Joe Guzikowski Don and Kate Gevin Douglass and Nancy Haberland Tammy Hagarty Andi and Rob Halpen Robert and Diane Hamilton Kiff Hamp Steven and Sheila Hamp Valerie Handly Chip and Laura Hansen Harbor Flooring John and Mary Cheryl Hargrove Gary and Sandra Harlacher Scott and Molly Harrison Liz Harstede David and Susan Haughton Jon and Peggy Hawley

“Hope that our future holds room for compromise regarding the direction our region, and the communities within it, will go. I trust the Community Foundation to find, fund, and support the common threads that bind us all.”

Elise Crafts, Board Director, Benzie County

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"In the future, the most successful communities in our region will be those that collaborate across inseparable social, environmental, and economic sectors. The Community Foundation is investing in our region to assure truly thriving communities for this and future generations."

Jerry Ring, Board Director, Grand Traverse County

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Zonta Club of Traverse City Service Fund

Contributions from GTRCF Funds
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Jim and Kit Wybor
Pam Yea
Stan Zbierl
Frank and Ruth Zinn
Andrew and Kristin Zlotnik
Zonta Club of Traverse City Service Fund

2022 DONOR PARTNERS

31
2022 Assets = $86 M

2022 Designated Assets $83M (97%)

2022 Community Fund Assets $3M (3%)

Designed assets have a specific area of focus or benefit, such as scholarships or grants for designated organizations.

Community fund assets are responsive and flexible resources to meet areas of greatest need.

While our investments were impacted by the market downturn in 2022, we continue to have confidence in our investment strategy, which is designed for the long-term. We also have policies in place to lessen the impact of market volatility on our grantmaking as the next few years unfold.
“The future of the Community Foundation is a proactive, leadership role in addressing systemic problems that must be solved in order to foster a flourishing regional community.”

Terry Beamsley, Board Chair, Leelanau County, 2022-Present
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