

Grand Traverse Regional

## **COMMUNITY** FOUNDATION

# **BETTER TOGETHER,**

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better for all.





#### Dear Supporters,

Thank you for your continued faith in our work. We're grateful to you for supporting us as a trusted giving partner and a sustainable resource for our region.

As a community foundation, we're uniquely positioned to invest gifts in permanent endowments that generate ongoing grants and scholarships to support our local communities, forever. In the following pages, you'll see how we're working with partners across the region to ensure our communities have the support they need, when they need it.

We do this using a variety of tools—from impact investing and collaborative leadership efforts to investing in the region broadly through our flexible Community Funds. Each of these distinct tools allow us to respond to the unique needs and opportunities of our growing, rural region.

We're able to have this creative toolbox at our disposal because we can combine gifts from supporters like you to increase value, leverage strategic partnerships for greater impact, and invest for sustainability. All of this ensures that granted funds make a marked difference on the quality of life throughout our region.

By working together, we can support meaningful, lasting change, now and forever. Thank you for joining with us on this journey for a better future for all.

#### Sincerely,

David Mengebier
President and CEO

Jerry Ring Board Chair



### LAND ACKNOWLEDGEMENT

The Grand Traverse Regional Community Foundation is located on the ancestral, traditional, and contemporary lands of the Anishinaabek, the Three Fires Confederacy—who are the Ojibwe, Odawa, and Bodawatomi—and all their relations. We acknowledge that this region has been home to the Anishinaabek, now known as the sovereign nation of the Grand Traverse Band of Ottawa and Chippewa Indians, since time immemorial.

We understand that the historic Treaties intended to reserve land for the local Anishinaabeg were not honored and that this land was unjustly taken from our Indigenous neighbors. The Community Foundation is committed to building deeper relationships with the Tribe and to supporting their priorities.





## **BETTER TOGETHER,**

## better for all.

We believe in the power of generosity to do great things. Partnering with local organizations and people like you allows us to make thoughtful strides toward our ultimate goal—creating a region of healthy, resilient, and thriving communities for all—now and forever.





# YOUR SUPPORT GREW ENDOWMENTS

benefiting our local communities.

YOUR GIFT BROUGHT COMMUNITY LEADERS TOGETHER to advocate for our region.

# YOU HELPED LOCAL STUDENTS pursue their educational dreams.



a step further.

"We prefer to help people right where we

live and to support local nonprofits doing outstanding work in the region."

- Bill Smith, Donor Partner

As long-time residents of Traverse City, **Bill and Mary Smith want to** ensure their dedication to the region's health and prosperity lasts far beyond their own lives. The couple have been Community Foundation donor partners for nearly a decade, ever since Bill was invited to become a Board Director by friend and former Executive Director, Phil Ellis.

Now, Bill and Mary have taken their support a step further by **choosing to leave a gift in their will and becoming members of our Community Guardian Legacy Society**. Their gift will go toward our Community Funds, allowing us the flexibility to respond to community needs as they change over time.

"There's a factor of trust between ourselves and the Foundation," said Bill. "We want staff to use their expertise and determine how our support can help further their mission."

Bill was born in Traverse City, and after attending medical school and doing his residency, he returned to the area with Mary in 1978 and started a family medicine practice. Mary worked for the Intermediate School District (now Northwest Education Services) as a Career Tech Center teacher and professional training administrator, among other roles.

Bill and Mary found a home for their interests in the Community Foundation's environmental and social priorities. Bill treasures the preservation of recreational areas that enable people of all ages and abilities to access natural areas. As a former educator, Mary is drawn to supporting the social and emotional health of local students. "At the Intermediate School District, we serviced the five counties where the Community Foundation provides aid," she said. "I'm acutely aware that some of our small districts need financial support. I celebrate every time one of them receives a grant."

The ability to leave a gift that can benefit any of the community's needs and initiatives was a key component of the Smiths' decision.

"The community's needs may change after we're gone," Mary explained. "We trust that the Community Foundation will be attuned to those needs as they evolve."

Relationships were fundamental to Bill and Mary's entry into our Legacy Society. Deep conversations with our staff showed them that a legacy gift could have a long-term impact in a place they call home.

"We get all kinds of fundraising letters," Bill said. "But **we prefer to help people right where we live** and to support local nonprofits doing outstanding work in the region."

# LEADING TO MEET THE NEEDS of local youth.



Leaders are shaped through mentorship, community involvement, and opportunities to learn and make decisions that affect their community. Through our Youth Advisory Councils (YACs), **high school students from Antrim, Benzie, Grand Traverse, Kalkaska, and Leelanau Counties are empowered as leaders** and to make a difference as grantmakers. As advisors to our Youth Endowment, YAC members have the responsibility to make decisions about issues affecting local youth. By reviewing grant applications and recommending grant awards for youth programs and services that positively support the region, they are connected more deeply to their communities. On average, we have **75 students that participate in our YACs annually, collectively awarding \$90,000 each year**.

"Our YACs are designed to ensure that youth have a voice in their communities and feel empowered to make decisions that impact their peers," said Torey Caviston, our Youth & Community Impact Coordinator.

Aubrey Manchester, a senior at Kalkaska High School, has been a YAC member since her sophomore year and, without question, recommends other high schoolers to get involved. "YAC gives back to the community directly, and you see the lasting effects first-hand in the organizations you donated to."

In 2024, YAC members awarded funds to Child & Family Services of Northwest Michigan (CFS) for its program, YouthWork. However, selecting recipients is no easy task.

"It comes down to how much the grantees help youth," shared Aubrey. "As YAC members, we direct the money to where we see a good fit. YouthWork specifically helped so many kids and teens in many parts of Northern Michigan, which contributed to our funding decision."

Through YouthWork, vulnerable young people learn essential job and life skills, complete environmental and service projects in their communities, and build lifelong relationships while receiving mental health support if needed.



"YouthWork has had a positive impact on youth mental health in the area because the program has allowed kids to be outside and work with others to build relationships," said Ella Knudsen, a YAC member and senior at Leland Public School. "These relationships enable kids to connect, feel welcome, and to be a part of something bigger than themselves, allowing any pressure and expectation they may feel to fall away."

During our 2024 fall grants cycle, CFS received \$26,500 in funding to support its youth-centric programming, with a \$5,000 Youth Endowment grant directly going to YouthWork, thanks to recommendations from YAC students.

"We are so grateful for the partnership with the Community Foundation," said Gina Aranki, CFS Executive Director. "New programs take time to establish themselves, so to be recognized for the impact the program is capable of and has already accomplished is a true testament to the faith and trust the Community Foundation and YACs have in us."

As YAC members and decision-makers for our Youth Endowment, **local students are using and growing their leadership skills**. According to Torey, "Giving youth the space to be heard, make decisions, and learn from each other is extremely important and is what, I hope, will shape them into even more impactful leaders."

## strengthening

## **MENTAL HEALTH SERVICES & PROGRAMS**

## across the region.

In recent years, mental health has gained more visibility, reducing the stigma attached to the conditions that many community members experience. Addressing mental health needs locally is a key priority for our Community Funds, which are a collection of flexible funds aimed at responding to pressing community needs. Last year, in partnership with our donors, we supported a variety of organizations providing mental health programs and services to youth and adults across our region, including Michael's Place, Addiction Treatment Services, and The Rock of Kingsley.

Michael's Place, a center for grieving youth and families, annually serves more than 200 youth through support groups, special events, and creative activities. The organization partnered with 18 schools last year to provide tailored grief support programs to students navigating loss and grief, an effort supported through our Community Funds. This partnership enabled Michael's Place to expand their support services to elementary, middle, and high school students across the region. Like Michael's Place, Addiction Treatment Services (ATS) contributes to the spectrum of care needed to address mental health issues across our region. ATS specifically serves the adult population by promoting the overall health, wellness, and recovery of individuals impacted by substance use disorder and behavioral health challenges. To take its treatment services to the next level, ATS was awarded a Community Funds grant in 2024 to raise programming awareness.

"Without appropriate support, unresolved grief can carry into adulthood, affecting a child's emotional and social well-being," shared Mindy Buell, CEO of Michael's Place. "We equip grieving children with tools and resources that foster resilience and healing."

"The minute someone walks in the door, they know they matter youth, senior citizens, veterans everyone matters."

- Diane Walton, Founder, The Rock of Kingsley

"The vast majority of our funding goes directly into client care, so this grant allows us to shine a light on our services and promote them locally to build a healthier community in Northern Michigan," said Rachel Soulliere, ATS Director of Marketing and Fund Development.

Annually serving nearly 3,500 clients, ATS provides programs that ensure clients receive the best possible care when facing addiction.

"By supporting our clients, we are helping them regain control of their lives, health, support system, and impact on the local community," added Rachel.

Alongside ATS and Michael's Place, The Rock of Kingsley provides a safe space for local community members. The Rock supports people of all ages, from young kids to older adults and bolsters mental health by creating a welcoming, inclusive atmosphere and providing space to connect with peers and build intergenerational friendships.

"We consider ourselves one big family," said Diane Walton, founder of The Rock. "The minute someone walks in the door, they know they matter—youth, senior citizens, veterans—everyone matters."

The Rock offers a variety of programming and services, including afterschool programs, tutors, creative outlets, games, comfortable spaces, and food. The nonprofit also has a close relationship with local veterans' associations and the Grand Traverse County Senior Center Network, enabling veterans and older adults to connect with youth through storytelling, games, and activities, which improves their mental health. Partnering with organizations like The Rock, ATS, and Michael's Place is made possible thanks to our donors, including Ruth Hoppe and Yasmin Richmond. Both Ruth and Yasmin spent their careers in the health field and share a strong commitment to help others through giving.

"Our backgrounds help us understand the significant need for mental health programming in rural communities," said Yasmin. "These programs tend to be underfunded, so we are happy to assist this particular sector of need."

Ruth and Yasmin's passion for supporting their community is what drew them to the flexibility and broad scope of our Focus Fund Endowment one of our Community Funds—which they support with a monthly donation.

"Consistent support allows an organization to predict its resources," said Yasmin. "**We also like the flexible nature of the Focus Fund Endowment** since it allows the Community Foundation to apply its expertise to current needs."

By partnering with donors like Ruth and Yasmin and local organizations like The Rock, ATS, and Michael's Place, through Community Funds we can support a wide variety of mental health programs for local youth and adults. Together, we all play an important role in increasing access to these critical services that strengthen our region's health and resiliency.



# ADVANCING A BRIGHTER FUTURE

for everyone.



"Sometimes we don't even realize how much a grant or an endowment can change people's lives."

- Michael Dively, Donor Partner

When Michael Dively moved to Traverse City in the 1960s, he hardly knew any other gay people. **He'd spent his whole life struggling to understand his feelings and experiences.** Without a queer community to turn to, he didn't come out as a gay man until he was in his 40s.

"That's why supporting the Community Foundation's diversity, equity, and inclusion work is so important to me," said Michael. "I had a long coming out process, and I know that other kids from my era struggled with their queerness by themselves. I'm creating opportunities for others to make up for what I lacked during my own childhood."

In 2024, Michael, a longtime donor partner, seeded our new Endowment for Diversity, Equity, and Inclusion. He has also donated to our Diversity Equity and Inclusion Fund (a non-endowed fund) and established the Michael Dively American Government Award Endowment, which provides an annual award for outstanding Traverse City Area Public Schools students displaying marked excellence in American Government studies.

"I've known about the Community Foundation for years and wanted to do something that would honor queer kids, Indigenous people, those with disabilities, and other folks who are perceived as 'different' within our society," Michael explained. "I found out they had been dreaming of creating an endowment that would allow for ongoing diversity, equity, and inclusion programming, and I wanted to support their efforts. I think it's important to educate our community about embracing the variety of human differences they see all around them."

Michael is dedicated to making a difference in people's lives. Decades before the Community Foundation was founded, he spearheaded a push for a regional community foundation and later co-founded the Community Foundation of the Florida Keys. His Mukti Fund, founded in 1983 to support cultural and environmental projects in the eastern Caribbean, now funds a Queer Youth Theater program and empowers LGBTQ+ youth in central Florida.

He has also endowed awards for student leadership and excellence at Albion and Hiram Colleges. In addition, The Dively Committee for Human Sexuality and Diversity, named in his honor at Williams College, his alma mater, promotes awareness and respect for human sexual diversity.

"Sometimes we don't even realize how much a grant or an endowment can change people's lives," said Michael. "That support nurtures and encourages people, which is part of the joy of being a philanthropist."

The opportunity to create the Endowment for Diversity, Equity, and Inclusion appealed to Michael's longing for underrepresented communities to feel safe and accepted. He hopes this Endowment will help educate people about the importance of celebrating human difference and diversity in a region that remains close to his heart.

"Organizations like the Community Foundation strengthen and nurture the community, and that really makes a difference," said Dively. "It has a positive impact on kids and their families. And when young people are supported by their community, who knows where that will take them?"

## **TO BRING HOUSING**

to our region.

Access to housing is an integral part of a strong, vibrant region. Working families and individuals who can find and remain in the housing of their choice can have the chance to maintain stability, grow financial resources, contribute positively to the broader community, and fulfill their own individual potential.

According to Wendy Irvin, CEO of Habitat for Humanity Grand Traverse Region, one of our recent grant partners, "Study after study has demonstrated that children who grow up in homes owned by their parents have better health, do better in school, have fewer behavioral problems, and are significantly more likely than their peers to become homeowners later in life."

As a Community Foundation, we're dedicated to bringing a variety of tools to the table to address the need for housing in our region, from working with our grant partners and concerned community members to investing in housing support funds and advocating for housing policy.

One of the ways we are diving in is by supporting our grant partners through Community Funds, which allow flexibility to invest in a broad variety of opportunities across our region and respond to the most pressing needs. During our 2024 grant cycle—with decision-making led by our Grantmaking Committee made up of representatives from all five counties—we supported \$115,000 in grants for housing programs, including with Habitat for Humanity Grand Traverse Region, Northwest Michigan Supportive Housing (NMSH), and Housing North.

"Receiving the Community Funds grant re-affirmed and gives validity to what we are doing," said Becca Binder, Executive Director of NMSH. "We are a small nonprofit and the opportunity **to receive this grant shows that the Community Foundation directly impacts people in our community** and also lifts up our work."





As part of these recent awards, **our grant partners are working on a variety of housing solutions** to support our region:

- NMSH has set a goal to house 15 chronically homeless local individuals and families in 15 months.
- Habitat for Humanity GT Region is building out the New Waves Housing Development in Leelanau County, which has the greatest cost-of-living in our region as well as the most limited access to affordable housing in our state.
- Housing North is growing its Housing Ready program in Antrim and Kalkaska Counties which will provide hands-on support for housing solutions and local programs, such as helping to match developers with buildable sites, providing policy and zoning guidance, and supporting housing or rural readiness grant applications.

Alongside these grant partnerships, last year we convened the Homelessness Collective, advocated for housing policy with the Northwest Michigan Community Development Coalition, and invested \$1 million in the Michigan Affordable Housing Loan Fund at IFF, a community development financial institution, who has deployed our funds for regional housing projects. Taken together, these efforts demonstrate how **we use a variety of resources to better support the housing challenges facing our region**. "One thing I appreciate about the Community Foundation is that there is a clear commitment to advance affordable housing projects as funding partners."

- Sakura Takano, CEO, Rotary Charities

"One thing I appreciate about the Community Foundation is that there is a clear commitment to advance affordable housing projects as funding partners," said Sakura Takano, CEO of Rotary Charities of Traverse City. "Having more funders prioritize housing and investing more resources beyond grant dollars can multiply the impact our organizations can have on our region."

With Rotary Charities, we've brought together community members and leaders as part of the Homelessness Collective, including the City of Traverse City, Grand Traverse County, Goodwill Northern Michigan, Jubilee House, Munson Healthcare, Northwest Michigan Coalition to End Homelessness, the Traverse City Police Department Quick Response Team, and neighborhood associations. Together, we successfully raised money from a variety of funders to support sanitary and safety improvements at the Pines, a wooded area in Traverse City where homeless community members find shelter. We also advocated at the city and county levels for funding that would support Safe Harbor's transition to a year-round emergency shelter.

This advocacy has been paired with supporting housing policy and funding at the state level with the Community Development Coalition, a group of over 40 business, governmental, and nonprofit leaders across the region that we bring together. During our inaugural Advocacy Day at the State Capitol, we met with legislative officials and state department heads, asking for funding to support a collaborative housing development project brought forth by our local schools who have had trouble retaining teaching and administrative staff talent due to the lack of housing.

"At the end of the day, it's up to us—collectively as funders, nonprofits, governmental entities, businesses, and community members—to support housing solutions," said David Mengebier, our President and CEO. "Working together across sectors allows us to have a unified voice to support housing access for local individuals and families, allowing us to keep striving towards a healthy, resilient, thriving region for all."



# BETTER GIVING for a better future.

Join us to grow resources for the people and places of our local communities. By becoming a Community Funds supporter, you can be part of creating bigger change for our region.

Only together can we make a difference, now and forever.

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# *collective giving*. MEANINGFUL GRANTING.

## lasting impact.

We build upon donor generosity by adding value and impact to every gift. We invest these gifts, steward endowments to generate ongoing granting to our local communities, and make strategic grants to support positive growth and make life better for everyone living here.

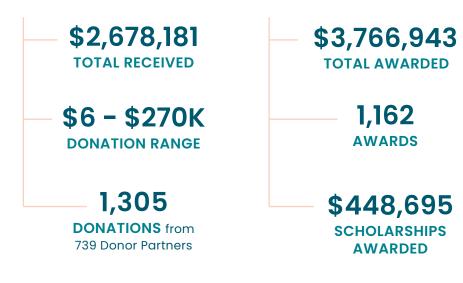
We connect donor passion with opportunities for community benefit so every gift makes a difference close to home. Gifts of all sizes make a meaningful difference and provide broad support for our community in the areas of arts and culture, education, environment, health and human services, youth, and more.

"Everyone needs a helping hand at some point during their life. The Community Foundation is a great avenue to provide that helping hand when a neighbor needs it the most."

-Kris Thomas, Donor Partner

#### **2024 GIFTS**

#### **2024 GRANTS & SCHOLARSHIPS**



## **INVESTMENTS**

We invest dollars entrusted to us through long-term and short-term strategies that allow us to return a portion back to our communities today and ensure the sustainability of the funds for the future.

actual

benchmark

 13.3%

 13.4%

 3 YEAR

 4.2%

 3.8%

 5 YEAR

 8.3%

 8.0%

#### ASSETS

2024 Total Assets = \$105,324,426

**Investment Returns** 

vs. Benchmark





#### **IMPACT INVESTING**

Impact investing is an important tool that helps expand our sources of community support. It allows us to support small businesses and strengthen the local economy, which are both critical to our region's vitality.



# THE COMMUNITY FOUNDATION board

#### **BOARD** officers

**Jerry Ring,** Chair, Grand Traverse County

Laura Asiala, Vice-Chair, Antrim County

Marshall Collins, Secretary, Leelanau County

Beth Dunckel, Treasurer, Grand Traverse County

#### **BOARD** of directors

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#### LEELANAU COUNTY

Terry Beamsley Marshall Collins Kira Davis Edward Lanphier Ranve Martinson Larry Nelson

Additionally, thank you to the following community members for their years of service on the Board:

Megan Royle Carrella JoAnne Cook Mark Irwin Carol Marsh Dan Phillips



#### THE COMMUNITY FOUNDATION team

#### **Staff** (listed in order of photo, from left to right)

Paul Kester, Vice President of Finance & Administration
Mercedes Bowyer, Donor Engagement Director
Brittany Morton-Smith, Operations & Grants Coordinator
Kristina Pepelko, Communications Manager
David Mengebier, President & CEO
Alison Metiva, Chief Operating Officer
Torey Caviston, Youth & Community Impact Coordinator
Steve Wade, Vice President of Community Impact
Joan Hughes, Administrative Donor Support Services Associate
Pam Amundsen, Donor Services Manager
Gina Thornbury, Senior Community Impact Manager

#### **Annual Report Credits**

#### Design – Brand Tonic

Copywriting - Alex Dailey, Jen DeMoss, Kristina Pepelko

Story & Data Contributors – Addiction Treatment Services, Torey Caviston, Child & Family Services, Mike Dively, Habitat for Humanity GT Region, Ruth Hoppe, Housing North, Paul Kester, Ella Knudsen, Aubrey Manchester, David Mengebier, Alison Metiva, Michael's Place, Northwest Michigan Supportive Housing, Yasmin Richmond, Jerry Ring, The Rock of Kingsley, Rotary Charities, Bill & Mary Smith, Gina Thornbury

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# Grand Traverse Regional COMMUNITY FOUNDATION

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# THRIVING COMMUNITIES,



Give today or plan for a future gift.

**CONNECT** with us

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