



Petoskey-Harbor Springs Area
community foundation

2020|21 ANNUAL REPORT

Together in community

How do we summarize a year that was universally difficult yet made up of challenges unique to each person, family, business, agency, or nonprofit? The phrase we are all in the same storm but not necessarily the same boat comes to mind.

As the storm rolled in more than a year ago, the Community Foundation considered how we could respond. We are uniquely positioned to help, but where to begin when so much was uncertain? By the end of March 2020, the foundation staff, and board of directors officially mobilized our existing Essential Needs Fund to receive donations for COVID-19 relief. Thanks to generous donations from throughout our community, we were able to get grant dollars out the door quickly.

Our nonprofit and education partners served as great examples of resilience as they adapted to rapidly changing situations. Thanks to these partners, we were able to hear about how the pandemic was impacting their organization, agency, or school as well as their people. They shared their needs and their insights, leading us to adapt one of our grant cycles to accept only requests for general operating dollars. As a place-based grantmaker, this was right in our wheelhouse.

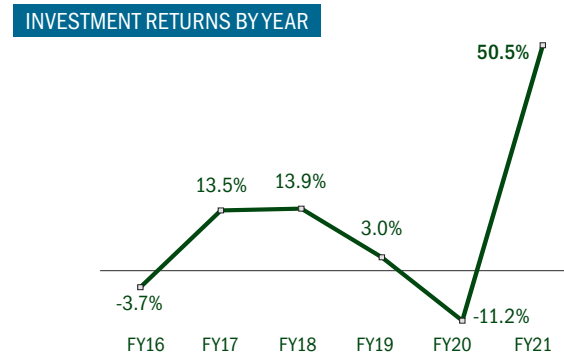
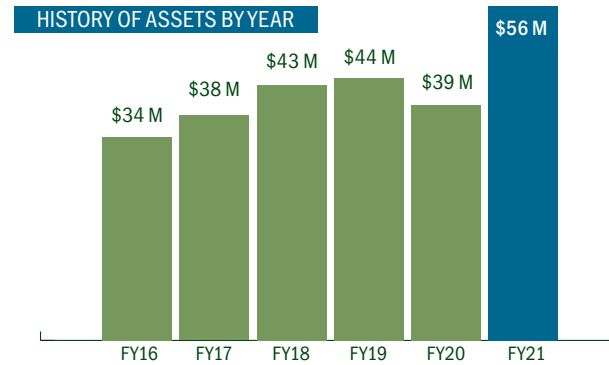
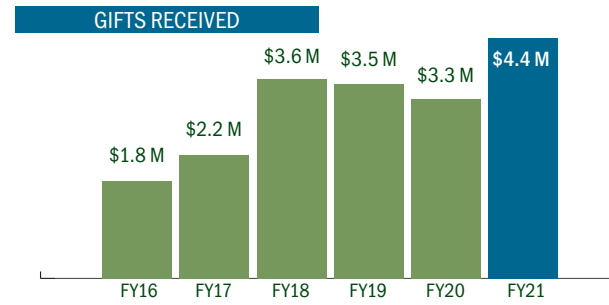
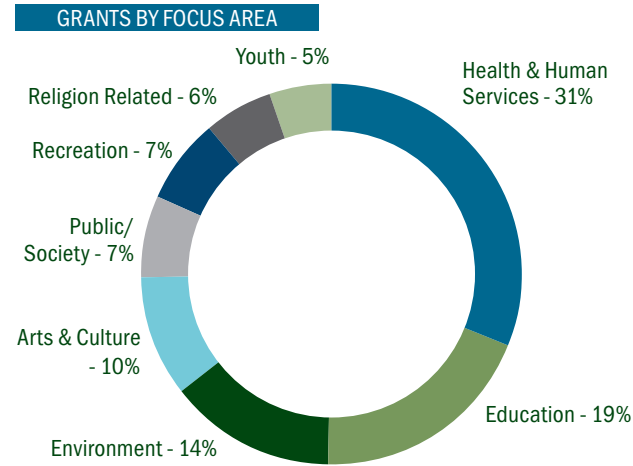
But as the needs of our community stretched further and wider, we looked for other opportunities to help. Through new, creative partnerships, we were able to support individuals, families and small businesses in Emmet County in new ways. We helped a local woman keep her home out of foreclosure. We helped small businesses in our community keep their businesses going. We helped local restaurants with outdoor dining adaptations, and funded efforts to support restaurant workers and local musicians.

All of this work was made possible by you: thank you! Acknowledging the remarkable hardships of the past year allows us to also acknowledge the generosity and caring we witnessed in our community. Although we didn't do so physically, we came together last year as a community. And in that spirit, we will continue to bring the community together to meet needs and address shared issues to improve the quality of life for all people in Emmet County. Together, we can do more.



David L. Jones
Executive Director

Hon. Jennifer E. Deegan
President
Board of Directors



SNAPSHOT

\$3.9 million

GRANTS OUT BY FOCUS AREA

\$4.4 million

**IN GIFTS RECEIVED
1,203 TOTAL GIFTS**

\$56 million

NET ASSETS

+50.5%

INVESTMENT PERFORMANCE

All figures are for Fiscal Year 2021, ended March 31, 2021.

Our audited financial statements and IRS Form 990 are available on our website, www.phsacf.org. You may also contact our office for copies, (231) 348-5820.



Relief. Response. Recovery.

MADE POSSIBLE BY THE EXCEPTIONAL GENEROSITY OF OUR COMMUNITY, THE COMMUNITY FOUNDATION GRANTED NEARLY \$350,000 IN COVID-19 RELIEF DOLLARS DURING THE LAST FISCAL YEAR, GRANTS WHICH STILL CONTINUE TODAY.

One COVID-19 Relief grant to McLaren Northern Michigan Foundation helped purchase powered air purifying respirators or PAPRs for McLaren staff. **Top left:** Kari Ataman, RN, wears one of the PAPRs which provide greater safety to anyone working in patient care areas where they have the potential to come into contact with a contagious disease including COVID-19, the flu, or any other respiratory illness. **Bottom left:** McLaren staff shared their thanks with the community for supporting the purchase of PAPRs.

Photos courtesy McLaren Northern Michigan



When we opened our Essential Needs Fund to accept new gifts toward COVID-19 relief in March 2020, so much seemed uncertain. What we witnessed was our generous community stepping up to help meet a wide variety of needs. For some organizations, their needs included personal protection equipment (PPE) for staff and clients. For others, it meant making up for lost revenue due to temporarily closed sites or canceled events. For others, their greatest needs were meeting increased demand for services. The nearly \$350,000 in relief grants helped to meet these needs.

Beginning in early April 2020, we reviewed relief requests and sent grant dollars out the door on a weekly basis. Nonprofits, municipalities and schools all adapted to serve their mission and their people in new ways. For some organizations, virtual solutions such as telehealth visits, remote work, or online programming were the answer. Others met their missions through mobile and drive-through food banks or just getting people outdoors for physical and mental wellness.

\$349,400

RELIEF GRANTS
AWARDED
FISCAL YEAR 2021

47

ORGANIZATIONS
SUPPORTED

\$195,362

RELIEF GIFTS
RECEIVED
FISCAL YEAR 2021

\$225,000

OUR FOUNDATION
DOLLARS EARMARKED
FOR COVID-19 RELIEF

All figures are for Fiscal Year 2021, ended March 31, 2021.

For a complete list of our COVID-19 relief and response grant recipients, please visit our website, www.phsacf.org.



It's wonderful to have general dollars available so we have the capacity to serve clients. When we are fully staffed, we can best meet the needs of the community.

Gail Kloss

Women's Resource Center of Northern Michigan

We are thankful that the Community Foundation has listened to what we need and has been so flexible with funding.

Elizabeth Looze

Challenge Mountain

We are all so grateful for the Community Foundation recognizing how challenging and multifaceted our needs are in this sector.

Izabela Babinska

McLaren Northern Michigan Foundation



Adaptability. Flexibility.

ONE ORGANIZATION SAID OF THE PAST YEAR 'IT WAS BUSINESS AS UNUSUAL.' WITH A NOD TO OUR PARTNERS ADAPTING TO RAPIDLY CHANGING CIRCUMSTANCES, THE COMMUNITY FOUNDATION LISTENED AND FOUND OUR CHANCE TO DO BUSINESS AS UNUSUAL.

No one better understood the changing and varied needs of nonprofits during the pandemic than the people at those organizations. During the summer of 2020, we hosted virtual check-ins to hear from our colleagues. Their feedback prompted us to alter our Fall 2020 grant cycle to accept requests for general operating dollars; funds that could be spent on salaries and wages, office rent or mortgage payments, office utilities or other general expenses. During this cycle, we granted nearly \$240,000 in general operating dollars to 37 nonprofits and schools. This flexibility allowed our partners to meet their particular needs which varied widely across sectors.

The economic crisis that accompanied the early days of the pandemic was particularly challenging for our community's small businesses. Through a creative partnership with Venture North Funding and Development, a nonprofit and a certified Community Development Financial Institution (CDFI), we helped bring relief grants to small business owners in Emmet County. In December 2020, Venture North awarded \$64,250 from its Regional Resiliency Program to 16 small businesses in our community.



Sandra's Story

In July 2020 using COVID-19 relief dollars, the Community Foundation partnered with TrueNorth Community Services, based in Fremont, Michigan, to establish a utility and housing relief fund. The fund, created specifically for Emmet County residents, has already assisted 27 participants including Sandra. Relief funds are still available—for more information, please contact the Community Foundation.

Sandra found herself behind on utility bills, her mortgage, and home insurance. Life was very overwhelming and Sandra was not sure where to find all of the needed money. While dealing with financial issues, Sandra's medications were changed by her doctors which sent her into a hopeless depression.

When Sandra was told we took care of her past-due balance using our funding, her stress level went down considerably. She knew she would have the funds to pay the rest of her bills and to stay in her home. She could look at her problems with a clearer head, and things did not seem so overwhelming.

Sandra has been able to keep up on payments since we assisted. She feels like she is back on track and can focus on her health. Sandra is very thankful for the assistance that we gave her and will look at giving back to the community when she can.

TrueNorth Community Services

Investing in housing

ATTAINABLE HOUSING
REMAINS A CRITICAL
ISSUE IN EMMET COUNTY,
INEXTRICABLY LINKED
WITH OTHER ISSUES LIKE
WORKFORCE SHORTAGES,
PUBLIC TRANSIT AND
CHILD CARE. WE
CONTINUE TO PARTNER
WITH OTHER COMMUNITY
ORGANIZATIONS IN FINDING
EQUITABLE SOLUTIONS.



Continuing our commitment to housing in Emmet County, the Community Foundation approved a short-term, zero-interest loan of \$120,000 to Northwest Michigan Habitat for Humanity in September 2020. The loan, now fully repaid, allowed Habitat to purchase a modular-style home for one of its lots in Oden. This partnership also launched Habitat's Home Ready Program, designed to provide affordable housing options for those who are "mortgage ready" but struggling to find housing in their price range.

"Habitat is committed to bringing more affordable housing to our communities here in northwest Michigan," said Sarah

Ulrich, Habitat's Executive Director. "To make this possible, we must be creative and employ cross-sector partnerships."

This loan, a program-related investment (PRI) of the Community Foundation, allowed Habitat to purchase its first high-quality, factory stick-built home keeping the process both efficient and affordable. In January 2021, the home was delivered and set on property in Oden (pictured above), land that was donated to Habitat by the Emmet County Land Bank.

The Community Foundation has been working alongside Habitat for several years as members of the Little

Traverse Bay Housing Partnership. The Partnership is actively working toward housing solutions that overcome challenges like high rents, low wages, seasonal work, and the rising costs of building a new home.

Last year, the Community Foundation made a grant to Habitat from our relatively new Emmet Housing Solutions Fund. The \$20,000 grant helped offset some unexpected infrastructure costs at the Oden and Alanson home build sites. Launched in 2019, our Emmet Housing Solutions Fund was created to help address the myriad pre-development costs to developing attainable housing in our community.

Investing in youth

19

EMMET COUNTY TEENS

\$112,963

GRANTS RECOMMENDED
FISCAL YEAR 2021

\$25,000

EARMARKED FOR
COVID-19 RELIEF &
RESPONSE

18

ORGANIZATIONS
SUPPORTED

THROUGH THE CHALLENGES AND HURDLES OF THE PAST YEAR, OUR YOUTH ADVISORY COMMITTEE (YAC) MEMBERS MET EACH ONE, REMAINING FOCUSED ON THE NEEDS OF YOUTH AND FAMILIES IN EMMET COUNTY.

Adaptability was key for this remarkable group of teenagers. Beginning in the spring of 2020, these students worked through mandated school closures, quarantine, and virtual meetings.

Their commitment to community grantmaking meant that young children in the Village of Alanson could enjoy a new, age-appropriate playground in Civic Park. Their peers who were impacted by not having regular school meals received needed assistance thanks to the YAC's support of the Northmen Den, serving middle and high school students from Petoskey.

The pandemic arrived as the YAC was concluding its 25th anniversary year. With a special anniversary project hampered by school closures, the committee unanimously agreed to earmark that \$25,000 for COVID-19 relief and response grants.



YOUTH ADVISORY COMMITTEE

Alex Carlson
Suzy Carpenter
Liv Cerrudo*
Ella Deegan*
Abigail Donovan
Heidi Dumas
Anna Dundon
Cadence Glass
Will Goelz
Ellie Jones*
Sarah Liederbach*
J.J. Marshall
Beatriz Miranda
Quinn O'Neill
Ethan Schumaker*
Paige Simard*
James Stebelton
Luke Sumpter*
Kyla Wang*

Chris Cerrudo, Advisor
Sarah Ford, Advisor

*Class of 2021
Graduating Seniors



PEOPLE



BOARD OF DIRECTORS

Dana Andrews,
Secretary*
Jennifer Attie
Steven Boeckman
Robert Charlton
(deceased)
Jennifer Deegan,
President*
Kathryn Erber*
James Ford,
Vice President*
Robert Keedy
Janet Mancinelli
Webb Martin
Emerson Meyer
Melissa Nguyen,
Treasurer*
Mary Rapin
Sarah Shuman
Paige Simard
B. Thomas Smith Jr.
*Executive Committee

GRANT DISTRIBUTION

Jennifer Attie
Steven Boeckman
Carla Crockett
Steve Cross
Will Henagan
Robert Keedy
Webb Martin

OUR STAFF (l to r):

Loriel Grigsby,
Laurissa Wendland,
David “DJ” Jones,
Sarah Ford,
Kassia Perpich, and
Mary Cummings.

NOMINATING

Jennifer Attie
Jennifer Deegan
James Ford
Maureen Nicholson
James Ramer

FINANCE

Steven Boeckman
Daniel Clarke
Denise Croake
Clark Elwood
John Fought
Melissa Nguyen
Todd Winnell

INVESTMENT

Dana Andrews
Courtney Font
Webb Martin
Emerson Meyer
Maureen Nicholson
Jeffrey Shepard
B. Thomas Smith Jr.

COMMUNITY IMPACT

Daniel Clarke
Jennifer Deegan

James Ford

Webb Martin
Emerson Meyer
Sarah Shuman
Todd Winnell

MARKETING AND DEVELOPMENT

Robert Charlton
Charles Gano
Susan Howbert
Virginia McCoy
William Meengs, Jr.
Emerson Meyer
James Schroeder
Sarah Shuman

LITTLE TRAVERSE BAY PROTECTION AND RESTORATION

Jennifer Attie
Mary Campbell
Frank Ettawageshik
James Ford
Doug Larson

SCHOLARSHIP

Dana Andrews

Maggie Kloss

Mary Rapin
Sarah Shuman
Joelle Drader Wilcox

KIWANIS CLUB OF HARBOR SPRINGS SCHOLARSHIP

Rob Carr
Mary Catherine Hannah
Charles Stockton
Damon Whitfield

JENNIFER KULLIK MEMORIAL SCHOLARSHIP

Holly Angileri
Michael Angileri
Julie Biddick
Ken Biddick
Bill Frazier
Larry Gunderson
Sue Gunderson
Deb Kullik
Mary Lieberman
Richard Lund
Chris Nicholson
Terry Carlson-Steinmetz



OUR FUNDS

COMMUNITY FUNDS

Roma Walstrom Bolline Fund
Sally and John Clark Fund
Catherine G. Curran Fund
Curtis Family Fund
Drost Community Fund
Suzanne G. Felt Fund
Fund for the Community
Hi and Joedy Hall Fund
Gladys and Jack Hamill Fund
Bonnie Hess Fund
Robert Horner Fund
Donald Hufford Endowment Fund
Marilyn M. Icke Fund
Impact Investing Fund
David H. Irish Charitable Fund
Fred and Joyce Koehler Family Fund
Lent Family Fund
Lotspeich Family Fund
Matt Mathias (Emer A. Mathias) Memorial Fund
Marge May Fund
Pearl E. McPike Charitable Fund
Thomas S. and Ellen K. Noneman Fund
Albert and Carol Osborn Memorial Fund
Frances Hamilton Schirmer Fund
Frances and Jeffrey Shepard Fund
Budd and Shirlee Tallberg Charitable Fund
Hugh D. Winnell Fund
Jack and Elayne Zaiger Family Fund

COMMUNITY GIVING CIRCLES

Birchwood Outreach Fund
Harbor Cup Charitable Fund – Team Boyne
Harbor Cup Charitable Fund – Team Harbor
L'Arbre Croche Fund
Sunrise Rotary Charitable Fund

DONOR ADVISED FUNDS

David and Brenda Bell Family Fund
Neil T. and Marsha L. Bidwell Charitable Fund
Biltz Family Community Fund
B.J. Shawn and Becky Kranig Fund
Blanchard Family Fund
Bleyaert Family Fund
Bund Family Fund
Buzzelli Family Charitable Fund
Byers Family Charitable Fund
Tom and Susie Carruthers Fund
Dan and Linda CasaSanta Family Fund
Catalina Starlight Fund
Maggie and Bob Charlton Family Fund
Chermide Family Fund
Circuit Controls Corporation Charitable Fund
Perry D. and Karen L. Clark Fund
Clarke Family Fund
Julie and Murray Cotter Family Fund
Deborah and David Deal Gift Fund
Donovan Charitable Fund of Harbor Springs
Jack Michael Duff Memorial Fund
Mike and Cheryl Eberhart Family Fund
Edgewater Community Fund
Erickson Family Fund
Everyone Matters Fund
Michael J. and Marjorie K. FitzSimons Fund
Chip and Jean Frentz Family Fund
Ted and Brenda Frey Donor Advised Fund
William Frey Charitable Fund
Frey Foundation Fund
Gano Family Fund
Jack Garber Family Fund
Gijigowi Fund
William and Louise Graham Fund
Patti and Balky Grannis Family Fund
Hameister Family Charitable Fund



Kelsie King-Duff and Joe Duff established the **Jack Michael Duff Memorial Fund** last year in memory of their son, on the occasion of his first birthday. Jack was stillborn at 23 weeks on June 25, 2019, due to L1 Syndrome, a rare genetic disorder. “We love that the community foundation would provide us a way to honor him forever, and that with our fund we can make grants to organizations that help create the adventures in Northern Michigan we were dreaming about. We hope to one day take future children to the places or to see projects supported through Jack’s fund, knowing that he will be there with us.”

FUNDS

Hanna-Renkes Literary Guild Fund
 William H. and Louise T. Harrison Fund
 Barbara and Jerome Hoganson Fund
 Holder Family Foundation Fund
 Dr. H. Ross and Virginia G. Hume Charitable Fund
 Ann K. Irish Charitable Fund
 Thomas and Patricia Jeffs Fund
 Mary Clare Reynolds Joyce Fund
 Cathy Kalahar and David Evrard Charitable Fund
 Keller Flaherty Family Fund
 Everett and Lois Kircher Family Fund
 Knowlton Family Fund
 Kroeger-Mainland Family Fund
Ledyard Family Charitable Fund
 Loyd Family Fund
 Lutjens Family Fund
 The Mainland Family Fund
 McKinney Family Charitable Fund
 Meyerson Family Tzedakah Fund
 Maude and Gorton Milliken Fund
 Jim and Trish Murray Charitable Fund
 Steve and Anne Murray Charitable Fund
 Mort Neff Family Fund
 Neithercut Family Fund
 Nelson-Dennis Family Fund
 Ted and Lori Pall Charitable Fund
 Todd and Kathy Petersen Charitable Fund
 Craig and Mary Rapin Family Fund
 Petoskey Rotary Charities Fund
 Petoskey Rotary Park Fund
 John D. Pickering Fund for Equal Parenting
 Scholl Family Fund
 Bob Schulze Fund for Creative Writing
 Roger E. and Peggy Dicken Schwer Fund
 Linda Sheppard Nurses Fund
 Mary Lou and Tom Smith Family Fund
 Scott and Dibby Smith Family Fund
 Stafford and Janice Smith Family Fund
 Susan Irish Stewart Charitable Fund
 Sturgeon River Pottery Fund for Education
 in Visual Arts
 Tanton Family Fund
 Marana Webber Tost Charitable Fund
 VandenBrink Biddick Family Fund
 Brian and Dawn Wagner Charitable Fund
 Walstrom Marine Charitable Fund
 Winnell Family Fund
 Marjorie A. Winnell Healing Center Fund for
 Complementary Medicine
 David and Barbara Young Fund

FIELD OF INTEREST FUNDS

Jerolene and Lewis Brown Charitable Youth Fund
 Carpenter Family Fund
 Emmet Housing Solutions Fund
 Environmental Education Fund
 Essential Needs Fund
 Fund for Youth
 Deb Greenwald Foster Family Care and Support
 Fund
 Healthy Community Fund
 Robert Horner Fund for Natural Resource
 Conservation
 Jeff Kring Outdoor Youth Education Fund
 Little Traverse Bay Protection and Restoration Fund
 Dree Look Lo Tennis Fund
 Matt Mathias (Emer A. Mathias) Fund for
 Conservation
 Northern Michigan Housing Fund
 Schulze-Stern Fund for Young People
 Science for the Future Fund
 Dorothy Scott Fund for Senior Citizens
 Shoreline Fund
 Urban Forestry Fund
 Ward & Eis Elder's Project Fund
 Zonta Women and Children's Fund

SPECIAL PROJECT FUNDS

Arctic Grayling Reintroduction Fund
 Petoskey Swimming Pool Fund
 Petoskey Tennis Courts Fund
 Petoskey Community Pool Fund
 Riverbend Park Pickleball Project Fund

DESIGNATED & ORGANIZATIONAL FUNDS

Administrative Endowment Fund
 Animal Security Fund
 Mary Askew Memorial Fund
 Bay Bluffs Endowment Fund
 Bay View Association Endowment Fund
 Clancy Bellmer IOOF Little League Fund
 Blissfest Endowment Fund
 Benjamin B. Blum Lodging Assistance Fund
 Agatha O. Boettger Senior Citizens Fund
 Camp Daggett Fund
Camp Daggett Klopocic Family Campership Fund
 Challenge Mountain-Spirit Day Camp Fund
 Char-Em United Way Endowment Fund
 Child and Family Services of Northwestern Michigan
 Fund
 Concord Family Association Fund
 Crooked Tree Arts Council Cultural Fund
 Emmet-Charlevoix Bar Foundation Fund
 Emmanuel Episcopal Church Bequest Fund
 Emmanuel Episcopal Church Endowment Fund

Emmet County Lakeshore Endowment Fund
 First Presbyterian Church of Harbor Springs Bequest
 Fund
 First Presbyterian Church of Harbor Springs
 Endowment Fund
 First Presbyterian Church of Petoskey Endowment
 Fund
 First Tee Fund
Foster-Hartley Lake Preserve Stewardship Fund
 Friendship Centers of Emmet County Endowment
 Fund
 James N. Gamble Family Fund
 William C. and Jennie S. Germond Fund
 Great Lakes Chamber Orchestra Endowment Fund
**Marjorie E. Green Fund for Little Traverse Bay
 Humane Society**
 Harbor Area Housing Fund
 Harbor Springs Area Historical Society Endowment
 Fund
 Harbor Springs Education Foundation Fund
 Harbor Springs Library Endowment Fund
 Harbor Springs High School Band Boosters Fund
 Land and Water Education Fund
 Petoskey Lions Club Fund
 Little Traverse Civic Theatre/Ross Stoakes Memorial
 Fund
 Little Traverse Historical Society and Museum Fund
 Little Traverse Choral Society Endowment Fund
 Little Traverse Sailors Endowment Fund
 Manna Project Endowment Fund
 Steve and Molly Kircher Fund for Manna
 Manna Fund

FUNDS

Emer A. Mathias NCMC Foundation Fund
 Matt Mathias (Emer A. Mathias) Memorial Fund for
 Camp Daggett
 Matt Mathias (Emer A. Mathias) Memorial Fund for
 Little Traverse Historical Society
 Matt Mathias (Emer A. Mathias) Memorial
 Scholarship Fund
 Otho J. Mathias Scholarship Fund
 Michigan Dyslexia Institute - Northern Michigan
 Center Endowment Fund
 Wil Moyer Music Scholarship Fund
 Nehemiah Project Endowment Fund
 Nehemiah Project Fund
 New Life Anglican Church Endowment Fund
 North Central Michigan College Foundation Special
 Project Fund
 Northern Community Mediation Fund
 Northern Community Mediation Endowment Fund
 Northern Michigan Fund
 Northwest Michigan Food for Humanity Fund
 Northwest Michigan Habitat for Humanity Fund
 Albert and Carol Osborn Memorial Fund for the
 Friendship Centers of Emmet County
 Petoskey Education Foundation Fund
 Petoskey Area Garden Club Endowment Fund
 Petoskey District Library Fund
 Planned Parenthood Northern Michigan Fund
 SAFE in Northern Michigan Fund



In August 2020, the **Riverbend Park Pickleball Project** officially opened two brand new, dedicated pickleball courts. Located at The City of Petoskey's Riverbend Park on Standish Avenue, the courts were a labor of love for the Little Traverse Bay (LTBA) Pickleball Players. The Community Foundation proudly served as a fiscal sponsor for this special project and congratulates the people and organizations who made it possible.

FUNDS

Scenic Michigan Endowment Fund
George Armstrong Spirit Day Camp Endowment Fund
St. Francis Xavier Endowment Fund
Ann Smith Charitable Fund
Tip of the Mitt Watershed Council Water Quality Fund
Top of Michigan Trails Council Fund



Dave and Debbie Deal

have deep roots along the shores of Walloon Lake. Debbie's father, now age 91, first came to northern Michigan as a teenager at Camp Sherwood (now part of Camp Michiganiana).

Dave and Debbie are also deeply rooted in philanthropy and were early adopters of the donor advised fund, setting up a fund at Fidelity some 20 years ago. Through their long-time friend and fellow Wallooner, the late Bob Charlton, the Deals were introduced to the Community Foundation. What started with a conversation about pickleball courts led to Dave and Debbie learning much more about the foundation's work in the community they love.

"Our primary motivator in moving our fund was seeing the breadth of the work the foundation does in the community. It's so extensive." Now the Deals' commitment to the foundation has extended to their estate plans. "With a planned gift, we can continue to support the organization into the future as well as after we are gone."

Walloon Lake Trust and Conservancy Fund
Hugh D. Winnell Scholarship Fund in Memory of Vera Jean and Marjorie Winnell for Kiwanis of Petoskey
Hugh D. Winnell Scholarship Fund in Memory of Vera Jean and Marjorie Winnell for North Central Michigan College
Hugh D. Winnell Scholarship Fund in Memory of Vera Jean and Marjorie Winnell for Petoskey Education Foundation
Women's Resource Center of Northern Michigan Endowment Fund
Women's Resource Center Jan Mancinelli Operations Fund
Women's Resource Center Operations Fund

CHARITABLE GIFT ANNUITIES

James and Carolyn Cloutier Charitable Gift Annuity
Jennifer Eis Charitable Gift Annuity
Gladys Hamill Charitable Gift Annuities
Sharon Walker Charitable Gift Annuity

SCHOLARSHIP FUNDS

Alberto Moreno Memorial Scholarship Fund
Baiardi Family Foundation Scholarship Fund
Scott Batchelor Scholarship Fund
Café Society Educational Fund
James and Carolyn Cloutier Scholarship Fund
Thomas Dale Sr. Memorial Scholarship Fund
Robert Jensen Dau Memorial Scholarship Fund
First Tee Scholarship Fund
Anna Funk Memorial Scholarship Fund
Janet and Richard Gorman Scholarship Fund
Gerald Gramzay-Stafford's Hospitality Culinary Scholarship Fund
Harbor Springs Opportunity Scholarship Fund
Home Builders Association of Northern Michigan Building Industry Career Scholarship Fund
Barry Potter/HOPE Scholarship Fund
Amy Elizabeth Kelbel Scholarship Fund
Kiwanis of Harbor Springs Scholarship Fund
Jennifer A. Kullik Memorial Scholarship Fund
Sara J. Latimer Redpath Church Memorial Scholarship Fund
Marshall-Parker Family Scholarship Fund
Marshall-Smith Scholarship Fund
C. W. McClellan Scholarship Fund
Mary McClutchey Amacher Scholarship Fund
Olofsson Family Scholarship Fund
Petoskey Area Business and Professional Women's (BPW) Scholarship Fund
Michael Gale Phillips Memorial Scholarship Fund
Stafford and Janice Smith Scholarship Fund

BOLD indicates new funds

DONORS

You make it possible

2020 Bay View Dock and Basketball Court Yoga Group
Linda Adams
Jodi and Tom Adams
Doug and Anne Albrecht
Dr. Anthony and Dr. Lauren Alessi
Steve and Renee Alexandrowski
Jason and Suzanne Allen
AmazonSmile
American Junior Golf Foundation
Diane Anderson
Kurt and Carrie Anderson
Mary B. Andersen
Shirley Anderson
Dana F. Andrews
Holly Angileri
Anonymous (16)
Robert and Cherri Anthony
Mark and Denise Antonishen
Joanne N. Arbaugh
Julie M. Ard
Meredith Arneil
Bruce and Sharon Ashley
Barry and Jeanette Aspenleiter
Kal and Jenni Attie
Thomas and Dale Auffmanberg
Jeffrey and Barbara Austin
Margaret and Donald Austin Family Foundation
Dick and Annette Babcock
John Bade
Baiardi Family Foundation, Inc.
Mary J. Baird
Michael and Nancy Baity
Deb Baker
Debra P. Baker
Jack and Susie Baker
Richard and Barbara Baker
Sandra Baker
Mr. and Mrs. Ronald C. Baldwin
Leslie Banks
Darryl and Maryle Barbe
Paul and Nancy Barker
Steve Barney
Mark and Devra Barrett
David and Robyn Barrie
Elaine A. Barritt
Steve Bartha and Elena Forzani
David Barton
Scott and Laura Batchelor
Steve Bayes
Bay North Realty
Bay View Association Morning Council
Howard Beck and Margaret Brazones
Roger and Jean* Beckley
Carl Bellman and Susan Baker

Jeffrey and Laura Bennett
Lyn and David Berelsman
Jen Berg
Alan and Barbara Berlin
John Bernardin
Beyer Family Foundation
Ed and Karen Bezilla
The Bezilla Family
Mary Biagini
Stephen and Katharine Biggs
George and Beverly Biltz
Elizabeth Bishop
Cathy and Mark Bissell
Robert and Elizabeth Bitterman
Jobst Blachy
Blackbaud Inc.
John Blair
Lisa and Paul Blanchard
Sally Blanchard
Edward and Debra Blews
Steve and Kathy Boeckman
Larry and Joanne Boerman
Daniel and Elizabeth Bogo
David and Jeanette Borchers
The Borland Foundation
Pier and Renee Borra
Doug Boyer and Family
Doug and Kathy Boyer
Terry Gamble and Peter Boyer Fund, San Francisco Foundation
Sean and Jennifer Boyle
John and Janet Boyles
Boyne Resorts
Timothy and Cindy Brammer
Alida Breen
Nancy Breighner
Christopher and Karen Brieden
Dale and Kayla Briggs
Robert Briggs
Rhonda Brooks
The Broughman Family
Bill and Shannon Brower
Jenny Brower
Brown Motors
Norma Brown
Steve and Holly Brown
Noel Bufe and Mary Tyson
Sally and Ian Bund
John Bunge and Cynthia Nelson
William Burgess and Kathryn Wood
Jerome and Erin Burns
Ann Joslyn Burrows
David and Barbara Buzzelli
Walt and Nancy Byers
James and AnnMarie Campisi
Jeanne and Howard Canada

Susan and Russ Capaldi
David and Debra Carlson
Elizabeth Carpenter
Lynne Carpenter
Pamela and Glen Carpenter
Russell and Christine Carpenter
Joan M. Carr
Tyler Carr
Jack and Donna Carruthers
Susan B. Carruthers
Dan and Linda CasaSanta
Tom and Janet Cattel
Challenge Mountain
Richard and Carolyn Chambers
Sue Chambers
Charles Stewart Mott Foundation
Todd Chinnock and Emma Lesnick
Bill and Jenny Chope
Robert and Beth Christians
Mike Chumbler
Lisa Cicinelli
Daniel and Deborah Clarke
Daniel and Laurel Clarke
David and Gail Clarke
James and Patricia Clarke
Robert and Susan Clarke
John and Mary Clark
John and Nancy Clark
Richard C. Clark Jr.
James and Carolyn Cloutier
William and Carole Cobb
Sarah and Don Cohen
Eric and Donna Collins
Keith Collins
Mark Collins and Deborah Forbush
Community Foundation of Collier County
Torrie Condet
Jim and Ardyce Conley
Tom and Laura Conrad
Consumers Energy Foundation
Richard and Carol Cook
John and Mariette Cooper
Thomas and Beth Cooper
Charlotte Corbett
Michael Costello
Cottage Company of Harbor Springs
Council of Michigan Foundations
Colby Crall
Audrey Criner
Jack and Marilyn Crotty
Randy and Lorelei Croyle
Mr. and Mrs. David M. Culver
Mary Cummings
Al and Jane Damschroder
Tom and Connie Dansbury

DONORS

Patricia Danzo
 Robert Jensen Dau Foundation
 Joseph Davies
 S. B. and Anne Davis
 Amelie Dawson
 Trudy Day
 Guy and Caryn Dearing
 Bruce and Joanne Deckinga
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We are grateful for your financial support, particularly in a year so challenging for so many. Your name is important to us. If your name is incorrect or omitted, please let us know so we can correct our error.

This annual report reflects activity from the fiscal year ended March 31, 2021.

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BE AN ANGEL

To celebrate the 25th anniversary of Tvedten Fine Art last year, artist/owner Margaret Tvedten installed these wings outside her Harbor Springs gallery. Additionally she directed donations to our Essential Needs Fund. Visitors can snap a photo with the wings and scan the sign to make a secure, online donation. Thank you, Margaret.

For good. Forever.

John S. Clark Legacy Society

Members of the Legacy Society have pledged a gift to the Community Foundation through their will, trust, or estate plan.

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**Those noted are no longer with us, but their legacy lives on.*

In Memoriam



David H. Irish
1937-2020

The Community Foundation lost a founder and a friend last year with the passing of David H. Irish. Dave was on board with the Community Foundation from day one. As one of our founding directors in 1992, Dave shared the far-reaching vision of an organization that would support our community for the long run. Dave served on the foundation's board of directors from 1992 to 2002, the last five of those years as board president. Dave remained a supporter and champion of the foundation even after his formal role had concluded.

Of the Community Foundation, Dave said in 2011, "We don't compete with other organizations, we support them, and giving is a way to express a love of this community in a tangible and coordinated way that will leave a legacy."

Dave Irish leaves a legacy of service whether it was to the sailing world near and far or to his hometown as planning commissioner, councilman, and mayor. Both in sailing and in his other endeavors, Dave was a mentor to many. His competitive spirit paired with his kind and friendly nature made him one of a kind. Dave is greatly missed by us and by the community he so loved.



Robert W. Charlton
1952-2020

The Community Foundation lost a board member and champion with the passing of Bob Charlton last year. Bob joined the Community Foundation board in 2013 bringing 30 years of experience with The Dow Chemical Company where he retired as global vice president of public affairs and communications. Bob served for many years on the foundation's investment committee and had recently joined the marketing and development committee.

Bob was a true champion not only of our organization and our mission but also of our people and community. Bob engaged and checked in with every staff and board member, inquiring about current issues and getting traction on new programs, and always asking how we were doing. His care for our community was genuine, evidenced in his service to organizations and causes. Conversations with foundation friends reveal that Bob was the one who encouraged them to get involved with the foundation maybe by establishing a fund or giving to a specific program. Bob and his genuine enthusiasm are truly missed.

OUR MISSION

To improve the quality of life
for all people in Emmet County, by:

- Connecting donors with community needs
- Building a permanent source of charitable funds to serve our area
- Addressing a broad range of community issues through innovative grant making
- Championing philanthropy and active citizenship



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