

2022-2023 ANNUAL REPORT



Petoskey-Harbor Springs Area
community foundation



Growing with Our Community

Reflecting on last year’s milestone anniversary, your Community Foundation is reimagining and growing our role in our community. Although housing has been a constant need since we were established in 1992, we are approaching these needs differently now. Building on our early, modest grants to organizations just planting their roots in the housing space, today we are proud to work alongside established partners to find solutions to the housing crisis.

Whether tackling housing or any of the myriad issues facing our community, we know that we never work alone. Our work continues to be built on strong partnerships with nonprofit organizations, community leaders, generous individuals, families, and other funders. Together, we are building a stronger future for Emmet County. Together, thanks to you, we can do more.



David L. Jones
Executive Director

James W. Ford
President,
Board of Directors

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

Values

In striving to accomplish our mission, the staff, board, and volunteers of the Community Foundation will abide by the following core values:

- ✓ **COLLABORATION**
We seek to be a thoughtful and respected partner, to tackle issues for the greater good in Emmet County.
- ✓ **RESOURCE**
We have a proud history of connecting people, organizations, needs, know-how, and funding.
- ✓ **INCLUSION**
We know that meaningful representation and engaging the full spectrum of our community leads us to better solutions. Diversity of perspectives is an asset to any community seeking to improve the quality of life for all.
- ✓ **LEADERSHIP**
We are in a unique position to serve as a visionary catalyst for positive change. In doing so, we challenge ourselves and the status quo, and we hope to influence other leaders to innovate together.

HOUSING

Meeting a Major Community Need

Having homes for our workforce is crucial to the strength of our local economy and our community as a whole. Being able to live and work in Emmet County, however, is becoming increasingly difficult as the number and price of available homes does not meet demand. A 2023 survey commissioned by Housing North found that Emmet County needed 865 additional rental units. Between the construction of new multifamily rentals and existing rentals on the market, only a small fraction of the homes needed are available. This lack of homes across price levels directly impacts people who are working or would like to work in our community. Often it means people turn down employment in Emmet County solely because they cannot find a place to live.

[The financial pieces for a successful, sustainable housing development are complex, made more so by the high cost of land, materials, and other factors in our region.](#)

The housing crisis is not new nor is our work in housing. The Community Foundation has a track record of working alongside various community partners to find solutions to our area's housing crisis. Since 2017, we have been a core partner of the Little Traverse Bay Housing Partnership, working to bring awareness to the crisis. Throughout our organization's history, we have supported affordable housing through grants both for building homes as well as for organizations working in the housing space.



Jason Keiswetter
President, Petoskey Plastics

“The lack of housing definitely limits our candidate pool. It has also been a drawback for relocating people to the Petoskey area. The Lofts is definitely a step in the right direction.”



“Without question the housing market has had an adverse effect on employee recruiting.”



Dr. Jeffrey Leslie
Superintendent, Public Schools of Petoskey

“We’ve had several applicants who’ve declined positions because they couldn’t find affordable housing. Having the Lofts development is a great start and very encouraging.”



HOUSING

The Lofts at Lumber Square



Imagine a bustling neighborhood along the Emmet Street corridor and the Petoskey Greenway. When the Lofts at Lumber Square is completed, 165 more people will have a safe place to call home. Picture school-aged kids walking from home to a nearby school. Think of fewer help wanted signs in local business windows because there are places to live for the people in our workforce: health care workers, teachers and school staff, hospitality, retail and service staff. This vision is what the Lofts at Lumber Square will help bring to reality.

The Lofts at Lumber Square, a 60-unit workforce housing development planned for 900 Emmet Street in the city of Petoskey, has been in the works for a number of years. In July 2021, Haan Development of Harbor Springs learned that its application for low-income housing tax credits to the Michigan State Housing Development Authority (MSHDA) was unsuccessful, putting the project's future in question. Without the tax credits, the Lofts at Lumber Square faced significant hurdles to being built.

BUILDING SITE, THE LOFTS AT LUMBER SQUARE.



Working Collectively for Affordable Housing

The Community Foundation worked with Haan Development to purchase the land and develop a new plan to build the apartments, one that involves philanthropy helping to fill the funding gap. To learn more about philanthropy's role, please contact us.

Haan Development continues to act as a consultant alongside the Community Foundation and Northern Homes Community Development Corporation (CDC). Northern Homes CDC is an experienced, local, nonprofit housing organization that will own and manage the Lofts at Lumber Square. Lofts is expected to break ground in late summer or early Fall 2023.



Building Housing for Young Professionals

For a full year after accepting a new position in Harbor Springs, Alex Noble struggled to find a place to live, an all-too-common story here. "When I was applying for jobs, I noted employers were all asking 'have you figured out housing?' We almost stopped looking. We had to adjust our expectations," Alex said, "including adjusting our price range and expanding our search to surrounding communities. We are happy and grateful to have a house, but it's been a character building year, for sure."



"We need to be one of the risk takers in our community, because there are no easy problems left to solve."

David L. Jones (DJ)
Executive Director



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“The Community Foundation is an interconnected web of positivity and possibilities for the present and the future. The amount of impact is far greater than I could have imagined!”

Emerson Meyer
Board of Directors

STAFF

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Jake Myers
Loriel Grigsby
Laurissa Wendland
David 'DJ' Jones
Sarah Ford



COMMITTEES:

Dedicated to Long-Lasting Community

Throughout the year, directors and other community volunteers serve on our advisory committees, sharing their talents, knowledge, and abilities. We appreciate their time and effort!

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James Ford, Chair
Melissa Nguyen

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Doug Larson

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Virginia McCoy
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Sarah Shuman

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Michael Angileri
Julie Biddick
Ken Biddick
Terry Carlson-Steinmetz
Bill Frazier
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Sue Gunderson
Deb Kullik
Mary Lieberman
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Denise Croake
John Fought
Janet Mancinelli
Melissa Nguyen, Chair
Todd Winnell

Scholarship

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Robert Keedy
Maggie Kloss
Mary Rapin
Glen Young

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Jennifer Attie
Jennifer Deegan
James Ford
Maureen Nicholson
James Ramer





YAC Year in Review

23

EMMET COUNTY TEENS

22

ORGANIZATIONS SUPPORTED

19

GRANTS RECOMMENDED FISCAL YEAR 2023

\$97,187

IN GRANTS AWARDED FROM FUND FOR YOUTH FISCAL YEAR 2023



2022-23 YAC:

Investing in Youth

For almost 30 years, teens in Emmet County have had the opportunity to engage in community philanthropy, build their leadership skills, and engage more deeply in their community through our Youth Advisory Committee (YAC). Last year, the 23 YAC members continued their focus on youth mental health, completed several community service projects, and returned to in-person interviews for their twice-yearly grantmaking, recommending \$97,000 in grants to local organizations.



“Being a part of YAC means being a part of a group of amazing young people who care and who are pushing for progress. YAC members are driven and incredibly thoughtful, and being one of them is the greatest privilege.”

Heidi Dumas
YAC member 2019-2023

2022-23 YOUTH ADVISORY COMMITTEE

Lucia Andrews
Charlie Baker
Will Cabana*
Alex Carlson*
Taylor Dickinson
Abigail Donovan*
Heidi Dumas*
Anna Dundon*

Ainslee Glass
Cadence Glass*
Grace Hayhurst
Royce Jacobs
Quintin Janssens
Annie Jones*
Callie Keiser
Keira Lamp

Devin Marvin
Brandon Nguyen*
Sophia Nicholls
Avery Sears
Sakura Springborn
Jordan Stark*
Sara Wochoski*

Sarah Ford, Advisor
Loriel Grigsby, Advisor

*Class of 2023 Graduating Seniors
BOLD indicates YAC Officers



OUR FUNDS:

Supporting Community

COMMUNITY FUNDS

Roma Walstrom Bolline Fund
 Sally and John Clark Fund
 Catherine G. Curran Fund
 Curtis Family Fund
 Discretionary 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
Moffett Family Fund
 Thomas S. and Ellen K. Noneman Fund
 Albert and Carol Osborn Memorial Fund
 Frances Hamilton Schirmer Fund
Sue Schulze 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
 Edward Jones Community 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
 Biggs Family Charitable Fund
 Biltz Family Community Fund
 Blanchard Family Fund
 Bleyaert Family Fund
Bolton 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
 Chermshire Family Fund
 Circuit Controls Corporation Charitable Fund
 Clarke Family Fund
 Perry D. and Karen L. Clark Fund
 Julie and Murray Cotter Family Fund
Crawford Lee-Mills Fund
 Joe and Julie Damore Family Fund
 Deborah and David Deal Gift Fund
 Donovan Charitable Fund of Harbor Springs

DONOR ADVISED FUNDS CONTINUED...

Jack Michael Duff Memorial Fund
 Edgewater Community Fund
 Erickson Family Fund
 Everyone Matters Fund
 Michael J. and Marjorie K. FitzSimons Fund
 Chip and Jean Frentz Family Fund
 Frey Foundation Fund
 Ted and Brenda Frey Donor Advised Fund
 Gano Family Fund
 Jack Garber Family Fund
 Gijigowi Fund
 William and Louise Graham Fund
 Patti and Bally Grannis Family Fund
 Hameister Family Charitable Fund
 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
 Cathy Kalahar and David Evrard Charitable Fund
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 Everett and Lois Kircher Family Fund
 Knowlton Family Fund
 Kroeger-Mainland Family Fund
 Ledyard Family Charitable Fund
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 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
Ryan J. 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
 Petoskey Rotary Charities Fund
 Petoskey Rotary Park Fund
 John D. Pickering Fund for Equal Parenting
 Craig and Mary Rapin Family Fund
 Mary Clare Reynolds Joyce Fund
 Scholl Family Fund
 Bob Schulze Fund for Creative Writing
 Roger E. and Peggy Dicken Schwer Fund
 B.J. Shawn and Becky Kranig Fund
 Linda Sheppard Nurses Fund
 Mary Lou and Tom Smith Family Fund
 Scott and Dibby Smith Family Fund
 Stafford and Janice Smith Family Fund
Leslie and Mervyn Sternberg 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

Hal and Gail Willens Family 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
Lofts at Lumber Square 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
United Way Health and Human Services Fund
 Urban Forestry Fund
 Ward & Eis Elder's Project Fund
 Zonta Women and Children's Fund

SPECIAL PROJECT FUNDS

Harbor Springs Skate Park Special Project Fund
 Petoskey Community Pool Fund
 Petoskey Swimming Pool Fund
 Petoskey Tennis Courts Fund
 Winter Sports Park Fund

DESIGNATED & ORGANIZATIONAL FUNDS

Administrative Endowment Fund
 Animal Security Fund
 George Armstrong Spirit Day Camp
 Endowment 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
**Broughman Bonus and Richardson Reward
 Fund**
 Camp Daggett Fund
 Camp Daggett Klopick Family Campership Fund
 Challenge Mountain-Spirit Day Camp Fund
 Child and Family Services of Northwestern
 Michigan Fund
 Concord Family Association Fund
 Crooked Tree Arts Council Cultural Fund
 Emmanuel Episcopal Church Bequest Fund



DESIGNATED & ORGANIZATIONAL FUNDS CONTINUED...

Emmanuel Episcopal Church Endowment Fund
Emmet County Lakeshore Endowment Fund
Emmet-Charlevoix Bar Foundation 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
Gloria Frank Anishinaabek Education 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 High School Band Boosters Fund
Harbor Springs Library Endowment Fund
Land and Water Education Fund
Little Traverse Choral Society Endowment Fund
Little Traverse Civic Theatre/Ross Stoakes Memorial Fund
Little Traverse Historical Society and Museum Fund
Little Traverse Sailors Endowment Fund
Manna Fund
Manna Project Endowment Fund
Steve and Molly Kircher Fund for Manna
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
Emer A. Mathias NCMC Foundation 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 Endowment Fund
Northern Community Mediation 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 Area Garden Club Endowment Fund
Petoskey Area Garden Club Fund
Petoskey District Library Fund
Petoskey Education Foundation Fund
Petoskey Lions Club Fund

Planned Parenthood Northern Michigan Fund
SAFE in Northern Michigan Fund
Scenic Michigan Endowment Fund
Ann Smith Charitable Fund
St. Francis Xavier Endowment Fund
Tip of the Mitt Watershed Council Water Quality Fund
Top of Michigan Trails Council Fund
Walloon Lake Trust and Conservancy Fund
Hugh D. Winnell Scholarship Fund in Memory of Vera Jean and Marjorie Winnell for Kiwanis
Hugh D. Winnell Scholarship Fund in Memory of Vera Jean and Marjorie Winnell for NCMC
Hugh D. Winnell Scholarship Fund in Memory of Vera Jean and Marjorie Winnell for PEF
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

Mary McClutchey Amacher Scholarship Fund
Angeldee Trade Scholarship
Baiardi Family Foundation Scholarship Fund
Scott Batchelor Scholarship Fund
Cafe 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
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
Alberto Moreno Memorial Scholarship Fund
Olofsson Family Scholarship Fund
Petoskey Area Business and Professional Women's (BPW) Scholarship Fund
Michael Gale Phillips Memorial Scholarship Fund
Barry Potter/HOPE Scholarship Fund
Ephraim Shay Scholarship Fund
Stafford and Janice Smith Scholarship Fund

BOLD indicates new funds



HARBOR SPRINGS FESTIVAL OF THE BOOK:

Books in Schools

On September 23, 2022, the Harbor Springs Festival of the Book distributed 2,390 books to school students and school libraries in six local districts with support from the Community Foundation Youth Advisory Committee. Along with their new books, students also enjoyed author visits at their schools helping them connect the stories and illustrations with the people who created them.

“In our district, many families cannot afford to prioritize books as something to purchase on a regular basis. Just yesterday, a student shared that there were literally no books at home, other than the ones we have given her. So, yes, the donations matter and make a difference.”

— Educator



OUR DONORS:

Long-Lasting Community Support

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Linda Adams
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Kathryn and Marty Breighner
Christopher and Karen Brieden
Dale and Kayla Briggs
Kenneth and Sarina Bronfin
Bill and Shannon Brower
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Brown Motors
Norma Brown
Allyson Brunette

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Charlevoix County Community Foundation,
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Ronald C. Baldwin Family Trust Fund
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Community Foundation for Southeast Michigan,
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Community Foundation of Greater Flint,
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Christine Corrie, Doug Nowels, and Families
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Loyd and Suzanne Crawford
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James and Mary Daniels
Thomas and Connie Dansbury
Robert Jensen Dau Foundation
Dave Kring Chevrolet-Cadillac
Joseph Davies
Ed and Cindy Davis
S. B. and Anne Davis
Amelie and Jason Dawson
Guy and Caryn Dearing
Decka Digital LLC
Bruce and Joanne Deckinga
Jack and Jenny Deegan
Julie Drost Dehn
Rosalie Demarest
Ed Dembek
Marguerite A. Demmer
Logan Demmy
Arthur and Linda Denton
Keith and Carole Deyer
Ron and Marion Dickel
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Hong Dinh
Scott Dito
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Robert B. and Sarah S. Dodge Foundation
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David and Connie Donovan
Ben and Liz Doornbos
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Randy Doyle
Joe and Donna Duff
Bruce Dunn
Marnie Duse
Stephen and Molly Dutton
Daniel and Sue Duval
Jim and Marty Easton
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Mike and Cheryl Eberhart
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Fidelity Charitable, David and Lloyd Crawford
Fidelity Charitable, Mr. and Mrs. Robert J. Eaton
Fidelity Charitable, Dutch Jones
Fidelity Charitable, Richard and Sally Knoll
Fidelity Charitable, Riehl Family Charitable Trust
Fidelity Charitable, Jeffrey and Frances Shepard
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David and Heidi Finley
Andrea B. Fisher
Elise Fisher
David K. FitzSimons
Michael and Margie FitzSimons
Dean and Cheryl Fleury
Thomas Flood
Martin and Madeline Flynn
Robert and Sandra Flynn
Matthew and Courtney Font
Gary H. Forbrig
Paul and Claire Forney
William and Mary Foster
Scott Franzen and Ellen Waite-Franzen
William P. Frazier
Robert Freeman
Windsor Freemyer
Andrew and Judith Frey
Brenda L. Frey
Mary Caroline Frey
Frey Foundation
Frey Foundation, Edward J. and Brenda Frey
Frey Foundation, Sarah Frey
Frey Foundation, William Frey
Bernd W. Friedrich
Friendship Centers of Emmet County
Rob and Patty Fuhrman
Larry and Paula Funk
Tom and Jaci Gallagher
Trish and Jack Garber
Hilton and Lisa Garner
Cheryl and Dave Garrett
Patrick and Joyce Garrett
Gregg and Debra Garver
Gary and Katie Gauthier
Sandra Gay

Rollin M. Gerstacker Foundation
Brian and Chris Gettel
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Gale Ghesquiere and Guy Gordon
Georgianna F. Gibbons
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Carol and Paul Godwin Jr.
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Lynne Goodwin
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Gorter Family Foundation
Gowan Custom Builders
Terry and Cindy Graessle
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Grain Train Natural Food Co-op, Inc
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Patti and Bally Grannis
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Great Lakes Wealth
Paul and Lynn Greve
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 VandenBrink Biddick Family Fund
 Brian and Dawn Wagner Charitable Fund



Dan & Linda CasaSanta

DAN & LINDA CASASANTA FAMILY FUND

Dan and Linda CasaSanta have long been connected to northern Michigan having come to Bay View for 30 years. “We moved around a bit in our work careers but Bay View was always a place we would return to, a place to call home,” Linda said.

As they approached retirement, Dan and Linda longed for the small-town feel. Reading the newspaper one evening in 2008, Linda found a listing for a house in Harbor Springs. Before long, they bought the house and, when they retired in 2013, became full-time northern Michigan residents.

“We moved here for the sense of community,” Linda shared. “We also put our philanthropy here for that same reason. We wanted to support locally grown solutions and projects that lift people up.”

In their travels for work, Dan and Linda saw first-hand global issues of poverty, food insecurity, lack of water, and other incredible needs. “Realizing these needs were so great on a global basis, we wanted to focus our giving here where we could see the benefit locally,” Dan explained. “We heard DJ Jones talk about the ‘triangle of trouble’ and we wanted to learn more about housing, transportation, and child care as they are essential parts of this community.”

Following their retirement, the CasaSantas established a donor advised fund here at the Community Foundation. Whether supporting local causes near to their hearts like Challenge Mountain, Little Traverse Conservancy, and North Central Michigan College, or on broader issues like housing, Dan and Linda are grateful for the role of the foundation in our community.

“That a difference can be made in a smaller area is one of the things that attracted us to the Community Foundation.”

— Dan & Linda CasaSanta

FILLED WITH GRATITUDE:

Thank You, Donors

We are grateful for your financial support. 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 the fiscal year ended on March 31, 2023.***

Memorials

In memory of Michael J. Austin

Larry and Paula Funk

In memory of Bill Blanchard

Mr. and Mrs. Thomas Zipp

In memory of William H. Boutell

Tim and Beth Boutell

In memory of Skip and Carol Cook

Gary J. Wolf

In memory of Kurt Damschroder

Valerie Wilson and Tracy Wintermeyer

In memory of Ted Frey

Betsy and Jim Barton
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Jeffrey and Barbara Austin

In memory of Spaulding GitzenJara

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In memory of Wes Hovey

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In memory of David H. Irish

Patrick and Ann Hylant

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In memory of Arline Lee

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In memory of Ernie Mainland

Frank and Dottie Hawthorne

In memory of Conrad Wayne "Papa" Nowels

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Jacqueline Leake
Doug and Tammie Nowels
Shelley Strickland

In memory of Gary Peltier

Marnie Duse

In memory of Sue Schulze

James and Patricia Clarke
Chuck and Susan Glass
Sue and Bill Klco

In memory of Dr. Glenn R. Seagren

Moon Seagren

In memory of Linda Sue Sheppard

Deanna Heath and Rob Kantner

In memory of Tom Smith

Kenneth and Sarina Bronfin
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Amy Piper Fund
Community Foundation of Greater Flint, William H.
Piper Fund
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Donald and Peggy Giffels
Gregory and Mary Jackson
Ric and Lisa Loyd
David and Nancy Smith
Valerie Wilson and Tracy Wintermeyer

In memory of Ted Swarthout

Anne Ryan Bishop
Kathryn and Marty Breighner
The Lowry Family
Patrick and Susan Schulte

In memory of Dr. William R. Todd

Margo A. Todd

In memory of Marty Van De Car

Teresa Arnett, Petoskey High School Class of 1982
Connie Barker, Petoskey High School Class of 1982
Julie Drost Dehn
Karen Hypio
Ellie VanderMolen
Terri Winegarden

In memory of Linda VanTreese

Peggy Swenor

In memory of James Wendland Sr.

Anonymous

In memory of Betty Jean Wise

Michael and Naomi Behrmann
Hong Dinh
The Ferraras
The Hrit Family
Chris and Sybil Hunter
Zonta Club of Petoskey Area

In memory of John Douglas Zoerhoff

Doug and Nancy Zoerhoff

B. THOMAS SMITH JR. (1934-2022)

Last year, the Community Foundation lost a valued member of our board of directors, Tom Smith. Tom, who had served on our board since 2011, was a kind, gentle, and outgoing man. His family recalls that his humble upbringing meant that Tom remained always alert and sensitive to the needs of others.

We are grateful for his service and commitment not only to our organization and community but also to those in need.



Honoraria

In honor of our valued clients

Bay North Realty

In honor of John and Sandy Baker

David and Joan Culver

In honor of Shaun Bezilla

Laura Kors

In honor of Joe Blachy

Roy and Linda Longworth

In honor of Ed Dodge

Robert B. and Sarah S. Dodge Foundation

In honor of Frank and Dottie Hawthorne's 40th anniversary

DJ and T Jones

In honor of David L. Jones

Patrick and Ann Hylant

In honor of Ric and Lisa Loyd Elizabeth Loyd Harvey

David L. Smith

In honor of Maureen Nicholson

Linda and Norm Harris

In honor of Kyle Nowels

Alan and Heidi Jesiel
Abbie Reed and Colin Riley

In honor of Declan O'Reilly

Erin Alexander
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In honor of Don and Deb Roth

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In honor of the Schwartz Family of Camelot - Maple Bay, Burt Lake

Kimberly A. Kihnke

In honor of B.J. Shawn, Becky Phillips-Kranig, and Bearcub Outfitters

Tom Adams

In honor of Phil and Rachel Thornton

Craig and Marny Kaufman

In honor of Sarah Wagner

Donna and Jack Carruthers

In honor of Christine Webster

DJ Jones

Tribute gifts listed here were received between April 1, 2022 and March 31, 2023.

LEGACIES LIVING ON:

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. Contact us if you're interested in learning more.

Anonymous (5)
 Dick and Annette Babcock
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 Agatha O. Boettger*
 Roma Walstrom Bolline*
 James H. Buller
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 Cathy Kalahar and David Evrard
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 Harry Kitchen
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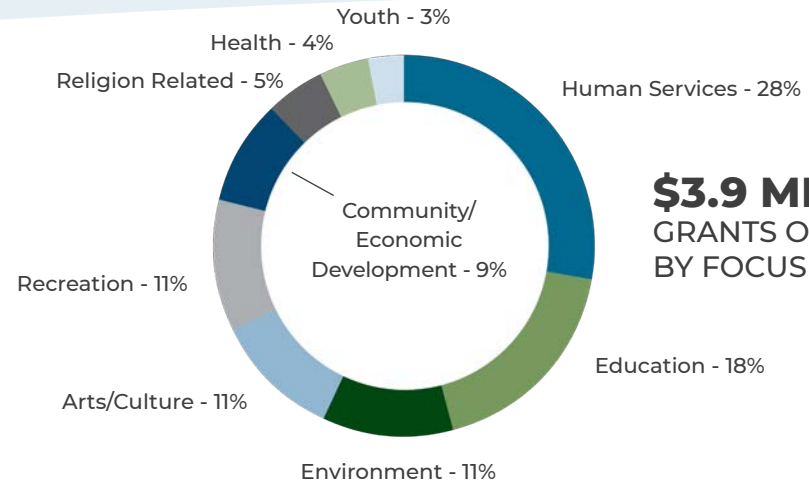
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**Those noted are no longer with us, but their legacy lives on.*

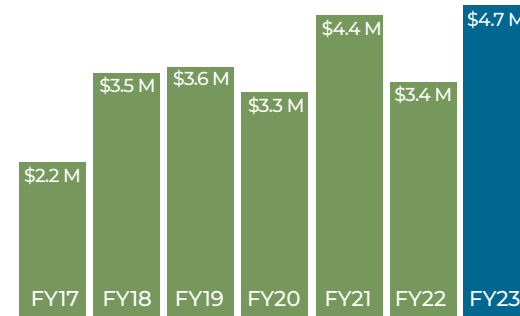


FISCAL YEAR 2023

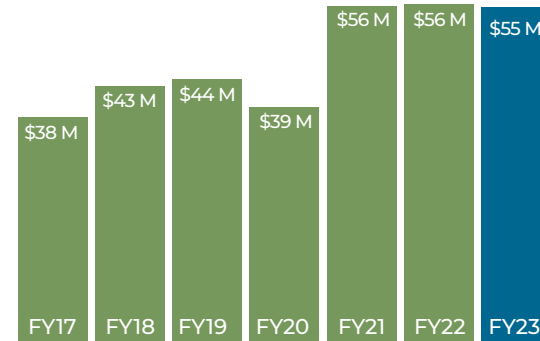
Annual Report Snapshot



\$3.9 MILLION
GRANTS OUT
BY FOCUS AREA



\$4.7 MILLION
IN GIFTS RECEIVED
1,074 TOTAL GIFTS



\$55.3 MILLION
NET ASSETS BY YEAR

All figures are for Fiscal Year 2023, ended March 31, 2023. Our audited financial statements and IRS Form 990 are available on our website, www.phsacf.org. You may also contact our office for copies.

Always Here to Serve Our Community.

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