



# COMMUNITY IMPACT

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GIVING & LIVING IN MIDLAND COUNTY



ANNUAL REPORT

# MESSAGE FROM THE PRESIDENT

## WHAT MAKES A BOLD COMMUNITY?

The word “bold” is defined as “showing the ability to take risks; confident, and courageous.” It was a bold step in 1973 when a group of men and women came together to form Midland Area Community Foundation. The results of their efforts: Over \$85 million invested in the Midland area through projects, grants, scholarships and a variety of initiatives. One needs only look through the history of the community foundation to see a variety of bold efforts. And truly, Midland Area Community Foundation is a reflection of this remarkable community in which bold men and women took risks and confidently and courageously moved forward on their dreams.

Thank you for joining with us today as we continue this journey. This year’s annual report tells the stories of transformational efforts in this community we all love. From helping first-generation students complete college to instilling the importance of family giving to providing a special experience at the Santa House, you’ll read about everyday people with a vision and a passion building something together: for good, forever.

Our philanthropist of the year, Jim Malek, is one of those everyday people who passionately believes in STEM education and has established six scholarship funds. In addition, Jim helps to light up the skies each summer at Riverdays through his involvement in designing the fireworks show.

Our annual report also highlights our investments in a wide range of projects, lists our Legacy Society donors, and provides our year-end financial report. What you read about in this annual report would not be possible without donors and volunteers like you. So whether you gave your time, talent or treasure (or all of these), we appreciate your contributions to impact this community in meaningful ways.

Harriet Tubman said, “Always remember, you have within you the strength, the patience, and the passion to reach for the stars to change the world.” We look forward to seeing the bold new ideas, projects and partnerships that will enable us to continue to change and transform our world here in the Midland area. Thank you for joining with us in this work.

Gratefully,

*Sharon Mortensen,*  
President & CEO

Midland Area Community Foundation



## Financials

Pages 3 - 6

MACF is a trusted steward of funds. Learn more about the financial stability of your foundation



## Big Ideas

Pages 7 - 14

We do more than just give grants. Collaborations and impactful projects are part of our DNA.



## Grants & Scholarships

Pages 15 - 18

\$3.5 million was awarded in 2015. Learn more about our grantmaking and scholarships.



## Leaving a Legacy

Pages 19 - 27

View our legacy society list and be inspired by our Philanthropist of the Year honoree.

# ASSETS = \$85,750,525

Assets are invested to benefit the Midland area

## COMMUNITY INVESTMENT FUNDS \$29,739,140

Meeting ever-changing needs, community investment funds address a broad range of projects and programs. MACF's primary grantmaking efforts are made through these funds.

## DESIGNATED FUNDS \$18,932,923

Designated funds are dedicated to specific organizations and causes throughout the community, allowing donors to support a senior center, museum or virtually any nonprofit organization.

## SCHOLARSHIP FUNDS \$13,449,567

Scholarship funds support local students as they seek higher education opportunities. MACF provides an online scholarship application and selection process each year.

## DONOR ADVISED FUNDS \$9,166,985

Donor advised funds are established and utilized by individual donors and their families. It's a simple, powerful and highly personal approach to giving.

## AGENCY FUNDS \$7,779,579

Agency funds are established by and support local nonprofit & governmental agencies. These endowed funds help create sustainability for local agencies.

## FIELD OF INTEREST FUNDS \$5,540,054

Field of interest funds are dedicated to helping specific causes or issues in the community. Donors establish the field of interest fund and the MACF Board of Trustees awards grants to local programs impacting this area.

## PROJECT FUNDS \$1,137,777

Project funds are an ideal vehicle to handle short term community projects, such as the recent Midland Fun Zone (Plymouth Park) renovations.

## GIVING CIRCLE FUNDS \$4,500

Giving circle funds allow groups to pool donations and vote on a specific nonprofit project to support.

For a full list of funds held at MACF and other financial data, visit: [www.midlandfdn.org](http://www.midlandfdn.org)

*"To give away money is an easy matter and in any man's power. But to decide to whom to give it and how large and when, and for what purpose and how, is neither in every man's power nor an easy matter." - Aristotle*

FOR GOOD.

FOR EVER.

# FINANCIAL STATEMENTS

## STATEMENT OF FINANCIAL POSITION

ASSETS	2015	2014
Cash & cash equivalents	\$3,891,264	\$2,340,305
Investments	80,533,550	83,812,096
Prepaid expenses & other assets	38,448	27,523
Parks & improvements	668,647	668,647
Office facility & equipment	618,616	647,326
<b>Total Assets</b>	<b><u>\$85,750,525</u></b>	<b><u>\$87,495,897</u></b>
<b>LIABILITIES &amp; NET ASSETS</b>		
<b>Liabilities</b>		
Accounts payable	\$37,958	\$38,554
Grants payable	130,930	160,150
Restricted funds	1,864,014	1,887,711
<b>Total Liabilities</b>	<b>2,032,902</b>	<b>2,086,415</b>
<b>Net Assets</b>		
Unrestricted	81,629,275	83,162,305
Temporarily restricted	1,088,348	1,247,177
Permanently restricted	1,000,000	1,000,000
<b>Total Net Assets</b>	<b><u>83,717,623</u></b>	<b><u>85,409,482</u></b>
<b>Total Liabilities and Net Assets</b>	<b><u>\$85,750,525</u></b>	<b><u>\$87,495,897</u></b>

## STATEMENT OF ACTIVITIES

REVENUE & GAINS/(LOSSES) & OTHER SUPPORT	2015	2014
Contributions	\$5,370,075	\$5,529,155
Investment income	(2,086,079)	2,645,444
Miscellaneous	71,698	81,487
Total revenues and gains/(losses) & other support	3,355,694	8,256,086
<b>EXPENSES</b>		
Grant awards	3,566,209	3,775,730
Other program expenses	823,902	1,984,520
Management/general	474,279	472,194
Fundraising	183,163	165,532
<b>Total expenses</b>	<b><u>5,047,553</u></b>	<b><u>6,397,976</u></b>
Change in net assets	(1,691,859)	1,858,110
Net assets, year beginning	85,409,482	83,551,372
<b>Net assets, year end</b>	<b><u>\$83,717,623</u></b>	<b><u>\$85,409,482</u></b>

Audited financials have been provided by Andrews, Hooper Pavlik PLC. If you would like a copy, contact MACF at 989.839.9661 or visit our website at [www.midlandfdn.org](http://www.midlandfdn.org).



## DESIGNATED FUNDS IN ACTION

Two funds were established at MACF to support the ongoing needs of Midland's Santa House: The Gilbert & Eleanor Currie Christmas Lighting/Santa House Endowment Fund and The Thomas F. & Holly A. Valent Endowment Fund.

Donor support makes projects like the Santa House possible. Do you have a project you're passionate about? Contact MACF to learn more about designated funds.

## SANTA IS IN THE HOUSE

Santa makes Midland home throughout the month of December. For a full schedule and other news, check out the big guy online at: [facebook.com/SantaHouseMidland](https://facebook.com/SantaHouseMidland)

# CRAZY ABOUT SANTA

If there's one thing Midland is known for, it's our love of all things Christmas. As home to perhaps the most well-known Santa Claus school (and house) in the world, we take the holiday seriously. During the 2015 season, over 30,000 guests visited Santa for free, thanks to the generosity of MACF donors.

The Santa House has been a project of the community foundation since the permanent structure was built in 1987. Families come each year to chat with the jolly fellow, receive a free gift and take in the sights and sounds.

Midlanders Tom & Holly Valent take their dedication to the spirit of Christmas to another level. Tom is Dean of the Charles W. Howard Santa Claus School. As a civil engineer at Gerace Construction Company in Midland, he helped build the Santa House in 1987. Now CEO of Gerace, he led the renovation efforts in 2012 and continues to improve on the house each year. On top of that, Tom and Holly portray Mr. and Mrs. Claus every season, to the delight of visitors from all over.

"Santa Claus is the most well-known character in the world," Valent says. "The visit that you have with a child - they're going to remember it for the rest of their life, so it's important that you do a good job."

The Santa House season kicks off in Midland on Tuesday, November 29, 2016 with the annual Courthouse Lighting Ceremony. Learn more at: [www.midlandfdn.org](http://www.midlandfdn.org)



# 60% BY 2025

Of the current crop of college-bound students in Midland County, a full 58% of them will not complete their degree program.

The Midland County Career & College Access Network (CCAN) was established by the community foundation in 2013. By 2025, our goal is for at least 60% of Midland County residents to have a postsecondary credential or degree.

We've partnered with local educational institutions to plan and implement several programs to assist students, including FAFSA completion and financial aid seminars, college mentors who help guide students through their pivotal first year of college, and career exploration days, where students get a glimpse of life after college.

"The data shows that if you're a first generation college student or come from a low income family, you're more likely to struggle finishing your degree," says Valerie Gerhart, CCAN Coordinator. "We're putting a lot of focus on these students in particular."

The CCAN College Mentor Program matches upperclassmen with first generation freshman, offering guidance, tips, and often just a friendly connection on campus that can be critical in helping students get through their first year.

"I got involved with the mentor program because I knew what it was like to be a first generation student and really be overwhelmed by it all," says Jeremiah Morin, a mentor and student at Delta College.

The program appears to be working, at least for Jeremiah's mentee, Skyler James.

"It made every difference," James says. "I probably wouldn't still be going to Delta if I didn't have somebody to help me."

CCAN also works to ensure students are aware of options outside of traditional college courses. Trade certifications and other STEM programs can lead to rewarding careers with competitive compensation.

"Our primary goal of a 60% completion rate may seem lofty," says Gerhart. "But we believe it's attainable. It's a matter of connecting students with the right tools, people and programs."



**CCAN** MIDLAND COUNTY  
career + college access network



# MAKING HIGHER ED HAPPEN

Most of her life, Andrea Parkinson never considered going to college. Born to a mother addicted to cocaine, she spent time in the foster system before eventually being adopted by her mother's ex-husband. She was influenced to enroll at Northwood University thanks to the urging of her mentor.

"I was a troubled teen," says Parkinson. "I wasn't sure where I wanted to go - I didn't even think college was an option for me at first."

Andrea graduated from Bullock Creek High School and managed to come up with funding on her own for her first year at Northwood University. After succeeding academically but coming up short on funds, she worried she would have to call it quits after that first year. Proving the value of positive role models, she again reached out to her mentor, who informed Andrea of scholarship opportunities through the community foundation. As it turned out, a scholarship specifically for students who had been through the foster care system had been established at the community foundation.

"It was unbelievable," she says. "Just to open a letter and see that something so impossible could become possible."

The Buell Family Scholarship fund was established with the goal of fully funding the education of a deserving Midland or Gladwin County student who came out of the foster care system.

Andrea has high hopes for her future. "My dream job is to be a general manager at a high end resort. I know that seems impossible now, but so did college."

**FAMILY**  
BE GRATEFUL FOR ALL THAT YOU HAVE.  
TAKE CARE OF EACH OTHER.  
KEEP YOUR PROMISES.  
SPEND QUALITY TIME TOGETHER.  
PLAY GAMES, TELL JOKES.  
ALWAYS TELL THE TRUTH, EVEN WHEN IT'S HARD.  
HAVE FAMILY DINNERS.  
BE GENEROUS AND KIND WITH YOUR WORDS.  
REMEMBER BIRTHDAYS AND ANNIVERSARIES.  
BE POLITE AND RESPECTFUL.  
INSPIRE EACH OTHER TO REACH YOUR POTENTIAL.  
MUCH BETTER. DREAM BIG.

*"My parents could have easily used that money to take us on an awesome vacation or buy some cool technology, but at the end of the day, is it the things you buy or the people you impact?"*

- Luke White

# FAMILY GIVING

## THE WHITE FAMILY DONOR ADVISED FUND



Paul and Kim White are no strangers to giving back. Their list of community involvement is impressive, but perhaps more impressive is their work instilling that same sense of giving in their four boys: Luke, Adam, John and Eric.

"We meet several times throughout the year to discuss what to do with our endowment fund, because as community needs change we try our best to adapt to them," says Luke, the oldest of the four and a freshman at Calvin College.

The Whites established their fund in 2003. As the fund grew through additional

donations and investment income, they were able to give back to causes that mattered to them.

Their kitchen table conversations have led to grants from the fund to a variety of causes in their community and beyond.

"Having an endowment fund has had a significant impact on who I am," says John, the White's third son and a freshman at Midland High School. "I can intelligently talk about Midland's Open Door homeless shelter. I can tell you about The Arc of Midland and the impact they have in our community. Not enough of my peers are

aware of community needs - maybe not enough adults either."

When looking into opening a fund, Paul White was surprised to learn it could be established by raising \$5,000 over a period of five years.

"I worry that many in our community believe you have to be a gazillionaire to be a philanthropist," says White. "You don't. Establishing a fund is a reachable goal for many."





**GRANTS = \$3,566,209**

Your community foundation holds over 500 individual funds, each with a different purpose, each impacting our community through grants and scholarships.

Most funds were established by individuals

like you who are interested in partnering with the foundation to impact their community.

The numbers on this page represent grants and scholarships from all funds held at MACF. On the next page, you

can view grants that were given from the Community Investment Fund, which provides dollars for foundation-directed grantmaking.

To learn more, visit [www.midlandfdn.org](http://www.midlandfdn.org).

# COMMUNITY INVESTMENT GRANTS

## YOUTH ACTION COUNCIL GRANTS

- Adoption Option - \$10,000**  
LEAP (Learn, Evaluate, Achieve, Play) mentor program
- Bullock Creek Schools - \$5,000**  
Creation of "Lancer Lounge" area
- Dow High School Charger Chefs - \$2,400**  
Expansion of Charger Chefs student cooking program
- Midland County - \$10,000**  
Canine advocate program for Prosecuting Attorney's office
- Midland Public Schools - \$3,000**  
Equipment for Table Tennis Club
- MidMichigan Multisport Racing - \$2,991**  
M3Kids Next Gen Triathlon Camp

**The Arc of Midland - \$10,000**  
Bike Camp for developmentally disabled children

**Bay/Midland Chapter: Pheasants Forever - \$15,000**  
New equipment purchases (tractor/trailor/drill)

**Chippewa Nature Center - \$7,500**  
Two 8-passenger golf carts

**Chippewa Watershed Conservancy - \$1,600**  
Map of canoe/kayak launch sites along Pine River from Alma to the Chippewa Nature Center

**Creative 360 - \$10,000**  
Outdoor, accessible "Wellness Pathway"

**The Dahlia Hill Society of Midland - \$5,601**  
Wayfinding signage

**Greater Midland Community Centers - \$40,000**  
Wellness Concierge initiative

**The Greater Michigan Construction Academy - \$40,000**  
Technology lab improvements

**Junior Achievement - \$10,000**  
Junior Achievement programs in Coleman Elementary School

**Lincoln Township - \$6,575**  
Bring Vietnam Moving Wall to the community of Sanford from July 13-18, 2016

**Little Forks Conservancy - \$12,800**  
Home & business conservation programs

**Midland Area Homes - \$8,000**  
Relocation cost-benefit study

**Midland Area Transportation Study - \$11,600**  
Assess transportation needs in Midland County

**Midland Charter Township - \$40,000**  
Paved trail from Whiting Overlook Park to Bullock Creek Elementary School

**Midland Community Cancer Services - \$40,000**  
Program expansion

**Midland County Council on Aging - \$14,000**  
Add air lock enclosure to building entrance

**Midland County Fairgrounds - \$20,000**  
Restoration of the Leiphart School House (pictured)

**Midland County Habitat for Humanity - \$25,000**  
Home repairs for low income families

**Midland Fire Department - \$15,000**  
New equipment purchase (trailer)

**Midland Public Schools - \$27,000**  
The International Baccalaureate Career-related Program (IBCP)

**Perceptions - \$10,000**  
Creation of inclusive and diverse choir benefiting Great Lakes Bay Region

**Pinecrest Farms - \$18,722**  
Safety initiative for long-term care residents

**The ROCK Center for Youth Development - \$40,000**  
ROCK Exposure program expansion

**Sanford Youth League - \$25,000**  
ADA accessibility project at Sanford Park baseball fields

**Smart Growth America - \$5,833**  
Address emerging urban trends in real estate development and business attraction

**Ten16 Recovery Network - \$18,106**  
Center for Recovery and Wellness (CRew) project expansion

**West Midland Family Center - \$10,000**  
Partial renovation of WMFC Childcare Center

# COMMUNITY FOUNDATION LEGACY SOCIETY

Gene Anderson  
Mary E. Armstrong\*  
Charles R. Ashcraft\*  
Carolyn Ayre\*  
Richard Ayre\*  
Gwendolyn M. Bagley\*  
George R. and Dorothy J. Baker\*  
Orrin H. and Eleanor L. Barrett\*  
Barbara\* and Wayne E. Barrett  
Karl W. and Sandra R. Bauman  
Rebecca S. Bastuk  
Harry J. Beamish\*  
Imogene Beattie\*  
Marian Bebb\*  
Linda and Neil Bell  
Sharon Brady  
Stuart S. and Katherine Branson\*  
David and Colleen Bremer  
Veronica Cermak\*  
Fern Christenson\*  
Daniel J. and Linda Cline  
Donna Comfort  
Helen M. and Floyd Copus  
Ronald F. Cornier  
Eleanor Currie\*  
Ruth E. Dangler\*  
Nicholas and Janet Darby  
Matt and Kathleen Davis  
Greg and Robyn Dorrien  
Marion Dudd\*  
Catherine Elliott\*  
Donald and Marilyn J. Findlay  
Elloweese Denise Freer  
Kathleen\* and Howard Garrett  
Catherine Gerace\*  
William and Karen Gibson  
W. Herman Gieseler\*  
Mark and Alison Goethe  
Roger\* and Virginia Gohrband  
James and Priscilla Gorman\*  
L. Scott Govitz  
Julius Grosberg\*  
Reigh and June Gunderson  
Donal D. and Sally E. Hammond

Dr. Kuno\* and Lois Hammerberg  
Sue Haske Lane  
Francine Heinze\*  
Robert L. and Cheryl K. Johnson  
Sharon Kalina  
KennyLou Wold Keskey\*  
Charles Kline\*  
Dennis K. and Jacqueline Klipa  
Jeff Kroeger  
Douglas E. Lake\*  
Linda and Lester Lamparski  
Harold Lange  
James R. Malek  
Lawrence and Eleanor Matthews\*  
Michael and Linda McComb  
Marty and Jan McGuire  
Bernie Meister  
Ann H. Moore  
Sylvia Myers  
Mary Eileen O'Brien\*  
Howard Ode\*  
Barbara B. Panian\*  
Ruth Peele\*  
Faye E. Prescott\*  
John S. Reder\*  
Robert B. and Jean W. Reinhart\*  
Ruth M. Rice\*  
Joseph E.\* and Joan H. Rogers  
Hugo L. Schaefer, Jr.\*  
Sharon L. Sims-Koffman  
Mary E. Smith  
Denise K. Spencer  
Sandra Steele  
Betty L. Summerville  
Joann C and Glen Taylor  
Terrance and Deborah Temperly  
Mary R. Thomas\*  
Frederic C. Tuttle\*  
Dorothy Van Arsdale\*  
Mary M. Wilson  
Lois M. Yack\*  
David and Terri Zimmerman  
George and Gladys Zubulake

\* = deceased

## IMPACT FOR GOOD, FOR EVER

Giving can far exceed our lifetimes. Members of the MACF Legacy Society have chosen to include the community foundation in their estate plans, helping to ensure the long-term success of our community. To learn more about how you can make an impact, contact us at 989.839.9661.

# JIM MALEK

## PHILANTHROPIST OF THE YEAR



At the end of each year's Riverdays Festival in Midland, when the last firework has exploded in the night sky, Jim Malek makes his way from the control trailer to the Midland Area Community Foundation tent with the same question: "What did you think of the show?"

A retired Dow Corning chemist, Malek has been passionate about fireworks since middle school. For over a dozen years, he's embraced that passion and volunteered with a local fireworks company to bring one-of-a-kind pyrotechnic shows to Chippewassee Park each year during the community foundation's Riverdays Festival

In addition to serving on the Riverdays committee, Malek volunteers his time to several agencies, including Midland Center for the Arts, MCTV, and the Chippewa Nature Center.

"Jim is what I would call a quiet philanthropist," says Sharon Mortensen, MACF President & CEO. "When we think about our Philanthropist of the Year, many times we think about those big names who have had an incredible impact, but Jim has very quietly had an incredible impact."

Through the community foundation, Malek has established six separate scholarship funds. Five of the funds award a scholarship to a local student seeking a STEM (Science, Technology, Engineering, Math) degree, while the sixth supports a students pursuing a degree in education. Together, these funds offer thousands of dollars each year.

When the Riverdays fireworks display ends and Jim asks his question, he knows as well as anyone in attendance that it was an amazing show. It's important to him to hear what others think and see how they were impacted by his efforts.

For these reasons and many more, Jim Malek is the Midland Area Community Foundation's 2015 Philanthropist of the Year.

*Photo: Jim and daughter Melinda Malek*

# STAFF

**Sharon Mortensen**  
*President & CEO*



**Dave Kell**  
*Director of Finance*



**Melissa Kesterson**  
*Program Officer*



**Emily Schafer**  
*Development Officer*



**Heather Crowl**  
*Accounting Clerk/Scholarship Coordinator*



**Laura Dittenber**  
*Administrative Assistant*



**Ben Tierney**  
*Communications Officer*



**Nicole Wilson**  
*Youth Action Council Coordinator*



**Valerie Gerhart**  
*Career & College Access Network Coordinator*



# BOARD OF TRUSTEES

**Elizabeth Lumbert**  
*Board Chair*

**Kay Wagner**  
*Vice Chair*

**Kevin Gay**  
*Treasurer*

**Duncan Stuart**  
*Secretary*

**Rod Coleman**

**Mary Gorte**

**Angela Hine**

**Liz Kapla**

**Kevin Kendrick**

**Dave Marsh**

**Carol Miller**

**Jim Nigro**

**Michael Rogers**

**Beth Swift**

**Kim White**

## OUR MISSION

To provide philanthropic leadership to strengthen our community by fostering collaboration and giving today and in the future.

## OUR VISION

To be the catalyst and recognized leader for community philanthropy.

The essence of a community foundation is many people putting their money together to address the diverse needs where they live. Gifts enable people to dream bigger, to see the many possibilities. As money is endowed, the gifts grow forever, providing ongoing support to help the community prosper.

Community foundations reflect and support donors' wide array of interests and help them address all aspects of community need including arts and culture, economic development, education, environment, health, human services and recreation.

**JULY 15, 2016**

Grant proposals due

**JULY 15 & 16, 2016**

Riverdays Festival

**OCTOBER 12, 2016**

Ripple Effect

**OCTOBER 15, 2016**

Grant proposals due

**NOVEMBER 29, 2016**

Annual Courthouse Lighting

**DECEMBER 4, 2016**

Senior Christmas Dinners



## MACF PROJECTS & PROGRAMS

- Access to Recreation
- Career + College Access Network
- Cultural Awareness Committee
- Entranceways Committee
- Give Local Midland
- Grants
- Ripple Effect
- Riverdays
- Santa House/Courthouse Lighting
- Scholarships
- Senior Christmas Dinners
- Violence Prevention Partnership
- Whiting Overlook Park
- Youth Action Council



# MACF ANNUAL REPORT

For good. For ever.

[WWW.MIDLANDFOUNDATION.ORG](http://WWW.MIDLANDFOUNDATION.ORG)  
[INFO@MIDLANDFOUNDATION.ORG](mailto:INFO@MIDLANDFOUNDATION.ORG)

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