

ROTARY OF TRAVERSE CITY

2016-2017 Annual Report



Dear Rotarians and Friends,

Since inception, Rotary Charities has had a consistent mission of helping to create a thriving region. In the past, our primary focus was on grants to nonprofit organizations. Over the years we have learned that it takes more than money to help solve complex community problems, and that nonprofit organizations acting alone cannot create a fair, prosperous place for everyone.

Through our recent work, we helped the people and places we serve to thrive by investing more than just grant dollars in custom community solutions. We have leveraged the Rotary network to bring new resources to our region, and we have integrated our talented NorthSky consultants in meaningful work from Ellsworth to Frankfort.

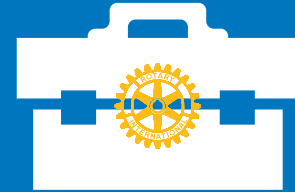
As you know, when help is needed, we Rotarians have a full tool box of resources to deploy for the betterment of the communities we serve. In this report, we are proud to highlight organizations who have used a combination of our tools to achieve success in delivering their mission in each of the five counties in our footprint; Antrim, Benzie, Grand Traverse, Kalkaska and Leelanau.

We wish there was more room in this report to showcase the daily good work taking place in the region we call home. In the near future, we will be enhancing efforts to be better storytellers. Stay tuned! We look forward to our continued good work, together.

Marsha Smith
Executive Director



Elaine Wood
Board Chair



**ROTARY
TOOLBOX**

GRANTS

**CAPACITY BUILDING
RESOURCES**

CONNECTIONS

**LEARNING
OPPORTUNITIES**

**NORTHSKY CONSULTING
SERVICES**

LEADERSHIP COACHING

IMPACT INVESTING



NORTHSKY
By the Numbers

64

Consulting:
64 organizations and 5 networks served.

284

Professional Development:
Over 284 people from 105 organizations attended one of NorthSky's 20 professional development events.

21

Coaching:
21 regional leaders received leadership coaching.

NORTHSKY IMPACT

"I would have given anything for a NorthSky in my previous life as a nonprofit leader. I longed for a place that not only provided resources and opportunities for learning, but people who truly cared about me being the best I could be. That's NorthSky. It's rare to find that unique combination of expertise, tools, community connections and deep desire to help that NorthSky offers. To me, NorthSky is like the engine that creates the change Rotary sees possible. As a coach, my job is to stimulate ripples or sparks of change and provide the support system to reaching success. But I can't do it on my own – I value a team of skilled consultants to work with that NorthSky allows me to tap into. It's a huge benefit not only for me but for the clients we serve. In the end, I'm the lucky one. I get to work with amazing people because of Rotary Charities and NorthSky's commitment to making a difference in this community."

— *Lucille Chrisman CPCA, ACC, Certified Executive Coach and NorthSky Consultant*

"After years of working in the nonprofit sector and personally experiencing the capacity-building activities of Rotary Charities and NorthSky, I am honored to join the incredibly talented pool of NorthSky consultants. I can't think of anything more rewarding than continuing to learn and grow with this team, while working to support the good work of our nonprofit community."

— *Colleen Masterson-Bzdok, NorthSky Consultant*

ANTRIM COUNTY GRANTS APPROVED DURING FISCAL YEAR 2016/2017

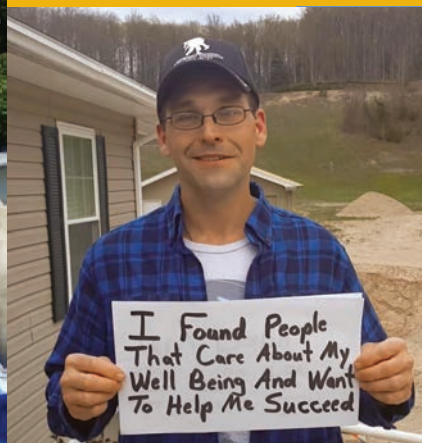
| | | |
|--------------------------------|----------|--|
| Village of Ellsworth | \$3,200 | community needs assessment |
| Good Samaritan Family Services | \$36,500 | space and programs for men to learn how to connect with their children |
| Grass River Natural Area | \$12,851 | continuing support to build a stronger donor and volunteer base |
| Crosshatch | \$35,000 | continuing support to better manage data, funds and volunteers |
| Communities in Schools | \$33,460 | expand national model program for high school completion and college attendance to other underserved communities |

BENZIE COUNTY GRANTS APPROVED DURING FISCAL YEAR 2016/2017

| | | |
|---------------------------------------|----------|--|
| Alliance for Economic Success | \$5,000 | Benzie County manufacturing strategy |
| Benzie Area Christian Neighbors | \$20,000 | technology upgrades to help more people |
| Benzie County Government | \$15,000 | economic development strategy |
| Benzie Home Health Care | \$19,290 | merger of Benzie Home Healthcare and Benzie Commission on Aging |
| Grow Benzie | \$40,950 | universal access bus shelter and edible trail |
| Benzie Leelanau Health Department | \$6,239 | Live Well Benzie and Diabetes Prevention Program |
| Betsie Valley Community Center | \$10,000 | feasibility study around Thompsonville Community Center |
| Munson Healthcare Regional Foundation | \$36,015 | Food Rx program |
| Honor Area Restoration Project | \$7,500 | campaign plans to acquire and protect key Platte River frontage |
| Joyfield Township Lakes to Land | \$19,000 | strategy for housing, corridor improvements and universal access |


GRANT AWARD FEATURE
Good Samaritan

Rotary supported the expansion of HIS House – a Good Samaritan program for Antrim County dads. By helping men take responsibility for themselves, their children and the mothers of their children, His House reduces social difficulties that come to families without fathers, such as poverty and children growing up without a solid, father role model. Last year, His House had contact with 48 dads.


GRANT AWARD FEATURE
Grow Benzie

“Rotary Charities understands the importance of connecting the different systems that reflect our mission, and have helped us link our shared values between food, education, youth and community. Grow Benzie has experienced exponential growth and public awareness as a result of our relationship with Rotary Charities. Our new edible trails and mini-golf, with expanded parking and accessibility, has attracted record attendance to our farmers market and other community workshop events, while boosted venue rentals have contributed to creating consistent operating income.”

— Josh Stoltz, *Grow Benzie Executive Director*



GRAND TRAVERSE COUNTY GRANTS APPROVED DURING FISCAL YEAR 2016/2017

| | | |
|---|----------|--|
| Big Brothers Big Sisters | \$34,410 | mentoring pilot program at Central Grade School |
| Community Services | \$15,000 | home healthcare service training |
| Crooked Tree Arts Center | \$15,000 | merger of regional arts and culture organizations |
| El Grupo Norte | \$8,000 | strategic plan to promote increased youth fitness |
| For Love of Water (FLOW) | \$35,000 | continued support to build organizational sustainability |
| Grand Traverse Foodshed Alliance | \$10,000 | culinary medicine and teaching kitchen programs |
| Groundworks Center for Resilient Communities | \$30,000 | Ann Arbor to TC rail project |
| Habitat for Humanity | \$25,000 | continuing support for organizational sustainability |
| Health Department | \$35,000 | increase oral health services in rural areas |
| Human Nature School | \$5,000 | tech support, database build out |
| Justice for Our Neighbors | \$10,000 | build organizational sustainability |
| Legal Services | \$7,380 | pro bono legal services for low income people |
| Little Collaborative | \$50,000 | shared staffing of Helplink, Agape Financial and Family Partnership |
| Maritime Heritage Alliance | \$4,500 | organizational development plan |
| Michigan Environmental Council | \$5,000 | clean energy plan for Traverse City |
| Networks Northwest — Health Coalition | \$35,000 | healthcare regional network building |
| Networks Northwest — Michigan Arts & Culture | \$10,000 | host summit and focus groups to support arts and culture in the region |
| Northern Family Intervention Services | \$29,981 | technology support and case statement for supporting youth in crisis |

| | | |
|--|----------|---|
| Northwest Michigan Community Action Agency Homeless Youth Coalition | \$20,000 | data collection, strategy and systems awareness |
| Northwest Michigan Support Housing | \$10,000 | Improved process through LEAN management |
| Parallel 45 | \$25,000 | performing theater arts program |
| Peace Ranch Paraklesis Program | \$19,375 | expand equine therapy program |
| Preserve Hickory | \$7,500 | collaborative plan for shared trail use |
| Safe Harbor | \$50,000 | emergency shelter |
| Stoneshouse | \$25,000 | program to help house people with substance abuse issues |
| TC Retreat | \$8,000 | build organizational structure, bylaws and governance plan |
| Traverse Area Recreation Trails (TART) | \$5,000 | maintenance sustainability plan for Boardman Lake Trail |
| Venture North | \$10,000 | technical assistance to become a Community Development Foundation Institution and help small businesses' development and growth |
| Women's Resource Center | \$5,000 | Doula program relocation |
| Young Peacebuilders Program | \$35,000 | create Peacebuilder Clubs |

GRANT AWARD FEATURE
For Love Of Water (FLOW)

"Rotary's grant has been instrumental in propelling our work and mission forward, here at FLOW. Our goal is to make sure that we get it right here in the Great Lakes with sound science, protective laws and empowered citizens.

With the resources to grow our team and focus on fund development, FLOW has been able to expand our program work to communicate and empower citizens and communities on ways they can defend our lakes.

The Rotary grant has opened the door for many new partnerships and, this year, we more than tripled the number of grant proposals we submitted and were awarded funding from new partners such as the Clif Bar Family Foundation and the Center for Health and Environmental Justice.

Securing funding to increase organizational capacity is very challenging but so important for newer organizations on the cusp of growth. We are incredibly grateful to Rotary for recognizing this need and supporting our work."

— Liz Kirkwood, Executive Director, FLOW



Liz Kirkwood, Executive Director, FLOW with Deirdre Ring-Marrinson, Fund Development and Grants Specialist



KALKASKA & LEELANAU COUNTY GRANTS APPROVED DURING FISCAL YEAR 2016/2017

| | | |
|-------------------------------------|----------|---|
| Kalkaska DDA and Parks & Recreation | \$18,000 | county recreation plan and design Railroad Square |
| Inland Seas Education Association | \$23,720 | Schoolship program development and sustainability support |
| Glen Lake Association | \$5,000 | Glen Lake and Crystal River watershed protection plan using shared ordinances |

GRANT AWARD FEATURES

Kalkaska DDA and Parks and Recreation

“It was a pleasure with such a dedicated group of local residents. When we started the process, there were seventeen #1 priorities and when finished it was narrowed to six key focus areas. Since the conclusion of the strategic plan, community leaders and concerned citizens are working collaboratively on four of the six focus areas and making considerable progress toward their implementation. The community-based strategic process funded by Rotary Charities creates a network of lasting relationships based on common vision, trust and the power of collaboration.”

— John Iacoangeli, NorthSky Nonprofit Network Consultant

With recent support from Rotary, the greater Kalkaska community will have completed plans for economic development, their DDA, the redevelopment of Railroad Square and public library as well as a cooperative usage policy for all county recreation facilities.



Inland Seas Education Association

Rotary helped ISEA to increase impact through supporting new schoolship programs: Microplastics, Seamanship and Diving Deeper. Last year, ISEA also offered two-hour public sails with themes including: Great Lakes Under the Microscope, Fishes of Lake Michigan, Steady the Ship! and What’s in the Great Lakes Food Web?

“Thanks so much for all you do for the education of our youth. What a great program and a great way for kids to actually DO science rather than listen to science. It is also nice to see how exact and precise you are in gathering data. In the school environment, kids know their data is not really important – on the ship they KNOW it is important!”

— 2016 Participating Teacher



“Camps & Services has always been the benevolent landlord of properties where other organizations ran great programs that benefited our community. It is very exciting to now be working with our board and other committed volunteers to develop our own programs for the Greilick Outdoor Recreation & Education Center and the Discovery Center & Pier.”

— Sharron Zimmerman
President, Rotary Camps and Services

BOARD

- Sharron Zimmerman, Chair
- Bob Stow, Vice Chair
- Al Olson, Treasurer
- Chris DeGood
- Phil Ellis
- Monica Larsen
- Doug Meteyer
- Mark Newhouse
- Dan Rickard
- Phil Rosi

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Program Director
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Nick Killian
Greilick Director
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GREILICK OUTDOOR EDUCATION CAMP & RECREATION CENTER

In 1923, a group of Rotarians, under the leadership of Clarence Greilick, raised \$1,100 to buy 450 acres of land near Spider and Rennie Lakes. The land was established as a community campground for 4-H, Boy Scouts and Girl Scouts. In 1956, Rotary purchased an additional 400 acres on Bass Lake for the Girl Scouts. Since then, Camp Greilick was managed by the Boy Scouts. At the end of 2016, the Boy Scouts made a strategic decision to cease their management of Camp Greilick, creating a challenge and an exciting opportunity for Rotary. This year, we began developing a new operations model for Greilick; one designed to create outdoor recreation and educational opportunities for more people, different groups, visitors of all ages, and return back to the vision of 1923.



DISCOVERY CENTER AND PIER

Fall 2016—the schooner *Utopia* arrived after being donated to ISEA by Peterson Boat Works in Sturgeon Bay, Wisconsin. The addition of *Utopia* to *Madeline*, *Manitou* and *Champion*, now firmly gives Discovery Pier the acclaim of being home to the largest tall ship fleet on the American side of the Great Lakes. With lead funding from the Michigan Council for the Humanities, other donations and a lot of sweat equity from the Discovery Center partners, Ship Shapes—a new free outdoor exhibit—was completed in the Discovery Center courtyard. It juxtaposes a replica of a Mackinaw boat with a modern sloop. Ship Shapes also provides interesting interpretive material tracing the history of boats on the Great Lakes from the Anishinaabek Wiigwaasi-Jiimaan (birch bark canoe) to the modern Coast Guard cutter. There is something there for visitors of all ages.



FINANCIAL REPORTS



ROTARY CHARITIES

| | 2017 | 2016 |
|--|-------------------|-------------------|
| NET ASSETS, BEGINNING OF YEAR | 43,410,771 | 46,827,536 |
| REVENUE AND GAINS | | |
| Dividends and interest | 995,603 | 920,181 |
| NorthSky- consulting fees | 276,067 | 317,326 |
| Oil and gas royalty income | 136,803 | 92,124 |
| Net realized and unrealized gain (loss) | 4,292,988 | (1,415,550) |
| Grants and other | 57,723 | 82,208 |
| Total Revenue and Gains | 5,759,184 | (3,711) |
| OPERATING EXPENSES AND GRANTS | | |
| Program services | | |
| Grants | 1,425,715 | 2,544,389 |
| NorthSky | 499,912 | 439,315 |
| Management and general | 353,817 | 429,350 |
| Total Operating Expenses and Grants | 2,279,444 | 3,413,054 |
| Change in unrestricted net assets | 3,475,103 | (3,419,243) |
| Change in temporarily restricted net assets | 4,637 | 2,478 |
| Total change in net assets | 3,479,740 | (3,416,765) |
| Unrestricted net assets end of year | 46,865,793 | 43,390,690 |
| Temporarily restricted net assets end of year | 24,718 | 20,081 |
| TOTAL NET ASSETS END OF YEAR | 46,890,511 | 43,410,771 |



ROTARY CAMPS & SERVICES

| | 2017 | 2016 |
|--|------------------|------------------|
| NET ASSETS, BEGINNING OF YEAR | 3,913,895 | 3,052,079 |
| REVENUE AND GAINS | | |
| Dividends and interest | 23,356 | 34,507 |
| Oil and gas royalty income | 485 | 185 |
| Net realized and unrealized gain (Loss) | 67,954 | (24,830) |
| Grants | 108,994 | 1,000,000 |
| Contributions | 378,909 | 69,169 |
| Other income | 0 | 0 |
| Total Revenue and Gains | 579,698 | 1,079,031 |
| OPERATING EXPENSES AND GRANTS | | |
| Program services | | |
| Grants | 27,171 | 68,519 |
| Administrative and general | 337,389 | 148,696 |
| Total Operating Expenses and Grants | 364,560 | 217,215 |
| Change in unrestricted net assets | 271,203 | 879,506 |
| Change in temporarily restricted net assets | (45,127) | (17,690) |
| Change in net assets | 226,076 | 861,816 |
| Unrestricted net assets end of year | 4,101,886 | 3,830,683 |
| Temporarily restricted net assets end of year | 38,055 | 83,212 |
| TOTAL NET ASSETS END OF YEAR | 4,139,941 | 3,913,895 |



"Service Above Self" is the motto of Rotary, and it is demonstrated each day by the Club, along with Rotary Camps & Services and Rotary Charities. I am thankful that Rotarians long ago had the foresight and vision to create the structure that enables us to steward our resources appropriately. I am proud to have served as President."

— Mike Meindertma
President, 2016-2017

BOARD

- Mike Meindertma, President
- John Racine, President Elect
- Dale Chilcote, Past President
- Bob Stow, Secretary
- Alan Olson, Treasurer
- Monica Larsen
- Patrick Parker
- Mark Eckhoff
- Mark A. Newhouse
- Tom Haase
- Andrew Robitshek

Kathy Bussell
Club Administrator
tcrotary2822@gmail.com



ROTARY CLUB of Traverse City



ROTARIAN GIVING

- Through Rotary Show proceeds, \$49,400 in grants was awarded to 25 different nonprofits via the Good Works Fund.
- Rotarians provided \$60,000 in direct and/or leveraged monies to projects in Haiti, Peru, Guatemala and all around the world.
- Individual Rotarians contributed close to \$30,000 to the Rotary Foundation, supporting projects in the United States and abroad.
- Almost \$8,000 in matching contributions was distributed to local nonprofits who receive support from Rotarians.
- Close to \$14,000 was raised through TAG Day and granted to projects impacting people with disabilities and special needs.
- Almost \$9,000 was donated to local youth programs.
- 85 local families were assisted through the Rotarian Christmas Basket efforts, with gifts totaling more than \$14,000.
- \$3,500 was donated to Wheels of Hope.
- The 14th Annual Friends of the Boardman Gourmet Dinner raised \$12,864, which was donated to projects benefiting the Boardman River.





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ROTARY CHARITIES BOARD



Not pictured, Allison Beers and Gregg Smith

Elaine Wood, Chair

John Racine, Vice Chair

Jeff Hickman, Treasurer

Allison Beers

Marlene Bevan

Mark Eckhoff

John Hall

Beth Karczewski

Sid Lammers

Gregg Smith