



# Rotary of Traverse City

2015 - 2016 Annual Report





# ROTARY CHARITIES

*We envision a region of vibrant, connected communities where all people and ecosystems thrive.*

We believe the month of May 2016 could be considered one of the most significant months in our Rotary organizations' 40-year history. Two major decisions were made that month that will have significant impact on our region for years to come. On May 2nd Rotary Camps & Services purchased the former Traverse City Light & Power Coal Dock with the support of a \$1million grant from Rotary Charities. Just one week later on May 9th, after two years of research, study and discussion, the Rotary Charities Board unanimously decided to solidify our commitment to transformation and fully embrace a change-making culture.

Transforming a former industrial coal dock into a public park and community harbor exemplifies our new direction and vision of "vibrant, connected communities". At Discovery Pier people of all ages and abilities will be able to **connect** with each other, **learn** about Great Lakes maritime heritage and gather ideas on how we can protect our precious fresh water resources while **adapting** to a changing climate.

Our partners at both the Discovery Center and Pier will be **collaborating** to share programs, facilities and resources. Rotary will be working with **cross-sector partners** like Elmwood Township and merchants along the corridor to transform this corridor into an economic driver and regional asset.

We invite you to visit Discovery Center and Pier and enjoy this latest Rotary Legacy Project for the Community.



Marsha Smith  
Executive Director



Gregg Smith  
Board Chair



# ROTARY CHARITIES: GRANTS



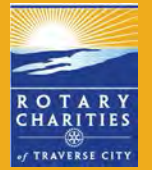
**\$2,314,907**  
in grants awarded

Organization	Amount	Purpose
Acme Christian Store & Food Pantry	\$8,000	OCA*
Artists Creating Together Grand Traverse	\$5,000	Marketing Support
Banks Township	\$30,000	Banks Township Hall Restoration
Bay Area Recycling for Charities	\$20,000	Capacity Building
Bellaire Community Youth Initiative	\$8,000	OCA*
Benzie Home Health Care	\$7,250	Improving Marketing & Technical Capacity
Benzie Home Health Care	\$10,000	Strategic Restructuring
Benzie Area Transportation Authority & BATA	\$35,000	Non-Emergency Medical Transportation
Big Brothers Big Sisters of Northwest Michigan	\$5,000	Planning Academic Success
Cerulean Center	\$5,000	Bioblitz Program
Cherryland Humane Society	\$8,000	OCA & Staffing Requirements Study
Child and Family Services of NW MI	\$45,000	Trauma Assessment and Treatment Center
Community Resource Development	\$5,000	Feasibility Study

Organization	Amount	Purpose
Community Services Network of Michigan	\$20,000	Business Planning
Conflict Resolution Services	\$8,000	OCA*
Crooked Tree Arts Council, Inc.	\$17,500	Continuing Merger Work
Crosshatch	\$5,000	OCA*
Crosshatch	\$45,000	Capacity Building
Disability Network Northern Michigan	\$8,649	Fund Development Capacity Building
Family Partnership Grand Traverse	\$35,000	Little Collaborative
FLOW	\$40,000	Capacity Building
Garfield Township	\$40,878	Pickleball Courts
Glen Arbor Art Association	\$40,000	Building Renovations
Grand Traverse Bay YMCA	\$50,000	Sustainability for Central Y
Grand Traverse County Parks & Rec	\$5,000	Sustainability plan for Easling Pool
Grass River Natural Area	\$24,954	Capacity Building
Grand Traverse Area Community Living Management Corp.	\$25,000	Brickways Community Living Center Expansion
Groundwork Center for Resilient Communities	\$36,000	Rail Transportation Planning

\* OCA = Organizational Capacity Assessment

# ROTARY CHARITIES: GRANTS



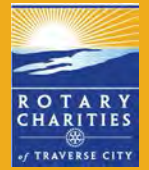
Organization	Amount	Purpose
Habitat for Humanity Grand Traverse	\$35,000	Depot Neighborhood
Health Department of Northwest MI	\$45,000	Oral Health Coalition
Inland Seas Education Association	\$34,941	Discovering the Great Lakes Program
Joyfield Township	\$20,000	Lakes to Land Regional Initiative
Kalkaska County Library	\$5,000	Fundraising Feasibility Study
Leelanau Early Childhood Development Commission	\$5,000	Parenting Communities
Leelanau Peninsula Economic Foundation	\$5,000	Business Survey
Legal Services of Northern Michigan	\$9,660	Homelessness Response- Free Legal Services
Michigan Legacy Art Park	\$4,000	Salesforce Implementation
Milton Township	\$30,000	Boat Launch & Water Trailhead
Networks Northwest	\$40,000	Northern Michigan Health Coalition
Northern Family Intervention Services	\$8,000	OCA*
Northwest Michigan Community Action Agency	\$25,000	Communications & Development
Northwest Michigan Community Action Agency	\$5,000	Youth Housing Initiative
Parallel 45, Inc.	\$35,000	Communications & Fund Development
Preserve Hickory	\$100,000	Master Plan Implementation
Rainbow of Hope Farm	\$6,000	Red Shed Country Store & Capacity Building
Rotary Camps & Services	\$1,000,000	Discovery Pier
Saving Birds Thru Habitat	\$8,000	OCA*

Organization	Amount	Purpose
SEEDS	\$2,500	Architectural Planning
Stoneshouse, Inc.	\$35,000	Dann's House
TART Trails, Inc.	\$5,000	Market Research
Traverse Bay Area Intermediate School District Career-Tech Center	\$5,000	3D Printer Program Fundraising Plan
The Nature Conservancy	\$25,000	Eastern Lake Michigan Coast Invasive Species Removal
The Watershed Center Grand Traverse Bay	\$8,000	OCA*
Traverse Bay Children's Advocacy Center	\$25,000	Building Renovation
Traverse Bay Children's Advocacy Center	\$3,750	Salesforce Implementation
Traverse City Police Department	\$5,000	Community Engagement
Traverse City / Garfield Township Recreation Authority	\$3,600	Strategic Planning
Traverse Health Clinic	\$45,000	New Space & Re-location
Utopia Foundation	\$15,000	Young Peacebuilders Program
Venture North Funding & Development	\$5,000	Organizational Planning for Impact Investing
Village of Ellsworth	\$5,000	Community Engagement & Master Plan Development
Village of Empire	\$15,925	Eastern Neighborhood Sidewalk Connector
Village of Kalkaska DDA	\$5,000	Planning for Capital Improvements
Village of Mancelona	\$35,000	Sidewalk for Safe Routes to Schools
Village of Northport	\$33,300	Trails Connector
Women's Resource Center Grand Traverse	\$25,000	Housing & Client Service Area Renovation

\* OCA = Organizational Capacity Assessment

**TOTAL: \$2,314,907**

# ROTARY CHARITIES



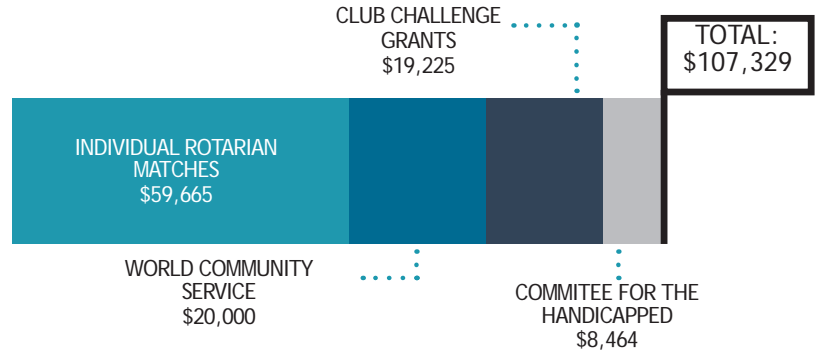
GRANTEES REPORTED  
LEVERAGING

**\$729,770**

WITH THEIR  
ROTARY CHARITIES  
GRANTS



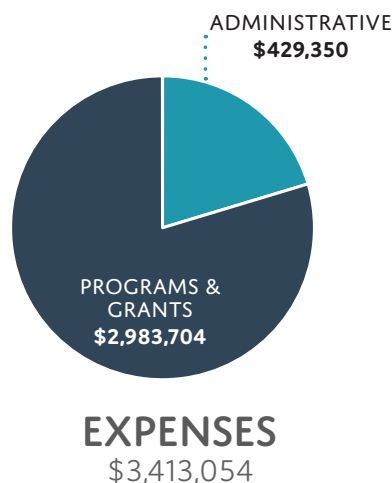
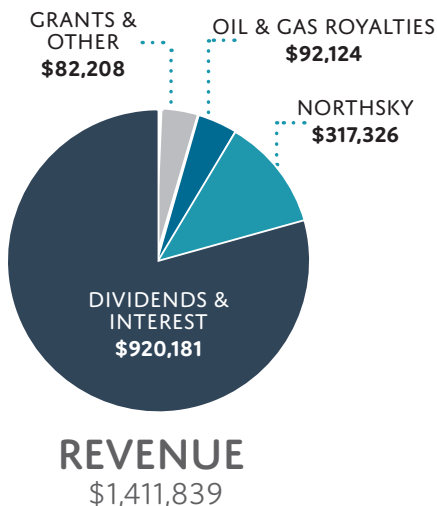
## Rotary Endowment Grants from the Grand Traverse Regional Community Foundation



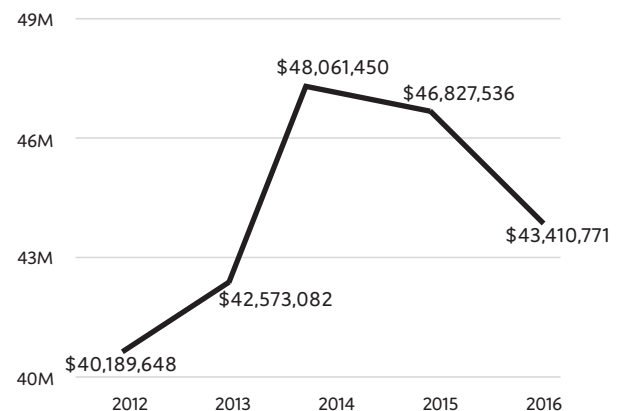
“The Ellsworth-Atwood community has many assets: phenomenal natural resources, a strong agricultural base, amazing recreational facilities, a great school, and passionate, community-minded residents. However, like many small communities in northern Michigan, the economic decline of the past decade hit the area hard. Local businesses closed and many families left the area in search of employment. Many of those year-round residents who did not or could not move are now under-employed and living in sub-standard housing.

Thanks to the Rotary Charities and their talented consultants, the Ellsworth community is in the process of actively designing its future. We have identified our needs and have set goals. We have a plan and are confident we will remain a vital and thriving community in the region.”

- Lynn Spearing, Village of Ellsworth Council Member



## FIVE YEAR PORTFOLIO GROWTH





In 2015-16 NorthSky served over **250** nonprofits, units of government, and schools from across the state.

## CONSULTING



64 organizations & 5 networks served



over 3,000 consulting hours

13 consultants provided services

## PROFESSIONAL DEVELOPMENT



over 550 total attendees

16

nonprofit leaders received leadership coaching



over 225 organizations

26 workshops offered in 3 cities

“It is incredibly exciting to work within a community of committed consultants and funders to develop new ways to strengthen networks. I feel we are having an impact at three levels: we are helping local organizations become more efficient and effective at fulfilling their missions, we are helping networks of organizations and individuals sustainably tackle complex problems, and we are creating best practice road maps that others can follow. Wow!”

- Woody Smith, NorthSky Consultant



“I am very proud of the work our board members have put into the purchase and improvement of the Discovery Center Pier. These efforts will benefit the community for generations.”

— John Hall, Chairperson of the Camps & Services Board

## DISCOVERY CENTER PIER: A HISTORY

2015

JUL  
22

Rotary Charities awards a **\$1,000,000** grant to Rotary Camps & Services to purchase the former coal dock properties

OCT  
5

The City of Traverse City approves the sale of the former coal dock properties to Rotary Camps & Services



2016

JAN  
5

The Purchase Agreement is signed by the City of Traverse City and Rotary Camps & Services

MAY  
2



Rotary Camps & Services closes on the properties

JUN  
7

Traverse City Rotary Club holds its meeting at the former coal dock, cuts the barbed wire, followed by a public grand opening

JUL  
13

The new name is revealed: **Discovery Pier.**  
*History, Education, Stewardship and Recreation.*



# FINANCIAL REPORTS



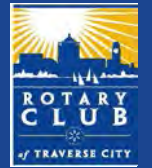
ROTARY CHARITIES	2016	2015
<b>NET ASSETS: BEGINNING OF YEAR</b>	\$46,827,536	\$48,061,450
<b>REVENUES AND GAINS</b>		
Dividends and Interest	920,181	876,724
NorthSky Services	317,326	289,516
Oil and Gas Royalty Income	92,124	210,834
Net Realized and Unrealized Gain (Loss)	(1,415,550)	(51,439)
Grants and Other	82,208	86,285
<b>TOTAL REVENUE AND GAINS</b>	<b>(3,711)</b>	<b>1,411,920</b>
<b>OPERATING EXPENSES AND GRANTS</b>		
Program Services		
Grants*	2,544,389	1,744,254
NorthSky	439,315	489,629
Management and General	429,350	411,951
<b>TOTAL OPERATING EXPENSES AND GRANTS</b>	<b>3,413,054</b>	<b>2,645,834</b>
Change in Unrestricted Net Assets	(3,419,243)	(1,233,784)
Change in Temporary Restricted Net Assets	2,478	(130)
Change in Net Assets	(3,416,765)	(1,233,914)
<b>UNRESTRICTED NET ASSETS: END OF YEAR</b>	<b>43,390,690</b>	<b>46,809,933</b>
<b>TEMPORARY RESTRICTED NET ASSETS: END OF YEAR</b>	<b>20,081</b>	<b>17,603</b>
<b>TOTAL NET ASSETS: END OF YEAR</b>	<b>\$43,410,771</b>	<b>\$46,827,536</b>

\*Includes payments on multiple year grants previously reported.



ROTARY CAMPS & SERVICES	2016	2015
<b>NET ASSETS: BEGINNING OF YEAR</b>	\$3,052,079	\$3,025,775
<b>REVENUES AND GAINS</b>		
Dividends and Interest	34,507	47,576
Oil and Gas Royalty Income	185	5,813
Net Realized and Unrealized Gain (Loss)	(24,830)	(13,807)
Grants	1,000,000	-
Contributions	69,169	89,944
Other Income	0	37,234
<b>TOTAL REVENUE AND GAINS</b>	<b>1,079,031</b>	<b>163,760</b>
<b>OPERATING EXPENSES AND GRANTS</b>		
Program Services		
Grants	68,519	52,892
Administrative and General	148,696	84,564
<b>TOTAL OPERATING EXPENSES AND GRANTS</b>	<b>217,215</b>	<b>137,456</b>
Change in Unrestricted Net Assets	879,406	12,868
Change in Temporary Restricted Net Assets	(17,590)	13,436
Change in Net Assets	861,816	26,304
<b>UNRESTRICTED NET ASSETS: END OF YEAR</b>	<b>3,830,583</b>	<b>2,951,177</b>
<b>TEMPORARY RESTRICTED NET ASSETS: END OF YEAR</b>	<b>83,312</b>	<b>100,902</b>
<b>TOTAL NET ASSETS: END OF YEAR</b>	<b>\$3,913,895</b>	<b>\$3,052,079</b>





Dale Chilcote, President, Traverse City Rotary Club & Dr. John Modlin, Director of Polio Research, Bill & Melinda Gates Foundation

## MESSAGE FROM THE PRESIDENT:

“Week after week I am amazed at the efforts that our members go through to live the motto of Rotary...Service Above Self. Whether it’s flipping burgers at the NMC BBQ, ringing bells for the Salvation Army, collecting winter coats, providing safe drinking water, building schools or fighting polio around the world, Rotarians donate their time and money for the purpose of helping others. It’s been an honor and a privilege to serve as the President of the Rotary Club of Traverse City this past year.”

— Dale Chilcote, President of the Rotary Noon Club



# \$190,816

total raised

### ROTARY FOUNDATION

## \$25,100

GRANTS SUPPORTING  
DISABLED AND  
SPECIAL NEEDS  
(TAG DAY PROCEEDS)

## \$10,105

YOUTH PROGRAMS

## \$9,800

CHRISTMAS BASKETS

## \$8,100

WHEELS OF HOPE

## \$7,500

BOARDMAN RIVER  
(GAME DINNER PROCEEDS)

## \$5,000

OTHER: \$771



# \$42,440

in Good Works Grants  
(Rotary Show Proceeds)

# \$82,000

Donated to World  
Community Service  
Projects

### Projects Supported by World Community Service:

Hermanus Rainbow Trust- South Africa

Peru MSU, Amazon Clinic

Haiti School of Hope

Pure Water for the World- Honduras

Living Positively- AIDS Survivors/Social Enterprise- Kenya

Haitian Water Project

Polio Plus

# Discovery Pier

*History • Education • Stewardship • Recreation*

*A Rotary Legacy to the  
Community*





# Service above Self



## ROTARY CHARITIES STAFF

Marsha Smith  
Executive Director  
Becky Ewing  
Associate Director  
Joe Liszewski  
NorthSky Program Director  
Freya Bradford  
Learning Officer  
Stacey Foster  
Office Manager  
Kathryn Dugal  
Program & Comm. Associate

## ROTARY CHARITIES BOARD

Gregg Smith, Chair  
Elaine Wood, Vice-Chair  
Mack Beers, Treasurer  
Allison Beers  
Marlene Bevan  
Jeff Hickman  
Beth Karczewski  
Sid Lammers  
Mike Meindertsma  
John Racine

## CAMPS & SERVICES BOARD

John Hall, Chair  
Dave Millross, Vice-Chair  
Al Olson, Secretary/Treasurer  
Chris DeGood  
Monica Larsen  
Doug Meteyer  
Phil Rosi  
Paul Schmuckal  
Bob Stow  
Sharron Zimmerman

## ROTARY CLUB STAFF

Kathy Bussell  
Club Administrator

## ROTARY CLUB BOARD

Dale Chilcote, President  
Mike Meindertsma, President-Elect  
George Powell, Past-President  
Bob Stow, Secretary  
Al Olson, Treasurer  
Monica Larsen  
Todd Muha  
Pat Parker  
Dan Rickard  
Andy Robitshek  
Tim Tate

202 E. Grandview Pkwy  
Traverse City, MI 49684  
[traversecityrotary.org](http://traversecityrotary.org)

