

A year of  
**SERVICE to our REGION**  
 2014-2015 ANNUAL REPORT

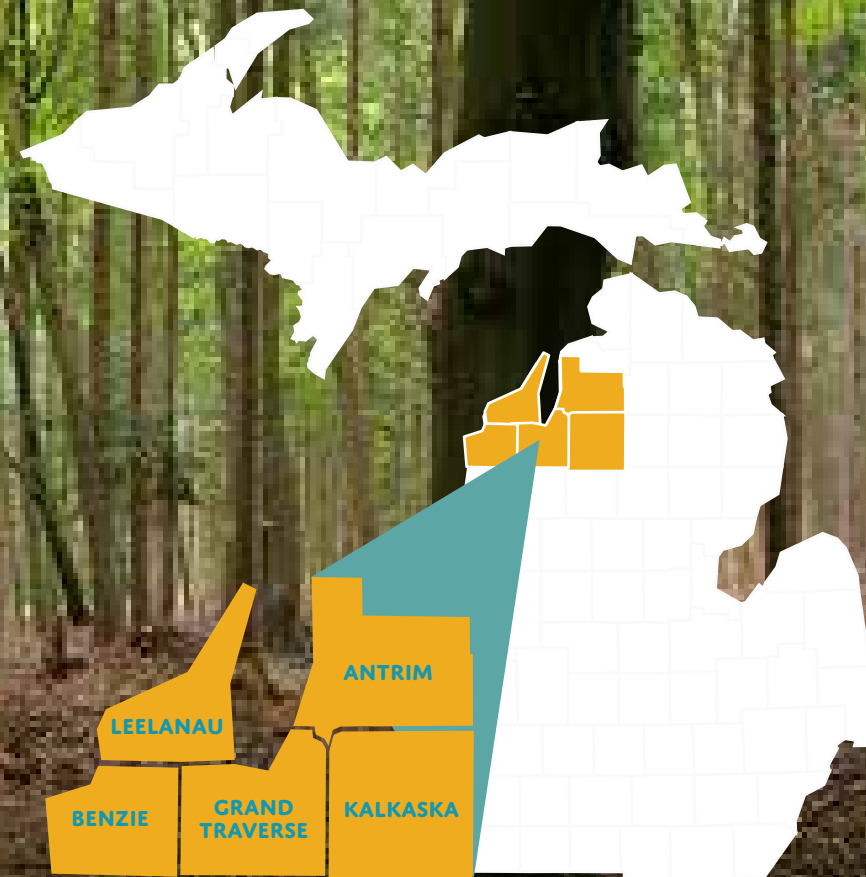






"This year, we lifted our focus to consider longer-term community impact and began to more fully utilize our resources beyond just our grant dollars to help strengthen our region."

-GREGG SMITH, ROTARY CHARITIES BOARD CHAIR



Rotary Charities awards grants to the **five-county Grand Traverse region**. NorthSky provides services in ten counties.



"Rotary Charities mission has evolved over the years from funding bricks and mortar, to supporting programs and helping organizations build their capacity. Our focus has largely been on supporting individual nonprofit organizations to become the best they can be. This year, we lifted our focus to consider longer-term community impact and began to more fully utilize our resources beyond just our grant dollars to help strengthen our region."

-GREGG SMITH, ROTARY CHARITIES BOARD CHAIR

## 2015 STRATEGIC DIRECTION



**UNLOCK, LEVERAGE & ATTRACT RESOURCES**



**INCREASE THE CAPACITY OF ORGANIZATIONS, NETWORKS & SYSTEMS**



**FOSTER & PROVIDE LEADERSHIP**



**PROMOTE COMMUNITY COLLABORATION**





**\$1,529,604**  
in total grants awarded

**TOTAL GRANTS AWARDED 2014-2015**  
**\$1,529,604**



**LEVERAGING OUR GRANTS**

A grant from Rotary Charities enables many of the recipients to acquire additional funding from other sources through direct and indirect leveraging.

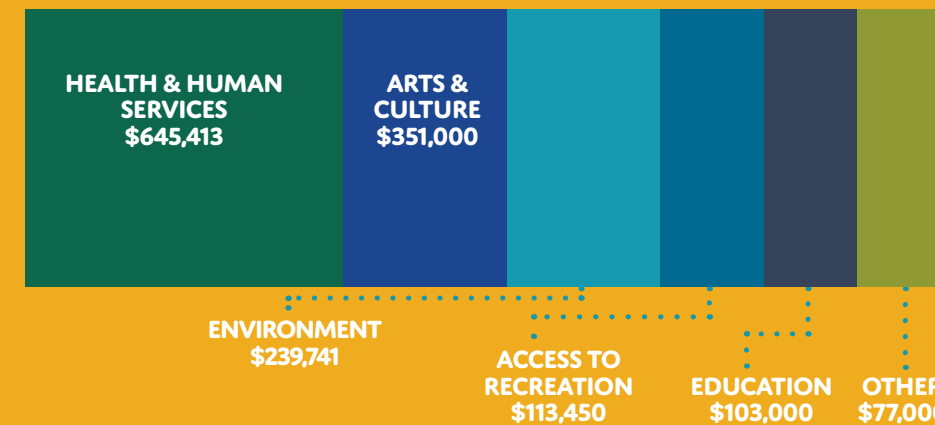


**GRANTEES REPORTED LEVERAGING OVER \$2 MILLION DOLLARS WITH THEIR ROTARY CHARITIES GRANTS.**

Visit [www.traversecityrotary.org](http://www.traversecityrotary.org) for more information.



**GRANTS BY SECTOR:**



**SUCCESS STORY: PROGRAM GRANT**



"This grant has provided the impetus for tremendous program enhancements at ISEA. Not only has it allowed ISEA to expand our program options, but more importantly it is assisting ISEA in strengthening our business practices. A new line of programming combined with a social enterprise business model is helping the organization impact increasing numbers of individuals with our important mission of inspiring Great Lakes curiosity, stewardship and passion."

**-FRED Z. SITKINS, EXECUTIVE DIRECTOR, INLAND SEAS EDUCATION ASSOCIATION**



## ARTS & CULTURE

Organization	Type	Amount
ArtCenter Traverse City	Program	\$50,000
Botanical Garden Society of Northwest Michigan	Organizational Capacity Building	\$20,000
City Opera House Heritage Association	Capital	\$95,000
Community Foundation (Historic Barns Park)	Capital	\$95,000
Elk Rapids Area Historical Society	Capital	\$20,000
Fishtown Preservation Society, Inc.	Planning	\$5,000
National Writers Series of Traverse City	Planning	\$8,000
Parallel 45, Inc.	Planning	\$8,000
Traverse City Film Festival	Capital	\$50,000
<b>Total:</b>		<b>\$351,000</b>

## ACCESS TO RECREATION

Organization	Type	Amount
City of Traverse City	Planning	\$5,000
Involved Citizens Enterprise (I.C.E.)	Capital	\$68,700
Northern Michigan Mountain Bike Association	Capital	\$7,000
Northport Youth Sailing School	Capital	\$27,750
Preserve Hickory	Planning	\$5,000
<b>Total:</b>		<b>\$113,450</b>

## ENVIRONMENT

Organization	Type	Amount
Bay Area Recycling for Charities	Planning	\$8,000
Cerulean Center	Planning	\$3,900
Grand Traverse Conservation District	Planning	\$5,000
Grand Traverse Conservation District	Planning	\$5,000
Grand Traverse Regional Land Conservancy	Planning	\$5,000
Grass River Natural Area	Organizational Capacity Building	\$36,341
Goodwill Industries of Northern Michigan	Planning	\$5,000
Grow Benzie	Planning	\$8,000
Inland Seas Education Association	Program	\$50,000
Land Information Access Association	Planning	\$8,000
Rotary Camps & Services	Program	\$31,500
SEEDS	Organizational Capacity Building	\$25,000
The Nature Conservancy	Program	\$25,000
The Watershed Center Grand Traverse Bay	Planning	\$9,000
Traverse City/ Garfield Township Recreation Authority	Program	\$10,000
Village of Kingsley	Planning	\$5,000
<b>Total:</b>		<b>\$239,741</b>

"TO CHANGE THE WORLD we need to **PLUG IN.**"

-SARNA SALZMAN, EXECUTIVE DIRECTOR, SEEDS



## SUCCESS STORY: CAPACITY BUILDING GRANT



"Organizational capacity is complex and evolving. Just as it takes more than knowledge to change the world it takes more than money to create capacity. To change the world we need to plug in. Rotary Charities is plugging into SEEDS so that we may plug into the lives of the next generation and the next and the next and the next for a beautiful, strong, resilient Michigan."

-SARNA SALZMAN, EXECUTIVE DIRECTOR, SEEDS



"For our community, Historic Barns Park is a place to dream big, a platform to come together, & a tangible example of what a powerful combination that can be."

-MATT COWALL, EXECUTIVE DIRECTOR, CITY OF TRAVERSE CITY & CHARTER TOWNSHIP OF GARFIELD RECREATIONAL AUTHORITY

## SUCCESS STORY: CAPITAL GRANT



"Twenty years ago, you could've been forgiven for thinking that the old barns at the former state hospital should just be torn down and the land sold off for development. But now, when people step into the renovated Cathedral Barn for the first time and look up at that soaring ceiling, the phrase I hear most often is, "We're so lucky that this is still here!" And nearly every visitor has a story to share about another special building or place in their lives that wasn't so fortunate. That this relatively small community cared enough – and dared enough – to try the hard way instead of settling for the easy way is a testament to everyone who lives here and something we can all be proud of."

-MATT COWALL, EXECUTIVE DIRECTOR, CITY OF TRAVERSE CITY & CHARTER TOWNSHIP OF GARFIELD RECREATIONAL AUTHORITY

### HEALTH & HUMAN SERVICES

Organization	Type	Amount
Addiction Treatment Services	Planning	\$5,000
Alzheimer's Association - Northern Michigan Region	Program	\$10,000
Benzie County Council on Aging, Inc.	Planning	\$4,500
Benzie Home Health Care	Organizational Capacity Building	\$14,355
Benzie Area Christian Neighbors	Planning	\$5,000
Bethany Christian Services	Program	\$17,250
Community Services Network of Michigan	Program	\$42,500
Disability Network of Northern Michigan	Organizational Capacity Building	\$17,298
Grand Traverse Pavilions Foundation	Capital	\$99,000
Habitat for Humanity Grand Traverse Region	Organizational Capacity Building	\$50,000
Northwest Michigan Supportive Housing	Organizational Capacity Building	\$15,000
Northwest Michigan Community Action Agency	Organizational Capacity Building	\$35,000
Planned Parenthood of West & Northern Michigan	Program	\$10,110
Rainbow of Hope Farm	Program	\$12,400
Safe Harbor of Grand Traverse, Inc.	Planning	\$8,000
Stoneshouse, Inc.	Program	\$50,000
The Rotary Foundation (End Polio Now)	Program	\$250,000
	<b>Total:</b>	<b>\$645,413</b>

### EDUCATION

Organization	Type	Amount
Human Nature School	Planning	\$3,000
Interlochen Public Library	Capital	\$100,000
	<b>Total:</b>	<b>\$103,000</b>

### OTHER

Organization	Type	Amount
Community Foundation	Other	\$17,000
Rotary Charities	Network Learning	\$60,000
	<b>Total:</b>	<b>\$77,000</b>



# ROTARY CHARITIES: NORTHSKY



**WHAT WE DO** NorthSky Nonprofit Network is the capacity building program of Rotary Charities and provides the region's nonprofits with consulting, professional development, coaching services and tools to help build their capacity and support sustainability.



"When the Cherryland Humane Society was faced with the opportunity to hire a new executive director the board knew it needed help. **NorthSky coached us through the process, giving us the tools needed for our search committee to successfully hire our new director.**"

-KAREN KUEHLHORN, BOARD OF DIRECTORS, CHERRYLAND HUMANE SOCIETY

 **MORE THAN 270**  
ORGANIZATIONS RECEIVED SERVICES

NorthSky has broad expertise and provides services in the areas of strategic planning, board governance, leadership development and team building, succession planning and transitions, program planning and evaluation, financial management and fund development.

## PROFESSIONAL DEVELOPMENT

 **OVER 560**  
TOTAL WORKSHOP ATTENDEES

**98%**

PARTICIPANTS PLAN TO USE WHAT THEY LEARNED TO IMPROVE THEIR WORK

 **OVER 225**  
ORGANIZATIONS

**17**

NONPROFIT LEADERS RECEIVED ONE-ON-ONE LEADERSHIP COACHING

## CONSULTING

 **77** ORGANIZATIONS

**89%**

OF ORGANIZATIONS BELIEVE THAT THEIR WORK WITH NORTHSKY WILL HELP THEM MEET THEIR MISSION MORE EFFECTIVELY & INCREASE THEIR ORGANIZATION'S SUSTAINABILITY

 **2,737**  
CONSULTING HOURS

**90%**

OF CLIENTS WOULD CONSIDER HIRING THE CONSULTANT THEY WORKED WITH AGAIN

## SUCCESS STORY: LEADERSHIP COACHING



"The leadership coaching services provided through NorthSky have vastly improved our internal organization and communication. We have worked with a top-notch executive coach on both an individual basis and as an entire management team. Our goal was to become a high performing team while enhancing our leadership skills. The results have been extraordinary and we are now poised for even greater success in the future."

-GLEN CHOWN, EXECUTIVE DIRECTOR,  
GRAND TRAVERSE REGIONAL LAND CONSERVANCY



# ROTARY CAMPS & SERVICES: WE STEWARD LAND

**MISSION** Our mission is to leverage resources and volunteers to preserve and enhance the natural environment of the five-county Grand Traverse region. We provide leadership by encouraging proactive, collaborative partnerships for land conservation/stewardship, recreation, camping and other projects that meet community needs.



## PROPERTIES:



**CAMP SAKAKAWEA**  
564 acres



**DISCOVERY CENTER GREAT LAKES**  
9 acres



**CAMP GREILICK**  
496 acres



**EAST CREEK RESERVE**  
556 acres

# SHARING RESOURCES leads to **COMMUNITY IMPACT**



**GREAT LAKES CHILDREN'S MUSEUM**



**WATERSHED CENTER**



**MARITIME HERITAGE ALLIANCE**



**TRAVERSE AREA COMMUNITY SAILING**

## SPOTLIGHT ON THE DISCOVERY CENTER

The Discovery Center is a collaborative freshwater campus committed to the promotion of historic preservation, the importance of environmental stewardship, the joy of discovery and the pleasure of water-based recreation. Four partners currently at the site are: the Great Lakes Children's Museum, the Watershed Center, the Maritime Heritage Alliance and Traverse Area Community Sailing.

Visit [www.traverserotationary.org](http://www.traverserotationary.org) for more information.



The embodiment of  
**SERVICE  
ABOVE SELF**



**ROTARIANS IN OUR COMMUNITY**

Check out all of the exciting projects that members of the Rotary Club volunteer for:

**CHRISTMAS BASKETS**

These donations provide holiday gifts and food for more than 40 area families in need.

**ONE WAY COAT DAY**

Rotarians orchestrate donations of winter coats, mittens, and hats.

**MUNSON MANOR DINNER**

Rotarians host a monthly dinner for out-of-town families staying at Munson Manor House while their loved ones are hospitalized.

**YOUTH EXCHANGE**

This popular Rotary program supports inbound and outbound exchange students.

**STRIVE PROGRAM**

Members volunteer at Career Networking Day and guests speak at area high schools to increase awareness, confidence and resources for post-secondary and employment opportunities for at-risk youth.

**STUDENT RECOGNITION**

Local high school students are recognized for their academic achievements, leadership, and community involvement.

**GOURMET GAME DINNER**

This annual dinner raises funds for the protection and preservation of the Boardman River.

**NMC BBQ**

Every May, Rotarians cook and serve at the BBQ to raise funds for Northwestern Michigan College.

**SALVATION ARMY BELL RINGING**

Helping those in need during the holiday season.

**FREE FISHING DAY**

Each year Rotarians volunteer at this old-fashioned family fun event!



**GOVERNOR ATTENDS ROTARY CLUB**

(August 5th) Governor Rick Snyder met nearly 300 Rotarians and guests for a Tuesday meeting.

**ROTARIANS  
AT WORK:**







# \$120,357 raised

## MAJOR DONATIONS:

GOOD WORKS GRANTS  
(ROTARY SHOW PROCEEDS)  
**\$36,540**

GRANTS SUPPORTING  
DISABLED AND HANDICAPPED  
(TAG DAY PROCEEDS)  
**\$10,117**

CHRISTMAS BASKETS  
**\$5,971**

YOUTH PROGRAMS  
**\$11,741**

## DONATED FUNDS

### WORLD COMMUNITY SERVICE



# TOTAL: \$55,988

END POLIO NOW (COAST-TO-COAST POLIO RIDE, THIS FISCAL YEAR) **\$7,298**

THE ROTARY FOUNDATION (ROTARY INTERNATIONAL): **\$5,750**

EMPOWER NEPAL FOUNDATION EARTHQUAKE ASSISTANCE: **\$5,000**

HERMANUS RAINBOW FUND: **\$3,940**

NAMASTE DIRECT: **\$2,250**

PICTURED:  
Al Bonney,  
Rotary District Governor

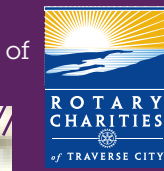
**ANNUAL ROTARY SHOW** (April 22-25th) Our annual show returned home to the State Theatre and we did "Light Up Rotary" for 4 wonderful nights. Attendance, ad sales and dollars all increased this year. A 73-year tradition, this annual vaudeville-style show raises monies every spring for Rotary Good Works community grants.



# UNITING FOR COMMON GOOD

ROTARY CHARITIES, ROTARY CLUB, CAMPS & SERVICES

**THE STORY** Rotary Charities was one of the first funders to recognize the importance of the dam removal project and support engaging the public in the process. And because Rotary Charities, Rotary Club and Camps & Services teamed up, we can proudly say we were a major part of one of the largest wetland restorations in the Great Lakes Basin.



## CREATING NEW LIFE in a NATURAL GEM

1

Rotary Charities:  
HAS SUPPORTED THE PUBLIC  
PROCESS, LEADERSHIP, PLANNING  
AND ECONOMIC DEVELOPMENT.  
TO DATE, ROTARY CHARITIES  
HAS SUPPORTED THE PROJECT  
WITH \$400,000.

2

Rotary Club:  
ANNUAL GOURMET GAME  
DINNER PROCEEDS SUPPORT  
THE CONSERVATION DISTRICT'S  
WORK ON THE BOARDMAN.  
TO DATE, OVER \$100,000 HAS  
BEEN RAISED.

3

Camps & Services:  
OWNS 1200 ACRES IN THE  
BOARDMAN RIVER VALLEY  
AND ORGANIZES ANNUAL  
WORK BEES TO IMPROVE  
HABITAT IN THE  
WATERSHED.

"For many reasons Rotary's Gourmet Game Dinner came at the perfect time in our effort to restore the beautiful Boardman River. Proceeds from the first dinner allowed the Conservation District to update and digitize the erosion inventory that was originally done in 1991. Since then, **this critical funding has allowed us to improve river access sites, restore eroding banks, plant thousands of seedlings along the banks of the river, and install over a 1,000 feet of oak tops** to improve instream habitat in the new section of river at Brown Bridge."

**-STEVE LARGENT, CONSERVATION TEAM COORDINATOR,  
GRAND TRAVERSE CONSERVATION DISTRICT**



### DURING THE RESTORATION:



### THE FUTURE: BOARDMAN PROSPERITY PLAN

Currently, a strategy is being coordinated to prioritize projects and acquire funding. Over \$20 million of stream improvement and economic development projects have been identified. This would be the first-ever watershed plan to incorporate economic development, social and cultural values.

Visit [www.traverserotationary.org](http://www.traverserotationary.org)  
for more information.



# UNITING FOR COMMON GOOD

ROTARY CHARITIES, ROTARY CLUB, CAMPS & SERVICES

**THE STORY** Rotary Charities, Rotary Camps & Services and Rotary Club teamed up to help end polio.



# \$877,878

raised to end polio

All donations went to Rotary International Polio Plus for polio eradication and were matched 2:1 by the Bill and Melinda Gates Foundation, turning every \$100 donation into \$300 to eliminate polio.

**WORKING TOGETHER FOR A GREATER GOOD**  
(October 23rd) For World Polio Day, Rotary Club of Traverse City collaborated with the Sunrise and Twilight Rotary Clubs to show "The Shot Felt Round the World" - the Jonas Salk polio story.



## HOW WE DID IT:

ROTARY CLUB USED CROWD-SOURCING (COAST TO COAST POLIO RIDE)

# \$33,898

ROTARY CHARITIES GRANTED

# \$250,000

MEMBERS CONTRIBUTED TO CAMPS & SERVICES FOR A TOTAL OF

# \$5,500

CASH DONATIONS AT FILM EVENT

# \$703

# \$2,525

MATCHED BY THE ROTARY ENDOWMENT AT THE COMMUNITY FOUNDATION

THIS TOTALED

# \$292,626

AND THEN...

**BILL & MELINDA GATES FOUNDATION**

MATCHED IT 2:1 FOR A TOTAL OF

# \$877,878



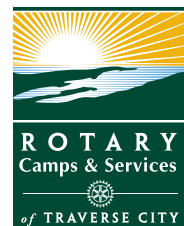
# ORGANIZATIONAL HEALTH

## FINANCIAL REPORTS



ROTARY CHARITIES	2013-2014	2014-2015
<b>NET ASSETS, BEGINNING OF YEAR</b>	\$42,573,082	\$48,061,450
<b>REVENUES AND GAINS</b>		
Dividends and Interest	919,326	867,724
NorthSky Services	292,944	289,516
Oil and Gas Royalty Income	299,201	210,834
Net Realized and Unrealized Gain (Loss)	5,994,328	(51,439)
Grants and Other	51,094	86,285
<b>TOTAL REVENUE AND GAINS</b>	<b>7,556,893</b>	<b>1,411,920</b>
<b>OPERATING EXPENSES AND GRANTS</b>		
Program Services		
Grants*	1,231,120	1,744,254
NorthSky	416,816	489,629
Management and General	420,589	411,951
<b>TOTAL OPERATING EXPENSES AND GRANTS</b>	<b>2,068,525</b>	<b>2,645,834</b>
Change in Unrestricted Net Assets	5,488,107	(1,233,784)
Change in Temporary Restricted Net Assets	261	(130)
Change in Net Assets	5,488,368	(1,233,914)
<b>UNRESTRICTED NET ASSETS: END OF YEAR</b>	<b>48,043,717</b>	<b>46,809,933</b>
<b>TEMPORARY RESTRICTED NET ASSETS: END OF YEAR</b>	<b>17,733</b>	<b>17,603</b>
<b>TOTAL NET ASSETS: END OF YEAR</b>	<b>\$48,061,450</b>	<b>\$46,827,536</b>

\*Includes payments on grants awarded in prior fiscal years, but dispersed this fiscal year. This amount differs from grant award totals in previous pages.



ROTARY CAMPS & SERVICES	2013-2014	2014-2015
<b>NET ASSETS, BEGINNING OF YEAR</b>	\$2,991,542	\$3,025,775
<b>REVENUES AND GAINS</b>		
Dividends and Interest	31,419	47,576
Oil and Gas Royalty Income	36,223	5,813
Net Realized and Unrealized Gain (Loss)	(6,650)	(13,807)
Grants	49,575	-
Contributions	50,903	86,944
Other Income	0	37,234
<b>TOTAL REVENUE AND GAINS</b>	<b>161,470</b>	<b>163,760</b>
<b>OPERATING EXPENSES AND GRANTS</b>		
Program Services		
Grants	53,945	52,892
Administrative and General	73,292	84,564
<b>TOTAL OPERATING EXPENSES AND GRANTS</b>	<b>127,237</b>	<b>137,456</b>
Change in Unrestricted Net Assets	6,899	12,868
Change in Temporary Restricted Net Assets	27,334	13,436
Change in Net Assets	34,233	26,304
<b>UNRESTRICTED NET ASSETS: END OF YEAR</b>	<b>2,938,309</b>	<b>2,951,177</b>
<b>TEMPORARY RESTRICTED NET ASSETS: END OF YEAR</b>	<b>87,466</b>	<b>100,902</b>
<b>TOTAL NET ASSETS: END OF YEAR</b>	<b>\$3,025,775</b>	<b>\$3,052,079</b>



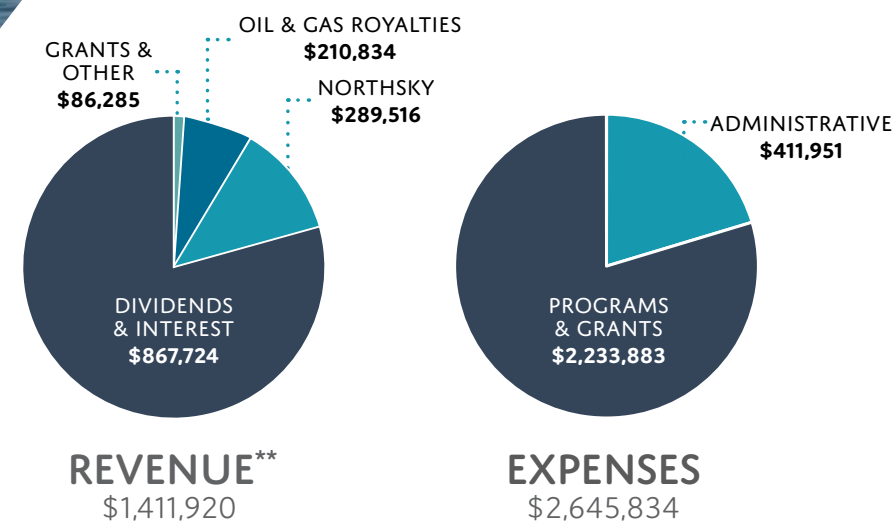
Over the last 37 years, **Rotary Charities has granted over \$54 million to organizations in our five-county region.** These grants have spurred economic development, enriched arts, preserved the environment, guaranteed access to recreation and increased our quality of life.



In 1999, Rotary Charities donated \$2.5 million to the Community Foundation to establish the Rotary Endowment. Today, the Rotary Endowment provides an opportunity for individual Rotarians and local Rotary Clubs to have their philanthropic support matched by the Community Foundation.

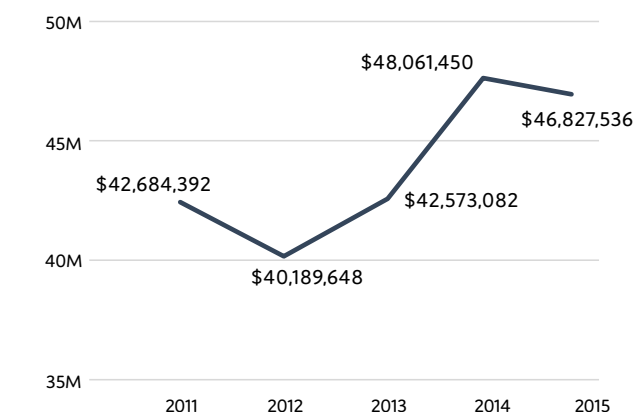
**\$83,260 IN FUNDS WERE MATCHED BY THE ROTARY ENDOWMENT AT THE COMMUNITY FOUNDATION!\***

\*\*Between July 1, 2014 and June 30, 2015.



\*\*Totals in chart do not include net realized and unrealized loss.

### FIVE YEAR PORTFOLIO GROWTH





# A YEAR IN REVIEW

SEPT

Rotary Charities grants \$250,000 to Rotary International for the "End Polio" campaign.



OCT

Hildy Gottlieb, from Creating the Future is the keynote speaker at the Council of Michigan Foundation's annual conference, sponsored by Rotary Charities.



DEC

Rotary Charities awards over \$580,000 in grants to 21 organizations.

FEB

5 people earn their Certificate of Fundraising Management through NorthSky's partnership with Indiana University's Fundraising School.



Launching of the new website. ([www.traverserocityrotary.org](http://www.traverserocityrotary.org))

MAR

APR

The Oleson Foundation supports NorthSky Professional Development Series with a \$5k grant.

MAY

National network expert, June Holley spends three days with the community and Charities staff on network innovation.



The 73rd Annual Rotary Show raises \$36,540 for Good Works grants back to the community.

The Traverse City Rotary Clubs plan and host the Rotary District 6290 Annual Conference, District Governor Al Bonney presiding.



JUN

Rotary Charities awards over \$460,000 in grants.

9th Annual Kid's Free Fishing Day.



## STAFF

Marsha Smith  
*Rotary Charities Executive Director*

Becky Ewing  
*Rotary Charities Associate Director*

Joe Liszewski  
*NorthSky Program Director*

Freya Bradford  
*Rotary Charities Learning Officer*

Stacey Foster  
*Rotary Charities Office Manager*

Kathryn Dugal  
*Rotary Charities Program Associate*

Kathy Bussell  
*Rotary Noon Club Executive Director*

## ROTARY CHARITIES BOARD

Gregg Smith, *Chair*  
Elaine Wood, *Vice-Chair*

Mack Beers, *Treasurer*

Allison Beers

Marlene Bevan

Jeff Hickman

Beth Karczewski

Sid Lammers

Dale Chilcote

John Racine

## CAMPS + SERVICES BOARD

John Hall, *Chair*

Dave Millross, *Vice-Chair*

Al Olson, *Secretary/Treasurer*

Chuck Downey

Chris Degood

Doug Meteyer

Phil Rosi

Paul Schmuckal

Sharron Zimmerman

Bob Stow

## CLUB BOARD

George Powell, *President*

Dale Chilcote, *President Elect*

Jeff Hickman, *Past-President*

Bob Stow, *Secretary*

Al Olson, *Treasurer*

Chuck Downey, *Director*

John Hall, *Director*

Chris Peregrine, *Director*

Todd Muha, *Director*

Dan Rickard, *Director*

Tim Tate, *Director*

231.941.4010

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202 E. Grandview Parkway,  
Traverse City, MI 49684

[TRAVERSECITYROTARY.ORG](http://TRAVERSECITYROTARY.ORG)  
[NORTHSKYNONPROFITNETWORK.ORG](http://NORTHSKYNONPROFITNETWORK.ORG)