

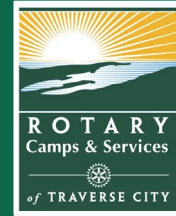
Service above self



**ROTARY
CLUB**



**ROTARY
CHARITIES**



**ROTARY
CAMPS & SERVICES**

ANNUAL REPORT

2013-14

202 E. Grandview Parkway
Traverse City, MI 49686



ROTARY CHARITIES



It's been a busy year at Rotary Charities. We re-organized the staffing structure; adding a Learning Officer and Program Assistant position and filling the NorthSky Program Director position. Once the staffing plan was complete, we launched into strategic planning and look forward to growing Rotary Charities' impact. We anticipate the continuing evolution of Rotary Charities will include: providing leadership and developing leaders; building capacity of organizations, networks, and communities; leveraging more resources into our region; and promoting collaboration, partnerships and networks across sectors. It's an exciting time in our history. With over \$58 million in grants to our five-county region since the beginning of our foundation, we strive to be good stewards of this incredible resource.

– Al Bonney, Chairperson of the Rotary Charities Board

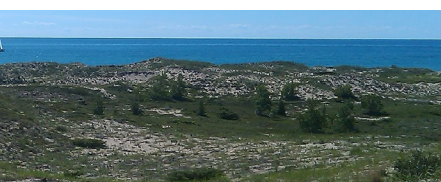
TOTAL GRANTS 2013-14

TOTAL FUNDS GRANTED: \$1,029,933



"Before the Sleeping Bear Heritage Trail existed, there were essentially no trails in the Sleeping Bear Dunes National Lakeshore that were safe and accessible for everyone. We now see people of all ages and physical capabilities using this beautiful trail."

Carol Quarderer, Co-Chair,
Pathways to Sleeping Bear Campaign



"Funding from Rotary Charities has supported controlling and eradicating invasive plant species. This has resulted in the survey and treatment of invasive plants across 30,000 acres of public, private, and conserved lands."

Paul Beczkiewicz, Associate Director
of Philanthropy, The Nature Conservancy

EDUCATION
\$57,000

HEALTH
\$25,000

RECREATION
\$60,000

COMMUNITY
RESOURCES
\$136,450

ENVIRONMENT
\$148,000

ARTS & CULTURE
\$204,920

STRENGTHENING
FAMILIES
\$411,763

"The grant monies provided expert advice on best practices and opportunities to reflect and change. We gained broader perspective and sharper focus that enable us to continue our mission."

Haley Breniser, Executive Director,
Grass River Natural Area



"With the funding to recruit more volunteers and collaborate with more local agencies, we will be able to serve an even greater number of families."

Sarah Hayes,
Family Coach,
Bethany Christian Services



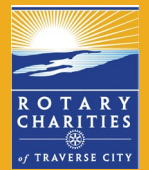
"Funds from Rotary Charities supported ACT's adaptive artist in residency programs for students with disabilities in local special education classrooms."

Dayna Ryan, District Coordinator
Artists Creating Together (ACT)

MISSION Rotary Charities leads positive change in the region by assisting community organizations to better achieve their missions. We do this by providing resources and grants; providing leadership; providing a Management Support Organization for the nonprofit sector; facilitating strategic partnerships; and promoting philanthropy

VISION Rotary Charities and Rotary Camps & Services will be the collaborative leaders of strategic efforts to achieve positive change in the five-county Grand Traverse region.

ROTARY CHARITIES



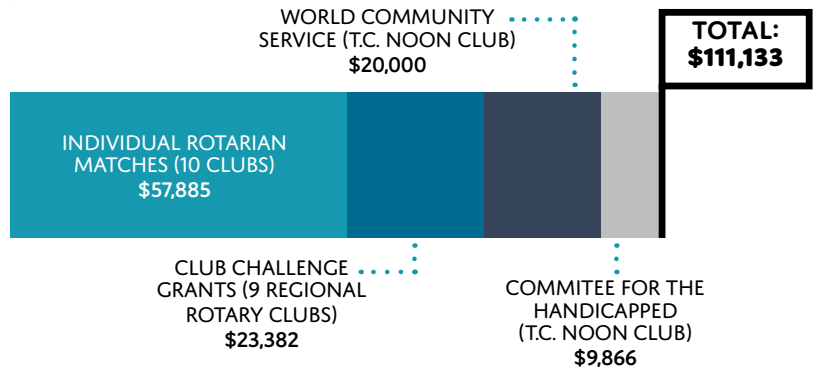
PROMOTING PHILANTHROPY

FOR EVERY \$1 GRANTED BY ROTARY CHARITIES... 

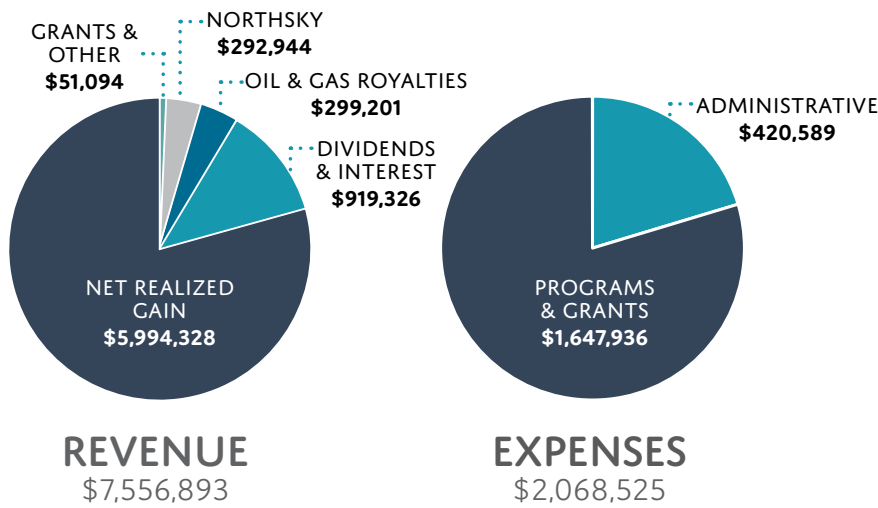
...GRANTEES LEVERAGED AN ADDITIONAL \$3.52 IN FUNDING, TOTALING \$4,631,162.



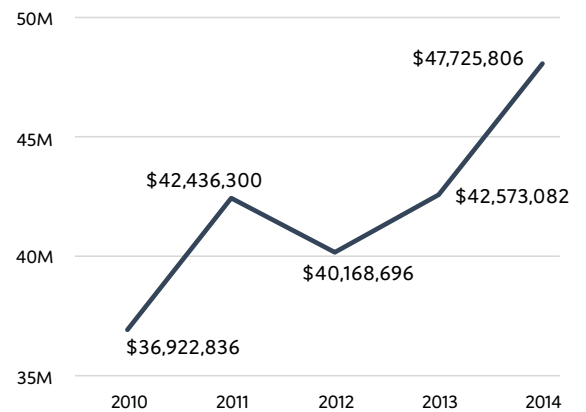
ROTARY ENDOWMENT GRANTS FROM THE GRAND TRAVERSE REGIONAL COMMUNITY FOUNDATION



EFFICIENT & EFFECTIVE ORGANIZATION



FIVE YEAR PORTFOLIO GROWTH



LEADERSHIP & PARTNERSHIPS

Rotary Charities and NorthSky are proud to partner with organizations from around our region. Here is a sampling of groups and networks we worked with this year:

GROUPS

- Athena Advisory Committee
- Council of Michigan Foundations
- Focus Fund Advisory Committee of GT Regional Community Foundation
- Great Lakes Funder Collaborative
- Grand Traverse Regional Funders
- Michigan Community Service Commission
- Michigan Land Use Funders
- Munson Healthcare President's Council

NETWORKS

- Benchmarks Northwest Michigan Steering Committee
- Cultured Communities
- Five to One Steering Committee
- Grand Traverse County Parks and Recreation Network
- Grand Vision
- Grand Vision Networks
- Michigan MSO Network Partners
- Regional Convening of Networks (RECON)
- Shape Up North Advisory Committee
- Teen Pregnancy Prevention Network



ROTARY CHARITIES: GRANTS

Over the last 35 years, Rotary Charities has granted over \$58 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.



These grantees working with NorthSky reported twice the number of outcomes than those grantees who did not



TOTAL GRANTS: \$1,029,933

GRANTS BY TYPE

CAPITAL \$340,000	CAPACITY BUILDING \$330,213	PROGRAM \$188,000	PLANNING \$171,720
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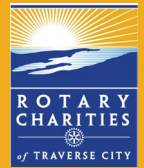
CAPITAL GRANTS (13 GRANTS)

Organization	Amount	Purpose
Area Seniors of Bellaire	\$5,000	Pickleball court
Conservation Resource Alliance	\$25,000	Boardman River crossing on Cass Rd.
Downtown Development Aut.	\$25,000	Public art
Elmwood Township	\$20,000	M-22 corridor traffic study
Grace Episcopal Church	\$20,000	Jubilee House renovation
HomeStretch / Habitat	\$40,000	Energy-efficient affordable housing
Interlochen Center for the Arts	\$35,000	Technology upgrades for Interlochen Public Radio
Leelanau Conservancy	\$30,000	Farmland preservation
Michigan Legacy Art Park	\$40,000	Barrier-free trail construction
Mt. Holiday	\$10,000	Zipline course
Northwestern Michigan Fair	\$15,000	New horse barn
Peter Dougherty Society	\$15,000	Dougherty House restoration
TART Trails	\$50,000	Phase II of Sleeping Bear Heritage Trail
Yuba Historical Museum	\$10,000	HVAC system and plumbing

CAPACITY GRANTS (13 GRANTS)

Organization	Amount	Purpose
American Red Cross	\$15,000	Fund development and outreach
Benzie Area Christian Neighbors	\$11,352	Sustainability and fund development
Benzie Home Health Care	\$29,850	Marketing and technical capacity
Botanic Garden Society	\$30,000	Fund development and board assistance
Child and Family Services	\$40,000	Merger with Third Level
GT Community Foundation	\$28,450	Communications / community relations
Disability Network	\$37,500	Fund development
Junior Achievement	\$5,000	Community outreach and marketing
Music House Museum	\$15,000	Technology upgrade and outreach
N. Mi. Community Action Agency	\$40,000	Fund development
N. Michigan Supportive Housing	\$30,000	ED leadership / fund development
SEEDS	\$35,000	Development officer and business plan
Women's Resource Center	\$13,061	Board, fund, volunteer development

ROTARY CHARITIES: GRANTS



PROGRAM GRANTS (7 GRANTS)

Organization	Amount	Purpose
Area Agency on Aging	\$10,000	Aging and Disability Resource Collaborative
Bethany Christian Services	\$25,000	Safe Families for Children program
GT Regional Community Fdn	\$13,000	Rotary Fund matching grants
Lakes to Land Regional Initiative	\$35,000	Collaborative master plans
Rotary Camps & Services	\$30,000	Discovery Center ~ Great Lakes
Mich. Land Use Institute	\$25,000	Taste the Local Difference
The Nature Conservancy	\$25,000	Invasive species management
Traverse Health Clinic	\$25,000	New physician

PLANNING GRANTS (30 GRANTS)

Organization	Amount	Purpose
Acme Heritage Society	\$5,000	Needs assessment / fundraising feasibility study
Artists Creating Together	\$5,000	Marketing tool kit
BATA	\$5,000	Strategic plan development
Benzie Area Historical Society	\$8,000	OCA*
Benzie Council on Aging	\$5,000	Community needs assessment
Benzie County	\$5,000	Economic development plan
Benzie Sunrise Rotary Foundation	\$5,000	Food security program
Bethany Christian Services	\$5,000	Shared Family Care
Catholic Human Services	\$8,000	OCA*
Chalfonte Foundation	\$8,000	OCA*
Community Services Network	\$8,000	OCA*
FLOW For Water	\$8,000	OCA*
Grass River Natural Area	\$5,000	Board and fund development plan
Great Lakes Children's Museum	\$3,920	Salesforce transition
Greenspire School	\$8,000	OCA*
GT Regional Land Conservancy	\$5,000	Economic impact model
Inland Seas Education Association	\$5,000	New program development
ISLAND	\$8,000	OCA*
Kalkaska Conservation District	\$8,000	OCA*
Leelanau Christian Neighbors	\$5,000	Marketing design
Leelanau Conservancy	\$5,000	Farmland access feasibility
Little Collaborative	\$4,800	Board development / collaboration
Northport Community Arts	\$8,000	OCA*
Rex Dobson Ruby Ellen Fdn	\$5,000	Master preservation plan
Stoneshouse	\$8,000	OCA*
The Children's House	\$8,000	OCA*
United Way	\$5,000	211 program sustainability
Women's Resource Center	\$5,000	Teen Pregnancy Prevention Network

*OCA = Organizational Capacity Assessment

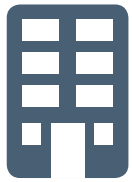


ROTARY CHARITIES: NORTHSKY



After years of working with nonprofit organizations in Washington, D.C. and throughout California, I couldn't be more delighted to return to my home state of Michigan. From my first day on the job at our training with FSG on Collective Impact, I could immediately tell this is a very special region of the state. Equally exciting is the work NorthSky is accomplishing through its programs and services: supporting community benefit organizations in the areas of leadership, management, partnerships and sustainability. From the success of our pilot Peer Learning Circle where executive directors are building collaborative relationships at a deep level, to our continued partnership with the Indiana School of Philanthropy bringing their nationally recognized courses to our region, NorthSky is leading the way in connecting Northern Michigan organizations with resources and each other. Looking forward, we will continue to innovate and leverage resources for the sector and for our communities.

— Joe Liszewski, Program Director for NorthSky Nonprofit Network



**MORE THAN
350**
ORGANIZATIONS
RECEIVED SERVICES

96%
OF ORGANIZATIONS
WERE FROM THE
10-COUNTY AREA

45%
RECEIVED MORE
THAN ONE SERVICE

PROFESSIONAL DEVELOPMENT SERIES



OVER 750
TOTAL ATTENDEES



OVER 250
ORGANIZATIONS

"The Break for Lunch series is a good idea. Excellent quality for this format."

—Workshop attendee

"The speakers have great energy, and the content was specific and useful."

—Workshop attendee

29%
ATTENDED MORE
THAN ONE WORKSHOP

88%
WERE VERY SATISFIED WITH THE
WORKSHOP THEY ATTENDED

FEE-BASED CONSULTING



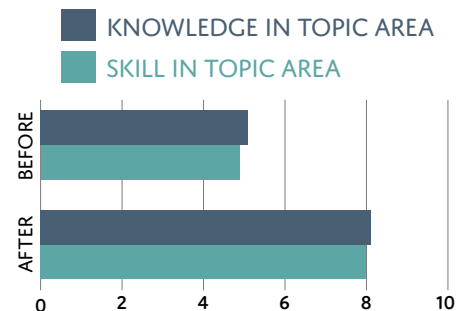
71 ORGANIZATIONS



3,394
CONSULTING HOURS

"After working with our NorthSky consultant, we can see more clearly the needs of our organization and in what direction we need to go to address those needs."

—NorthSky client



FREE COUNSELING



39 ORGANIZATIONS



100+
CONSULTING HOURS

"Very helpful to have experienced consultants, available for face-to-face and phone contact."

—Free counseling client

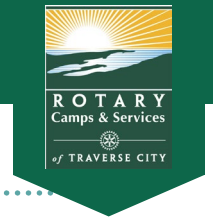
"NorthSky is extremely generous with their time and wisdom."

—Free counseling client

MISSION NorthSky's mission is to build strong communities by helping nonprofit organizations achieve and sustain excellence.

NorthSky Nonprofit Network is the nonprofit management support program of Rotary Charities of Traverse City, created to assist Northern Michigan nonprofits in strengthening their capabilities through capacity building and sustainability support.

CAMPS & SERVICES



As Chairperson for Rotary Camps & Services for the past three years, I have learned a great deal about this often quiet Rotary organization. Formed in 1923 as the land holding arm of the club, Rotary Camps & Services predates Rotary Charities by over 50 years. We were originally formed when the Club purchased the property known as Camp Greilick for the Boy Scouts. Fast forward to 2014: we now own over 1,700 acres in Grand Traverse and Leelanau Counties. Stewardship of natural resources and access to recreation form the basis of Camps & Services. Camps & Services delivers on its mission by convening the directors of regional camps and creating sustainable forestry plans for our properties. We actively partner with other organizations to ensure our properties are well managed. We get our hands dirty at work bees on our properties and in the Boardman River watershed. Whatever the activity, our work relates to stewarding natural resources and creating access to recreational opportunities.

— John Hall, Chairperson of the Camps & Services Board



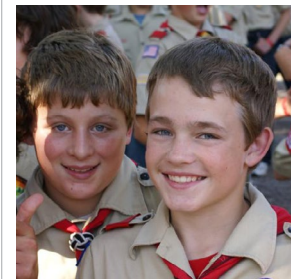
CAMP SAKAKAWEA 564.5 acres

Camp Sakakawea is operated by Girl Scouts of Michigan Shore to Shore. The property contains wildlife, forest, marshland and a picturesque waterfront. A trust partnership and long-term lease between Rotary and Girl Scouts has been in effect since 1955, with Rotary Camps & Services serving as the property owner. In an effort to preserve its natural beauty, Rotary Camps & Services and the Grand Traverse Regional Land Conservancy placed a permanent conservation easement on Camp Saki in 2004.



DISCOVERY CENTER GREAT LAKES 9 acres

The Discovery Center includes the Great Lakes Children's Museum, The Watershed Center, Maritime Heritage Alliance and Traverse Area Community Sailing.

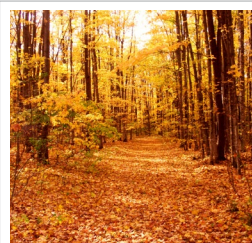


CAMP GREILICK 496 acres

Camp Greilick is home to the Michigan Crossroads Council of Boy Scouts of America summer camp. Nestled between Spider, Bass, and Rennie Lakes, the Boy Scouts have used the camp since 1923.

CANTERBURY WOODS 120 acres

Canterbury Woods



EAST CREEK RESERVE 556 acres

East Creek Reserve was donated to Camps & Services in 1993 by the Edwards family. It is managed for public use by the Grand Traverse Conservation District and open for non-motorized recreation and hunting.

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.

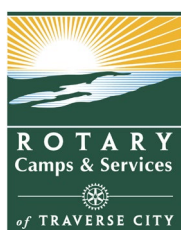
VISION Rotary Charities and Rotary Camps & Services will be the collaborative leaders of strategic efforts to achieve positive change in the five-county Grand Traverse region.

FINANCIAL REPORTS

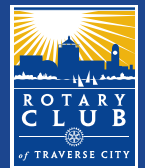


ROTARY CHARITIES	2014	2013
NET ASSETS, BEGINNING OF YEAR	\$42,573,082	\$40,189,648
REVENUES AND GAINS		
Dividends and Interest	919,326	922,972
NorthSky Services	292,944	244,127
Oil and Gas Royalty Income	299,201	331,975
Net Realized and Unrealized Gain (Loss)	5,994,328	3,376,943
Grants and Other	51,094	67,368
TOTAL REVENUE AND GAINS	7,556,893	4,943,385
OPERATING EXPENSES AND GRANTS		
Program Services		
Grants*	1,231,120	1,752,400
NorthSky	416,816	415,547
Management and General	420,589	392,004
TOTAL OPERATING EXPENSES AND GRANTS	2,068,525	2,559,951
Change in Unrestricted Net Assets	5,488,107	2,365,962
Change in Temporary Restricted Net Assets	261	17,472
Change in Net Assets	5,488,368	2,383,434
UNRESTRICTED NET ASSETS: END OF YEAR	48,043,717	42,555,610
TEMPORARY RESTRICTED NET ASSETS: END OF YEAR	17,733	17,472
TOTAL NET ASSETS: END OF YEAR	\$48,061,450	\$42,573,082

*Includes payments on multiple year grants previously reported.



ROTARY CAMPS & SERVICES	2014	2013
NET ASSETS, BEGINNING OF YEAR	\$2,991,542	\$2,867,973
REVENUES AND GAINS		
Dividends and Interest	31,419	25,550
Oil and Gas Royalty Income	36,223	16,630
Net Realized and Unrealized Gain (Loss)	(6,650)	131,294
Grants	49,575	-
Contributions	50,903	60,410
TOTAL REVENUE AND GAINS	161,470	233,884
OPERATING EXPENSES AND GRANTS		
Program Services		
Grants	53,945	60,644
Administrative and General	73,292	49,671
TOTAL OPERATING EXPENSES AND GRANTS	127,237	110,315
Change in Unrestricted Net Assets	6,899	113,346
Change in Temporary Restricted Net Assets	27,334	10,223
Change in Net Assets	34,233	123,569
UNRESTRICTED NET ASSETS: END OF YEAR	2,938,309	2,931,410
TEMPORARY RESTRICTED NET ASSETS: END OF YEAR	87,466	60,132
TOTAL NET ASSETS: END OF YEAR	\$3,025,775	\$2,991,542



The Rotary Club of Traverse City was chartered in 1920 and became active in the events and organizations that would shape the region. We currently have over 250 members in our Rotary Club and are part of Rotary International, a service club association that includes membership of 1.2 million in nearly 200 countries. The Rotary Club of Traverse City is among the largest in Michigan. Also known as the Noon Club, our club is committed to serving people in our community, our region, and the world. Our springtime Rotary Show has become a "rite of spring" event and raises money for a wide range of community service needs. Above all, it's the camaraderie of our Club that makes it special. We sing, we laugh, and we believe in "Service Above Self." Come join us at noon every Tuesday at the Park Place in downtown Traverse City.

— Jeff Hickman, President of the Rotary Noon Club

TOTAL DONATED FUNDS: \$140,597

YOUTH PROGRAMS: DONATED FUNDS



ROTARIANS IN OUR COMMUNITY

Volunteer projects supported by members of the Rotary Club include:

NMC BARBEQUE

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

ONE WAY COAT DAY

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

CHRISTMAS BASKETS

These donations provide holiday gifts and food for more than 20 area families in need.

SALVATION ARMY BELL RINGING

Helping those in need during the holiday season.

ROTARY SHOW

A 72-year tradition, this annual vaudeville-style show raises monies for Rotary Good Works community grants every spring.

GOOD WORKS GRANTS (ROTARY SHOW PROCEEDS)

\$31,460

GRANTS SUPPORTING DISABLED AND HANDICAPPED (TAG DAY PROCEEDS)

\$25,032

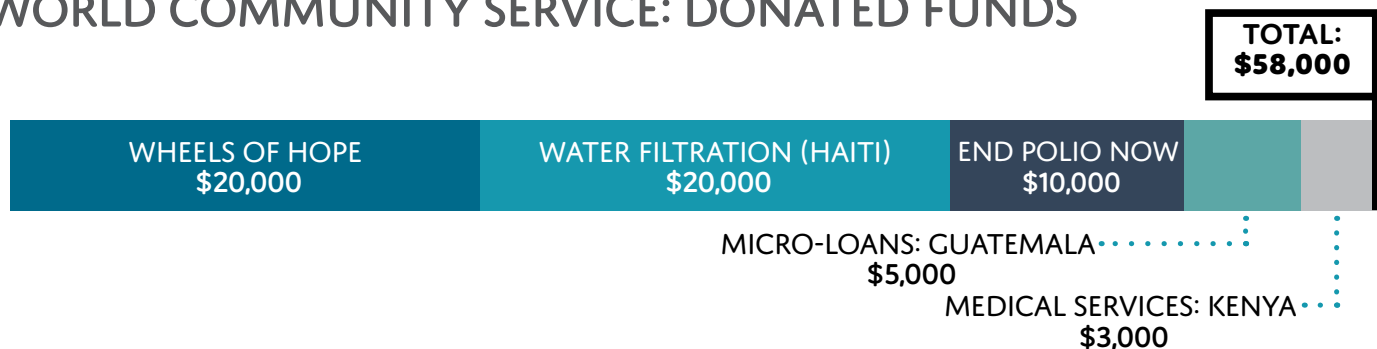
BOARDMAN RIVER (GAME DINNER PROCEEDS)

\$12,500

CHRISTMAS BASKETS

\$6,530

WORLD COMMUNITY SERVICE: DONATED FUNDS



A YEAR IN REVIEW

JUL
13

••• The performance-based mortgage for the State Theatre is burned by the Traverse City Film Festival after exceeding grant conditions.



AUG
13

••• Rotary Charities organizational study results in the creation of a leadership team.

SEPT
13

••• Thirty-fifth annual meeting of the Club membership is held and trustees elected.

OCT
13

••• Second annual Rotary Charities and Rotary Camps & Services current and past trustees meeting is attended by over 25 trustees.

NOV
13

••• \$500,000 Rotary Charities grant is given to the new Cowell Family Cancer Center at Munson Medical Center.

DEC
13

••• Rotary Charities awards over \$590,000 in grants to 22 regional organizations.

••••• NorthSky facilitates merger between Third Level Crisis Center and Child and Family Services.

JAN
14

••• NorthSky pilots Executive Director Peer Learning Circle.

FEB
14



••• NorthSky hosts David Phillips from FSG for an educational series on Collective Impact, with over 150 community members in attendance.

MAR
14

••• Over 100 people come to hear Paul Born from the Tamarack Institute provide expert guidance on achieving social change through networks.



APR
14



••• The 72nd Annual Rotary Show raises over \$31,000 for community grants and over 1,300 people attend.

MAY
14

••• Rotary Charities awards \$210,000 in grants to 11 organizations.

JUN
14

••• John Hewko, General Secretary of Rotary International, visits with Noon Club and Rotary Charities board.



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

Mo Stych
Rotary Charities Program Associate

Sally Erickson
Rotary Noon Club Administrator

ROTARY CHARITIES BOARD

Al Bonney, *Chair*

Gregg Smith, *Vice-Chair*

Mack Beers, *Treasurer*

Allison Beers

Marlene Bevan

Beth Karczewski

Sid Lammers

George Powell

John Racine

Elaine Wood

CAMPS + SERVICES BOARD

John Hall, *Chair*

Dave Millross, *Vice-Chair*

Al Olson, *Secretary/Treasurer*

Chuck Downey

Rob Lovell

Doug Meteyer

Phil Rosi

Paul Schmuckal

Sharron Zimmerman

CLUB BOARD

Jeff Hickman, *Chair*

George Powell, *Vice-Chair*

Al Olson, *Secretary/Treasurer*

Chuck Downey

John Hall

Chris Peregrine

Steve Alexander

Allison Beers

Marsha Minervini

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TRAVERSECITYROTARY.ORG
NORTHSKYNONPROFITNETWORK.ORG