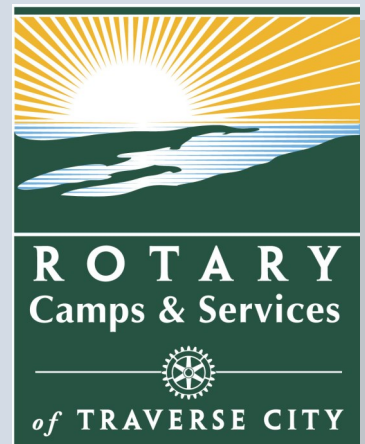
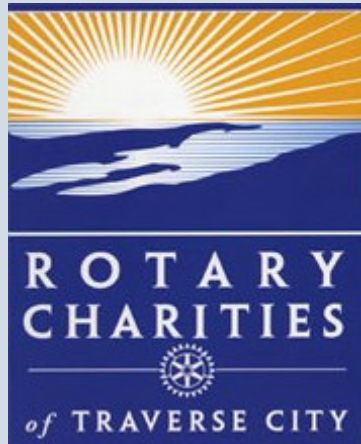


Annual Report

2012 - 2013



Annual Report 2012 2013

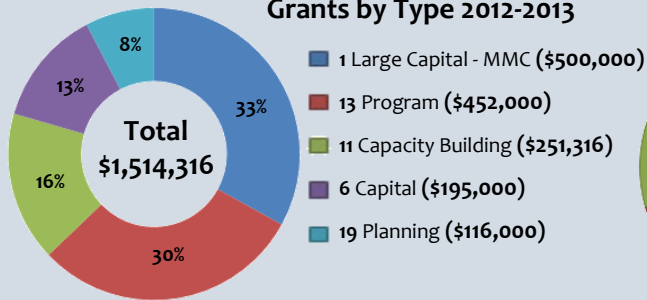
Vision: Rotary Charities and Rotary Camps & Services will be the collaborative leaders of strategic efforts to achieve positive change in our five-county region.

Mission: Rotary Charities leads positive change in the region by assisting community organizations to better achieve their missions. We do this by:

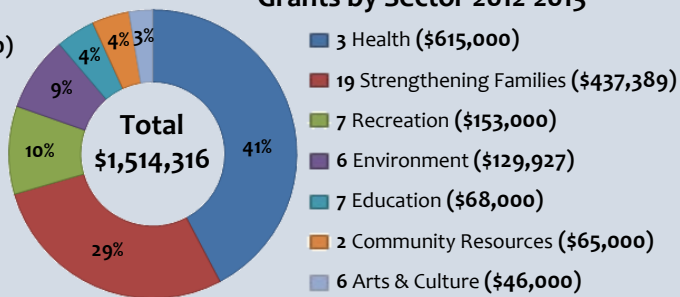


Providing grants and resources, providing leadership and facilitating partnerships, promoting philanthropy, providing a management support program for the nonprofit sector, and operating an efficient and effective organization.

Grants by Type 2012-2013



Grants by Sector 2012-2013



Providing Grants and Resources

Providing Leadership & Facilitating Partnerships

Leadership, Partnerships & Collaboration



Michigan Land Use Funders

The Great Lakes Funder Collaboration



AmeriCorps VISTA Project

02/26/2012 to 03/09/2013



8 AmeriCorps VISTA Members

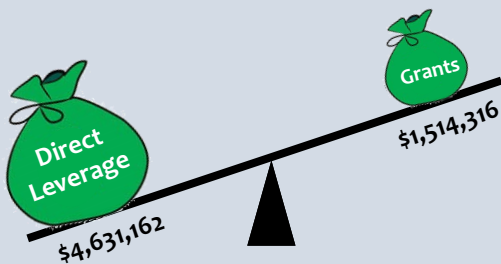


\$30,700 in Cash Resources Developed by VISTAs
\$184,803 in Non-Cash Resources Developed by VISTAs



Worked with 3795 Community Volunteers
Community Volunteers Served 74,463 Hours

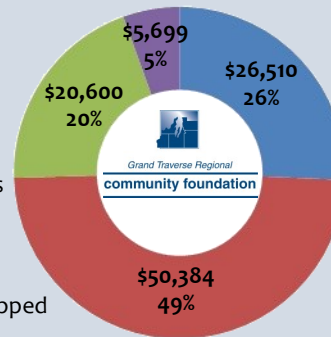
Direct Leverage Reported by Grantees



Rotary Fund

The Grand Traverse Regional Community Foundation

- Club Challenge Grants (9 Regional Rotary Clubs)
- Individual Rotarian Matches (10 Clubs)
- World Community Service (TC Noon)
- Committee for the Handicapped (TC Noon)



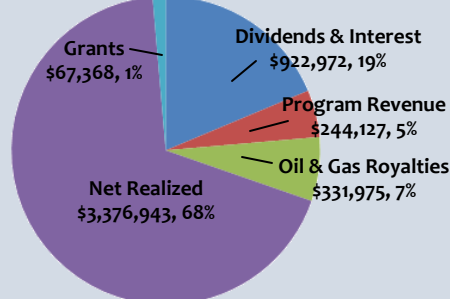
Promoting Philanthropy

Operating an Efficient & Effective Organization

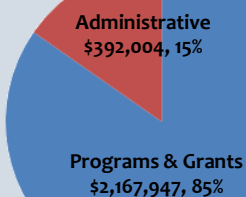
5 Year Portfolio Growth



Revenue



Expenses





NorthSky's Mission: to build strong communities by helping nonprofit organizations achieve and sustain excellence.




Providing a Management Support Program for the Nonprofit Sector


NorthSky Primary Services

 **380** Organizations Served

 **4,042** People Reached

 **5,605** Hours of Consulting

 **386** Hours of Free Business Counseling

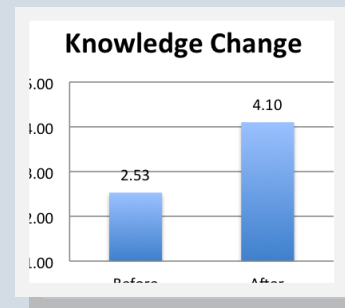
 **503** Free Online Resources

 **44** Professional Development Workshops

Reported Outcomes

Professional Development Series

Participants agree or strongly agree that they will be able to use what they learned to better serve their organization (avg. 4.4/5) and plan to use the knowledge a "great deal" (4.5/5).



Fee-Based Consulting

90% of clients reported that they were better able to meet their mission as a result of the engagement (60%) or expect to be able to within 12 months (30%).

80% of clients reported that their engagement increased organizational sustainability (45%) or they expect it to within the next 12 months (35%).



Free Counseling

71% of clients reported that they expect to be able to better meet their mission within 12 months.

43% of clients reported that counseling increased their sustainability (14%) or they expect it to within 12 months (29%)



Rotary Charities Grantees



+

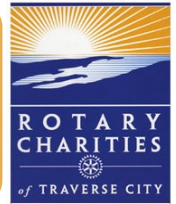


Grantees who worked with NorthSky:

- Were nearly **2X** as likely to say their grant had a great impact on their ability to meet their mission.
- Were **3X** as likely to say their grant increased their sustainability to a great extent.
- Reported **2X** the number of outcomes as a result of their grant.
- Were more likely to report indirect leverage, but less likely to report direct leverage.

Grants Awarded

July 1, 2012 - June 30, 2013



Program/Name	Title	Grant
Acme Christian Thrift Store & Food Pantry	Capital Improvements & Furnishings	\$35,000
Alliance for Economic Success	Honor Revitalization Project	\$15,000
American Red Cross of Northwest Michigan	Fund Development	\$25,000
Antrim Conservation District	Organizational Capacity Building	\$11,927
ArtCenter Traverse City	Planning - Survey & Business Plan Development	\$5,000
Benzie Area Christian Neighbors	Organizational Capacity Building	\$22,705
Benzie Conservation District	Planning	\$5,000
Benzie Transportation Authority	Smart Ride	\$16,000
Bethany Christian Services	Safe Families for Children	\$40,000
Child and Family Services of NW Michigan	Safe Haven - Expansion to Antrim County	\$49,000
City of Traverse City	Feasibility Study - Bayfront Pier	\$5,000
Communities in Schools of Mancelona	Organizational Capacity Building	\$25,000
Conflict Resolution Services	-Planning- Beyond Bullying	\$5,000
	-Olweus Bullying Prevention Program	\$65,000
Foundation for Mental Health	Organizational Capacity Building	\$40,000
Grand Traverse County Parks and Rec	Planning Facility Needs Study	\$5,000
Grand Traverse Pavilions Foundation	Expansion Feasibility Study	\$5,000
Grand Traverse Regional Community Foundation	- Organizational Capacity Building	\$40,000
	-Herman Community Park	\$15,000
Grand Traverse Regional Land Conservancy	Acme Bayside Park, Phase 3	\$50,000
Grass River Natural Area, inc.	Planning- Organizational Capacity Assessment	\$8,000
Great Start Traverse Bay/Manistee	Planning Grant- Network	\$5,000
Green Lake Township	Interlochen Recreation Trail	\$15,000
Historic Elk Rapids Town Hall Association	Planning- Design Project	\$5,000
History Center of Traverse City	Planning- Organizational Capacity Assessment	\$8,000
Inland Seas Education Association	Planning- Executive Transition	\$5,000
Involved Citizen Enterprises (ICE)	Centre ICE Arena Renovation	\$65,000
ISLAND	Planning Farmer Residency Program	\$5,000
Junior Achievement	Marketing and Communications (year 2)	\$13,500
Leelanau Children's Center	Planning: Strategic Relocation Project	\$5,000
	-Parenting Communities (year 3)	\$12,000
Leelanau Christian Neighbors	Planning- Organizational Capacity Assessment	\$8,000
Leelanau Montessori PSA	Planning- Strategic Planning Initiative	\$8,000
Munson Healthcare Regional Foundation	Cowell Family Cancer Center	\$500,000
Music House Museum	Planning- Capacity Building	\$8,000
Northport Youth Sailing School	Planning- Organizational Capacity Assessment	\$8,000
NW Michigan Community Action Agency	Planning- NMCAA Development	\$8,000
NW Michigan Council of Governments	Up North Trails	\$40,000
Paperworks Studio (a Goodwill Program)	Program (year 3)	\$20,000
ReadAloud.org	Parent Awareness & Big Box of Books	\$15,000
Samels Farm Historical Society	Farm Implement/Storage Project	\$15,000
SEEDS	Fund Development	\$40,000
Third Level	-Financial Planning	\$5,000
	-Organizational Analysis	\$5,000
Traverse Bay Children's Advocacy Center	Program Grant- f/t Family Advocate (year 3)	\$25,000
Traverse City Film Festival	Bijou by the Bay Planning Grant	\$5,000
Traverse Health Clinic	Program Transition & Expansion	\$90,000
United Way of Northwest Michigan	2-1-1 Partnership	\$40,000
	Volunteer Center (year 2)	\$25,000
Women's Resource Center- Grand Traverse	Alliances & Technology	\$23,184
TOTAL GRANTS.....		\$1,514,316

Rotary Charities Financial Report

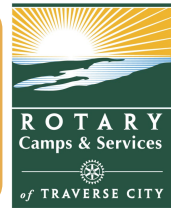
July 1, 2012 - June 30, 2013



	<u>2013</u>	<u>2012</u>
Net Assets, Beginning of Year	\$ 40,189,648	\$ 42,684,392
Revenues and Gains		
Dividends and Interest	922,972	1,180,567
NorthSky - Consulting Fees	244,127	394,276
Oil and Gas Royalty Income	331,975	388,097
Net Realized and Unrealized Gain (Loss)	3,376,943	(1,789,353)
Grants and Other	67,368	196,182
Total Revenue and Gains	4,943,385	369,769
Operating Expenses and Grants		
Program Services		
Grants	1,752,400	2,037,366
NorthSky	415,547	394,468
Management and General	392,004	432,679
Total Operating Expenses and Grants	2,559,951	2,864,513
Change in Unrestricted Net Assets	2,365,962	(2,494,744)
Change in Temporary Restricted Net Assets	17,472	-
Change in Net Assets	2,383,434	(2,494,744)
Unrestricted Net Assets End of Year	42,555,610	40,189,648
Temporary Restricted Net Assets End of Year	17,472	-
Total Net Assets End of Year	\$ 42,573,082	\$ 40,189,648

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

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.



Rotary Camps & Services Activities



8th Annual Kids Free Fishing Day



8th Annual Kids Free Fishing Day



8th Annual Kids Free Fishing Day



East Creek Workbee

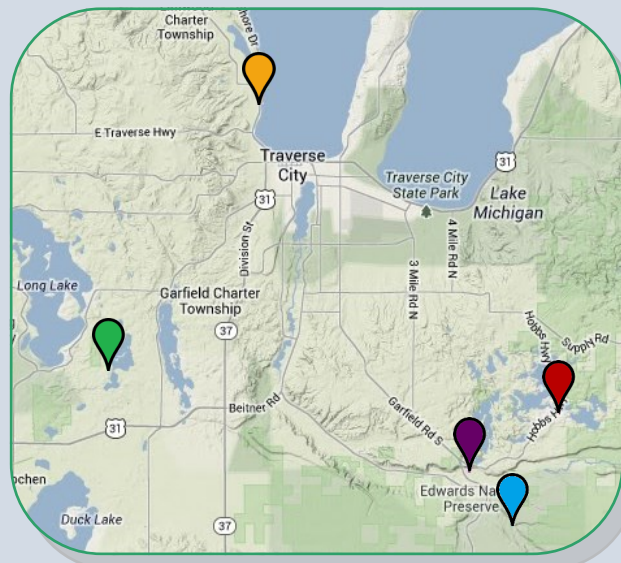


Boardman Restoration Workbee



Boardman Restoration Workbee

Rotary Camps & Services Properties



Property Partners



Girl Scouts.



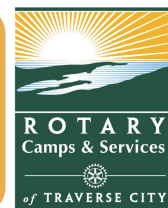
MARITIME HERITAGE ALLIANCE

Where History Sets Sail

- Camp Greilick: 496 Acres**, Scenic Trails Council Boy Scouts of America
- Camp Sakakawea: 564.5 Acres**, Girls Scouts of Michigan Shore to Shore Council
- East Creek: 556 Acres**, Open for Non-Motorized Recreation
- Canterbury Woods: 120 Acres**
- Discovery Center Great Lakes: 9 Acres**, Great Lakes Children's Museum, the Watershed Center, the Maritime Heritage Alliance, Traverse Area Community Sailing

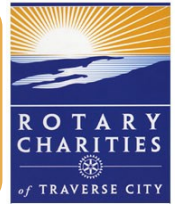
Rotary Camps & Services Financial Report

July 1, 2012 - June 30, 2013



	<u>2013</u>	<u>2012</u>
Net Assets, Beginning of Year	\$ 2,867,973	\$ 2,867,401
Revenues and Gains		
Dividends and Interest	25,550	23,370
Oil and Gas Royalty Income	16,630	28,232
Net Realized and Unrealized Gain (Loss)	131,294	(6,986)
Contributions	61,410	47,968
Total Revenue and Gains	234,884	92,584
Operating Expenses and Grants		
Program Services		
Grants	63,364	43,162
Administrative and General	47,951	48,850
Total Operating Expenses and Grants	111,315	92,012
Change in Unrestricted Net Assets	113,346	10,779
Change in Temporary Restricted Net Assets	10,223	(10,207)
Change in Net Assets	123,569	572
Unrestricted Net Assets End of Year	2,931,410	2,818,064
Temporary Restricted Net Assets End of Year	60,132	49,909
Total Net Assets End of Year	\$ 2,991,542	\$ 2,867,973

Contact Information



Rotary Charities Board 2012 - 2013

Al Bonney, Chair
Gregg Smith, Vice Chair
George Powell, Treasurer

Mack Beers
Bryan Crough (deceased)
Jeff Hickman
Sid Lammers
John Racine
Elaine Wood
Beth Karczewski

Camps & Services Board 2012 - 2013

John Hall, Chair
Dave Millross, Vice Chair
Al Olson, Secretary/Treasurer

Chuck Downey
Rob Lovell
Doug Meteyer
Lee Olewinski
Phil Rosi
Paul Schmuckal
Bob Witkop

Staff

Marsha Smith, Executive Director
Becky Ewing, Program Officer
Stacey Foster, Office Manager
Debbie McKeon, NorthSky Executive Director (former)
Freya Bradford, NorthSky Interim Director (current)

Contact Information

202 E. Grandview Parkway, Suite 200
Traverse City, MI 49684

www.rotarycharities.org
info@rotarycharities.org

Phone: (231) 941-4010
Fax: (231) 941-4066

Our Values

- We practice Truth; Fairness; Goodwill and Mutual Benefit-the 4 Way Test of Rotary International.
- We are primarily of service to our regional community.
- We respect a diversity of opinions and perspectives.
- We promote innovation and cooperation in order to improve the quality of life.

Our Guiding Principles

- We are Rotarians; this drives our values, our services, and our skills.
- We always act on behalf of the greater good.
- Our resources are a gift; it is our responsibility to wisely allocate them.
- We leverage our resources to stretch our impact and dollars further.
- We are a catalyst for positive change - not necessarily the agent for change.
- Helping people help themselves is the most efficient way to make change.