

ROTARY
CHARITIES

Resources for change.

**STRENGTHENED
BY TRUST**

**2020
2021**
ANNUAL REPORT





REFLECTIONS FROM HERE...

As I look over the past year with all its disruptions and lessons, I unearth the things we all share: that we are capable of learning, surviving, working toward the common good.

We came together from diverse perspectives to care for one another, work together, and find new ways of addressing the challenges our communities face.

Driven by the desire to do the most good with what we have, we are guided by our core values and the principles of trust-based philanthropy. As funders, we have challenged ourselves to address inequities and unintended consequences that may result from the way we fund by building relationships with grantees and partners, soliciting and acting on their feedback, and offering support beyond cutting a check.

These strong relationships have opened channels of honest communication, allowing us to support grantees through complex challenges. Much of that support is wrapped up in not having all the answers but our willingness to listen. As one of my favorite thought leaders, Mark Nepo, says, "To listen is to lean in softly with a willingness to be changed by what we hear."

I am personally grateful for the dedicated, competent, and caring people I have come to know over the past 14 years through this work. It has been the opportunity of a lifetime, and my heart is full of hope for the future.

Becky Ewing, Executive Director, retired June 2021

(See the last page for a letter from Sakura Takano, Chief Executive Officer and Jeff Hickman, Chairperson, Board of Trustees.)

Cover photo by Gary Howe: FY20-21 grantee Traverse City Dance Project, performing on the stage of the Moving Theater, event co-hosted by grantee Crosshatch Center for Arts & Ecology.

61
GRANTS

51
GRANTEE ORGANIZATIONS

\$1,184,213
TOTAL GRANTS AWARDED

\$1,750,000
IMPACT INVESTMENTS HELD

\$109,120
INVESTED IN NONPROFIT CAPACITY BUILDING SERVICES

13
COMMUNITY ASSETS FUNDED

3
SYSTEMS CHANGE INITIATIVES FUNDED

OUR MISSION

Working in partnership with changemakers, Rotary Charities provides funding, learning, and connections to address our region's complex problems and create community assets for all.

51
LEADERSHIP LEARNING LAB PARTICIPANTS

CRISIS SUPPORT CONSULTATIONS:

136
HOURS

67
PARTICIPANTS

64
ORGANIZATIONS

LEARNING FUND:
\$21,218

AWARDED TO
16
ORGANIZATIONS



WE ENVISION COMMUNITIES THAT ARE ADAPTIVE & THRIVING FOR EVERYONE.

Globally, foundations are being challenged to think differently about how they operate, fund, and serve their communities. Rotary Charities of Traverse City heard this call early on in the pandemic. And, through the trusting relationships that we have built over time, community leaders and grantees have shared with us what support they need to continue delivering their programming and achieving their vision. We are invested in the work of our grantees and are committed to providing the funding, learning, and connections that changemakers need to be successful in meeting the needs of our region.

FUNDING

Building flexibility into our strategies enabled us to adapt and respond to the changing needs of regional nonprofits. In FY 20-21, we granted nearly \$50,000 to four organizations for the specific purpose of adapting to new realities brought about by the COVID-19 pandemic. To accommodate our existing grantees, we offered flexibility in the use of grant funds and extended activity and reporting timelines. In collaboration with our philanthropic partners, we creatively leveraged resources to meet emerging needs in our communities.

LEARNING

We supported changemakers' learning and growth by hosting several professional development workshops focused on helping organizations work better together. Our staff also curated resources, webinars, and virtual learning opportunities offered by national and international organizations and invited subject matter experts to attend our Community of Practice virtual meetings.

CONNECTING

In partnership with regional community foundations, we connected leaders from 64 organizations to a talented team of professionals, providing 136 hours of consultation to nonprofits in Antrim, Benzie, Emmet, Grand Traverse, Kalkaska, Leelanau, and Manistee counties. We are helping communities and their leaders as they continue to adapt, shifting our focus from crisis support to recovery and resilience.

We saw the value of leveraging our networks to lift our grantees' voices and share their stories with our audiences, creating shareable assets and demonstrating the meaningful change and lasting impact their work has on communities in Northern Michigan.

WATCH OUR
SPRING 2021
GRANTEE
HIGHLIGHTS:



“On behalf of our board, staff, and families we serve at Michael’s Place, I am overwhelmed with gratitude for your profound compassion, leadership and guidance, and willingness to see the changing world and the current needs of regional nonprofits. Throughout the pandemic, I have continued to feel like we can count on Rotary Charities.”

-Mindy Buell, Executive Director/CEO, Michael’s Place



WE APPROACH OUR WORK WITH HUMILITY, EMPATHY, & CURIOSITY, INVITING DIVERSE PERSPECTIVES & IDEAS.

LEADERSHIP LEARNING LAB

The Leadership Learning Lab (LLL) was established in 2018 by a funder collaborative including the Frey Foundation, ten northern Michigan Community Foundations, and Rotary Charities of Traverse City. The program curriculum combines adaptive leadership, time management, and a suite of nonprofit and cross-sector capacity-building skills. Leaders created a network of support for each other to strengthen their organizations and the communities they serve.

With an unexpected pivot to virtual learning, our 2020-2021 LLL cohorts adapted to a new way of learning and connecting. Would the magic of the LLL translate in a virtual environment? Thanks to a talented team of facilitators who flexed their own skills, this year's graduates not only grew, but flourished.

READ MORE ABOUT THE 2020-2021 LEADERSHIP LEARNING LAB:



“Adaptive, smart, and inclusive leadership is challenging under normal circumstances. Participating in the LLL during unprecedented uncertainty helped me slow down and explore the hard questions: What is my authentic leadership style? How can I improve my communication skills and better navigate conflict? How can I be a better partner among stakeholders with a shared collective vision? The teachings, readings, and reflections with our instructors and peers explored these core questions, and I am very grateful for such a rich experience that will deepen my life-long work of community service.”

-Liz Kirkwood, Executive Director, For Love of Water (FLOW)

LEADERSHIP COACHING

Rotary Charities has offered Adaptive Leadership Coaching since 2010 to provide leaders a reflective, trusted space to explore their capacity to meet new challenges both personally and professionally.

Lucille Chrisman, CPCC, worked one-on-one with ten local leaders as she guided them through an eight-month coaching journey to discover their personal leadership style, strengths, opportunities for growth, and practical tools and strategies for leading.

TOP OUTCOMES REPORTED BY ADAPTIVE LEADERSHIP COACHING PARTICIPANTS INCLUDE:

- + Awareness of their leadership style
- + Increased awareness of their strengths as a leader
- + Improved confidence as a leader
- + Improved ability to communicate effectively

PROFESSIONAL DEVELOPMENT & CAPACITY BUILDING

In light of the pandemic, Rotary Charities shifted the focus of learning offerings to helping organizations work better together. Three hundred thirty-two participants attended eight programs focusing on Collaboration, Systems Practice, Crisis Management, and Adaptive Leadership.

Additionally, we promoted the content of other regional and national organizations, which have become more accessible, low-cost, and virtual. These curated opportunities focus mainly on the topics of Adaptive Leadership & Collaboration, Equity & Inclusion, Operations & Technical Assistance, and Systems Change, and continue to be featured in weekly email newsletters and on our website.

LEARNING FUND

Established in 2020, the Learning Fund supports local changemakers' continued learning and growth by providing funding to cover tuition and fees for experiences and conferences broadly aligned with Rotary Charities' mission, vision, and guiding principles. In FY 20-21, we awarded a total of \$21,218 to 16 organizations.

SEE WHAT EXPERIENCES OUR LEARNING FUND HAS SUPPORTED:



“Often, we rely on our natural abilities to guide us in leadership, collaboration, and time management. But like anyone who truly excels in their craft knows, it takes practice. The Leadership Learning Lab offered me the opportunity to take a step back, self-evaluate, and practice being the best version of myself at the office, in my volunteer work, and at home.”

-Rob Marsh, Cherryland Electric Cooperative

“Receiving a Learning Fund grant allowed me to attend an international conference that offered me the opportunity to hear about best practices in fund and donor development. My organization would not have been able to budget the full cost of this event. The takeaways will help me guide my organization to a stronger and more diverse revenue base.”

-Mary Jo Zazueta, Traverse Bay Children's Advocacy Center

WE OPERATE IN TRUSTING PARTNERSHIPS WITH OPENNESS & A WILLINGNESS TO BE CHANGED.

Our Systems Change Accelerator grants support collaborative initiatives that target upstream causes of complex community problems. Since 2018, over \$1.1 million has been invested in eight initiatives. In FY 20-21, \$325,000 was awarded to three Systems Change Accelerator grantees addressing issues of affordable housing, youth homelessness, and organic waste diversion.

Grantees in this category apply a problem-solving approach rooted in systems thinking principles. They convene those working on different parts of the problem and consider diverse perspectives about what might be causing the problem – things like policies, practices, the way resources are flowing, relationships, power dynamics, and mindsets. From there, they find places to intervene and re-design the way things work so that the problem improves over time for all.

THESE HIGHLY COLLABORATIVE INITIATIVES ARE:

- + Including those who have lived experience with the problem in positions of power
- + Creating new platforms and processes that connect people and organizations working to better align work and share knowledge and resources
- + Implementing a constellation of actions aimed at long-term change
- + Listening and learning continuously, sharing learning throughout a system, and regularly adapting based on what is learned

This type of approach to solve complex problems is beginning to show promise around the world, and in many ways, Rotary Charities and our grantees are on the leading edge of this work. Freya Bradford, Director of Systems Change & Learning, joined an international cohort of foundations hosted by the Forum for the Future in the United Kingdom. She is learning about what is working in other contexts and bringing new inspiration and tools back to our grantees. Others as far away as South Africa, Ireland, and Portugal have been eager to learn what we are doing here to support this way of working. While our contexts may be vastly different, we are finding that the challenges and lessons learned are similar. This mutual learning is helping to adapt and accelerate our work and contribute to the global field of systems change practice.

SYSTEMS CHANGE
ACCELERATOR
\$325,000
AWARDED

NEARLY EVERY COMMUNITY IN NORTHERN MICHIGAN IS EXPERIENCING THE EFFECTS OF HOUSING SHORTAGES & RISING HOUSING COSTS.

For low- and middle-income families, higher housing costs can mean that they may experience financial insecurity, unsafe living conditions, and homelessness. Housing shortages make it difficult for employers to attract and retain staff when they cannot afford to live within a reasonable distance to their work. And a lack of affordable housing can lead to talented, skilled professionals leaving the region for work elsewhere.

“The situation is pretty dire. We’re hopeful but concerned,” says Yarrow Brown, Executive Director of Housing North, a nonprofit organized in 2018 by a cross-sector group of regional housing partners to overcome the many challenges that stand in the way of housing solutions.

In 2020, Housing North was awarded a \$150,000 Systems Change Accelerator grant to continue momentum to address housing challenges by coordinating and facilitating communication, advocacy, and housing development capacity in our region.

Housing is a top priority in communities throughout Northern Michigan, but the solutions don’t come with a one-size-fits-all approach. To dial into the needs of each community, Housing North works with Housing Solution Practitioner Circles representing business, philanthropy, workforce development, housing agencies, and 136 units of government in the ten-county region it serves.

“The work we’re doing through this Systems Change Accelerator grant is helping communities see how we’re all part of the solutions,” says Brown. Since its inception, the organization has developed detailed strategic plans that have resulted in robust public awareness campaigns, successful advocacy for new legislation and funding rules, capacity for “Housing Ready” staff, and an innovative housing program pilot.

This work will drive durable change by creating new funding sources for housing, leveraging existing tools, and building more support for housing solutions that will enable partners to meet the region’s diverse housing needs.

“Housing North exists today because Rotary Charities was able to envision and embrace the concept of systems change: an approach to a complex problem that addresses not just its symptoms, but its roots. Housing North’s work is organized around the idea of systems change, a process that can be as slow as it is impactful. We’ve been able to make quick progress because of the capacity made possible by Rotary Charities; and are hopeful that our progress will build momentum and support from other partners.”

-Sarah Lucas, Housing North





WE BELIEVE OUR COMMUNITIES ARE MADE STRONGER THROUGH GENEROUS CONNECTIONS WHERE PEOPLE PUT SERVICE ABOVE SELF.

WE OPERATE WITH INCLUSIVITY, EQUITY, AND FAIRNESS TO UNLOCK NEW POTENTIAL FOR POSITIVE CHANGE.

Our Assets for Thriving Communities grants support initiatives that develop, strengthen, or build community assets that are available to all. This grant category is intended for projects that have done significant groundwork prior to application to engage the community, establish working relationships with stakeholders, and execute research to inform strategy. We believe that resident voice is essential in determining what is best for our communities, and prioritize funding assets that have been identified by residents to be important and improve their quality of life. We envision a region where citizens from Kalkaska to Leelanau are able to access what they need to live healthy, engaged, and connected lives.

Since the inception of this grant category in 2018, over \$1.6 million has been invested in 37 projects. In FY 20-21, \$534,750 was awarded to 13 grantees working to create community assets that support arts & culture, health & wellbeing, education, and affordable housing in Northern Michigan.

While we received fewer applications during our Fall 2020 grant cycle, as Spring arrived, we saw that changemakers were digging deep and thinking forward about ways to carry out their programs and achieve their mission. Having learned from the challenges presented to them by the pandemic, we saw grantees re-ignite their commitments toward building adaptive and thriving communities.



**ASSETS
FOR THRIVING
COMMUNITIES
\$534,750
AWARDED**



EXPANDING ACCESS TO HEALTHY FOOD:

A CHANGEMAKER + FUNDER PARTNERSHIP TO SHIFT A SYSTEM

A group of Northern Michigan nonprofits and a coalition of food pantries are working collaboratively to tackle the issue of food insecurity by going upstream to address its root causes.

Through intentional partnerships, support from Rotary Charities staff and contracted facilitators, and a \$100,000 Assets for Thriving Communities grant, Food Rescue and the members of the Northwest Food Coalition (NFC) enhanced their ability to be adaptive and respond to crisis, ultimately increasing the amount of fresh, nutritious food available to those who need it most in Northern Michigan.

THE THREE GOALS OF THE HEALTHY FOOD ACCESS HUB GRANT:

- + Improve and increase the distribution, storage, and repacking of fresh and frozen donated fruits and vegetables
- + Expand the capacity of the Northwest Food Coalition to collectively purchase fresh produce and healthy foods from local farms
- + Improve the culinary, nutritional, and food safety knowledge of food insecure individuals and pantry workers

Though they had an established relationship, Food Rescue and NFC had been addressing food insecurity independently and

had not yet engaged in the kind of deep collaborative effort proposed in their grant application. With support from Megan Motil of Parallel Solutions, a Memorandum of Understanding was established, outlining the partners' shared commitment, individual and collective roles, and decision making processes.

When the COVID-19 pandemic reached Michigan, suddenly nearly everything changed about the emergency food assistance system. The economic shutdown caused increased demand at pantries, just as panic buying left grocery store shelves bare, resulting in a supply shortage for Food Rescue and NFC pantries.

The MOU that had been created months earlier facilitated crucial decision making and enhanced capacity as the pandemic pushed partners to make adaptations to their original plans. Working nimbly, NFC gained the capability to receive cash donations, allowing them to make large purchases from local farmers and food producers. With increased capacity to store and repackage fresh and frozen food, Food Rescue and NFC were able to scale up the amount of fresh food on pantry shelves. Throughout the crisis, NFC member organizations came together to problem solve, share resources, and overcome obstacles.

"The Northwest Food Coalition, Food Rescue, and Groundwork have been becoming more engaged, and the more we can strengthen our partnerships and increase our capacity and infrastructure, the better we will be able to meet the needs of the community."

**-Taylor Moore,
Food Rescue
Manager**



**READ MORE ABOUT THEIR WORK IN
EXPANDING ACCESS TO HEALTHY FOOD:**





WE CARE MOST ABOUT LASTING IMPACT THAT REFLECTS COMMITMENT, COURAGE, CREATIVITY, & COLLABORATION.

SEED GRANTS ARE SMALL INVESTMENTS THAT OFTEN LEAD TO OUTSIZED IMPACT.

Common activities funded through Seed grants include convening partners, engaging stakeholders, determining the best ways to move forward with complex projects, creating strong partnership agreements, and piloting projects. In many cases, these activities provide clarity and a sense of direction for transformational projects and often lead to requests for funding through our Assets for Thriving Communities and Systems Change Accelerator categories.



THE ROCK OF KINGSLEY

What began as an after-school youth center has blossomed into a youth and senior community hub, event space, community shelter, and resource center, touching the lives of hundreds of students, adults, and families who visit The Rock of Kingsley. In Spring 2021, The Rock was awarded a \$50,000 Assets for Thriving Communities grant in support of their Building Preservation and Expansion project and capital campaign. Prior to this award, The Rock received a Seed grant in 2020, which provided the funding necessary to conduct a feasibility study to determine the capacity of the community to support their capital campaign. The Rock proceeded with confidence that their community would once again help the organization that has helped so many.

GET THE FULL STORY:



NEWTON'S ROAD

Newton's Road Northwest is dedicated to STEM learning, sparking "aha moments," and guiding students through career pathways that lead to in-demand and family-sustaining jobs in Northwest Michigan and beyond. A successful pilot of their Career Investigator platform, a tool that connects students to education, training, and career opportunities in STEM, was funded by a 2020 Seed grant. In Spring 2021, Newton's Road was awarded a \$20,750 Assets for Thriving Communities grant to develop the tool further, expanding and creating new opportunities for students to explore careers in STEM.

GET THE FULL STORY:



"We always go back to that strategic plan. If it doesn't fit in those 6 pillars, it doesn't become a priority. It is our guiding light."

-Gayenell Gentelia, Associate Director, Kalkaska DDA

GET THE FULL STORY:



KALKASKA'S RAILROAD SQUARE

Kalkaska's Downtown Development Authority is leading an effort to honor their town's history and revitalize the downtown area. Through an initial Rotary Charities Planning Grant in 2016, the Kalkaska DDA worked with consultants to reevaluate priority projects, assess community needs, and identify economic development opportunities, resulting in the Kalkaska Community Strategic Plan. Later in 2016, the DDA was awarded a Seed Grant to establish a Site Development Plan for Railroad Square. With a well-informed Site Development Plan in place, the DDA was awarded a \$75,000 Assets for Thriving Communities grant in 2017. Today, Railroad Square is home to the farmer's market, an event space and community commercial kitchen with restrooms, a new clock tower with electronic information signage, and improved street parking and stormwater drainage systems.



ORGANIC WASTE DIVERSION

In 2018, four organizations — Bay Area Recycling for Charities, SEEDS Ecology & Education Centers, Grand Traverse County Resource Recovery, and the State of Michigan Department of Environment, Great Lakes, and Energy — formed a cohort to intensively study the regional waste system in Northern Michigan. Through a 10-week Systems Practice course, they began mapping out the region's complex recycling system and discovered opportunities for regionally attainable solutions. This Seed grant awarded in early 2020 helped stakeholders narrow their focus from tackling the region's entire recycling system down to the organic waste stream. Their work to identify leverage points within markets, policy, access, culture, and education led them to a successful \$75,000 Systems Change Accelerator grant later in 2020.

"There's so much pre-work that needs to happen before you can put together a more traditionally actionable project that funders will understand. Rotary Charities' support in this space, where the necessary work is a little bit messy and there aren't clear deliverables, is so valuable."

-Sarna Salzman, Executive Director of SEEDS Ecology & Education Centers

GET THE FULL STORY:



\$1,184,213

TOTAL GRANTS
AWARDED

\$1,750,000

IMPACT
INVESTMENTS
HELD

\$109,120

INVESTED IN
NONPROFIT
CAPACITY BUILDING
SERVICES

**WE COURAGEOUSLY
LEVERAGE ALL FORMS
OF OUR CAPITAL—
FINANCIAL, KNOWLEDGE,
CONNECTIONS, &
OUR REPUTATION—TO
CONTRIBUTE TO THE
GREATEST POSSIBLE
IMPACT FOR ALL.**

**FOR EVERY \$1 GRANTED BY ROTARY
CHARITIES, GRANTEES LEVERAGED
AN ADDITIONAL \$8.94 IN FUNDING.**

“The Rotary Charities staff have been helpful and supportive throughout the entire process of our grant. They are willing to dig into the project for its success, and this makes them feel much more like our partner than just a grant administrator. This support is tempered by their respect of boundaries to let project teams do the work, resulting in that we have always felt supported but not bossed around.”

**-Paula McIntyre,
Systems Change Accelerator Grantee Partner**

ASSETS FOR THRIVING COMMUNITIES GRANTS

Organization	Purpose	Amount
Hospice of Michigan	NorthStar Navigation & NorthStar Palliative Care	\$40,000
Human Nature School	Timber Frame Barn Construction	\$44,000
Traverse Symphony Orchestra	Community Engagement Expansion	\$25,000
Civil Air Patrol, Traverse City Squadron	Aircraft Hangar & Classroom Project	\$50,000
COGNITION	Operation Growth Spurt: Exhibit Development & Building Expansion	\$50,000
Friends of the Garden Theater	Help the Garden Grow: Building Preservation	\$50,000
Grow Benzie	Benzie Hive: Nonprofit Collaborative Project	\$50,000
Habitat for Humanity Grand Traverse Region	Maple City Crossings Hope Builders Project	\$50,000
Newton's Road	Career Investigator 2.0	\$20,750
Northport Arts Association	Clay Works Studio	\$25,000
The Rock of Kingsley	Building Preservation & Expansion	\$50,000
Traverse Area District Library	Bookmobile	\$50,000
Traverse City Dance Project	Moving Theater	\$30,000
		Total: \$534,750

SYSTEMS CHANGE ACCELERATOR GRANTS

Organization	Purpose	Amount
SEEDS and collaborative partners	Organic Waste Diversion	\$75,000
Housing North	Housing North 2.0	\$125,000
NWMI Coalition to End Homelessness	Homeless Youth Initiative	\$125,000
		Total: \$325,000

SEED GRANTS

Organization	Purpose	Amount
Munson Healthcare - Shape Up North	Traverse City Area Public Schools wellness plan development	\$20,000
Bellaire Downtown Development Association	A Unifying Action Plan	\$10,000
United Way of Northwest Michigan	Wildflower Early Childhood Feasibility Study	\$10,000
The Botanic Gardens at Historic Barns Park	Capital Campaign Plan	\$10,000
Crosshatch Center for Art and Ecology	COVID-19 Program Adaptation	\$10,000
Glen Lake Association	Glen Lake/Crystal River Watershed Protection Program	\$10,000
United Way of Northwest Michigan	Literacy Alliance of Northwest Michigan	\$10,000
Conservation Resource Alliance	Mitchell Creek Collaboration Fund	\$10,000
Denos Museum Center	"Resilience: African American Artists As Agents of Change" Exhibit	\$10,000
Grand Traverse Regional Community Foundation	NW MI Community Development Coalition	\$10,000
Parallel 45 Theatre	Safe Return to the Stage - COVID-19 Adaptations	\$10,000
Sleeping Bear Gateways Council	Workforce Housing Task Force	\$10,000
Village of Central Lake	Non-motorized Trail Feasibility	\$10,000
Inland Seas Education Association	NMC Internship Program	\$10,000
Glen Arbor Arts Association	6 Ft Apart Arts Program - COVID-19 Adaptations	\$4,860
Friends of the Betsie Valley Library	Thompsonville Junction Area Revitalization Project	\$10,000
Grand Traverse County Parks and Recreation	Civic Center Master Plan	\$10,000
Northwest Michigan Arts & Culture Network	Network Development	\$10,000
Traverse Area Historical Society	Traverse City Indigenous History Project	\$10,000
		Total: \$194,960



LEARNING FUND

Organization	Purpose	Amount
City of Traverse City	Fair & Impartial Policing Training	\$2,000
SEEDS	DiSC Team Coaching	\$1,974
Festival Foundation	Certified Festival & Event Executive Certification	\$1,500
Love Thy Neighbor	Inspired Fundraising Retreat	\$177
Generations Ahead	Brainspotting Clinical Mindfulness Training	\$500
Norte	Nonprofit Leadership Summit	\$100
Women's Resource Center NM	Salesforce Training	\$2,000
Inland Seas Education Association	Association of Experimental Education Conference	\$650
Inland Seas Education Association	Accounting Principles Course	\$500
Traverse Bay Children's Advocacy Center	National Children's Alliance Conference	\$2,000
Leelanau Conservancy	Understanding Racial Justice Training by Title Track	\$1,000
Grand Traverse Pavilions Foundation	DiSC Training	\$2,000
Housing North	Development Training	\$500
Grand Traverse Conservation District	DiSC Training	\$1,962
TART Trails	Understanding Racial Justice Training by Title Track	\$2,000
FLOW for Water	Justice, Equity, Diversity, & Inclusion Training	\$2,000
Traverse Bay Children's Advocacy Center	AFP Annual Conference Attendance	\$400
Northwest Michigan Coalition to End Homelessness	Collaborative Governance and Leadership Workshop	\$199
		Total: \$21,218

EMERGING NEEDS FUND

Organization	Purpose	Amount
Title Track	Understanding Racial Justice Pilot	\$20,000
United Way of NWMI	Early Childhood Education System Support	\$50,000
Commonplace	Northsky Compass	\$20,000
		Total: \$90,000

IMPACT INVESTMENTS

Organization	Amount	
IFF	\$500,000	
Venture North	\$500,000	
Michigan Community Capital	\$500,000	
Goodwill of Northwest Michigan Community Impact Program	\$250,000	
		Total: \$1,750,000

OTHER

Organization	Purpose	Amount
Various	Trustee Gift	\$1,200
Rotary Club of Traverse City	World Community Service: Planting Seeds International	\$5,000
Rotary Club of Traverse City	World Community Service: Pure Water for the World	\$5,000
Rotary Club of Traverse City	World Community Service: Namaste Direct	\$5,000
Rotary Club of Traverse City	JJ Beckett ACCESS-Ability: Northern Lakes	\$1,085
Grand Traverse Regional Land Conservancy	In Honor of Becky Ewing	\$1,000
		Total: \$18,285



FINANCE

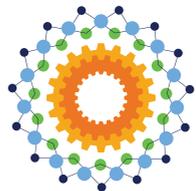
ROTARY CHARITIES	FY 2021	FY 2020
Net assets, beginning of year	\$44,966,842	\$47,798,091
REVENUE AND GAINS		
Consulting fees	44,551	28,386
Investment return, net of investment fees	11,744,896	(402)
Oil and gas royalty income	126,962	111,034
Grants and Other	55,740	8,634
TOTAL REVENUE AND GAINS	11,972,149	147,652
OPERATING EXPENSES AND GRANTS		
Program Services	2,653,100	2,857,964
Management and general	127,978	120,937
TOTAL OPERATING EXPENSES AND GRANTS	2,781,078	2,978,901
Change in net assets without donor restrictions	9,191,071	(2,822,958)
Change in net assets with donor restrictions	-	(8,291)
TOTAL CHANGE IN NET ASSETS	9,191,071	(2,831,249)
Net assets without donor restrictions end of year	54,157,913	44,966,842
Net assets with donor restrictions end of year	-	-
TOTAL NET ASSETS END OF YEAR	\$54,157,913	\$44,966,842



POWERFUL TRANSITIONS

THIS YEAR MARKED A PIVOTAL MOMENT FOR ROTARY CHARITIES.

Becky Ewing retired from her position of Executive Director after a total of 14 years of service to the organization and was succeeded by Sakura Takano after a national search. Our foundation experienced healthy transitions in staffing, inviting opportunities for reflection and intentional growth. The organization is ready to forge forward into a new era of supporting changemakers in the region.



ROTARY
CHARITIES

Resources for change.

CURRENT STAFF

Freya Bradford, Director of Systems Change & Learning
Stacey Foster, Office Manager
Kristin Hettich, Director of Community Development
Kendra Luta, Programs Associate
Miriam Owsley, Strategic Communications Manager
Sakura Takano, Chief Executive Officer

FY 20-21 STAFF

Tori Craig, Strategic Communications & Equity Manager
Freya Bradford, Director of Systems Change & Learning
Becky Ewing, Executive Director
Stacey Foster, Office Manager
Colleen Masterson - Bzdok, Director of Capacity Building & Operations
Miriam Owsley, Strategic Communications Manager
Sakura Takano, Director of Community Assets & Impact Investing

FY 20-21 BOARD OF TRUSTEES

Allison Beers*
Lorraine Beers*
Marlene Bevan*
Jen Casey
Mark Eckhoff
John Hall*
Jeff Hickman, Board Chairperson*
Randy Kamps, Rotary Club Presidential Designee
Greg Luyt*
Benjamin Marentette*
Homer Nye*
Dan Rickard, Rotary Camps & Services Board Liaison*
Trevor Tkach*

*Current Board of Trustees member



LETTERS FROM LEADERSHIP

Coming into the role as Rotary Charities' new CEO in unprecedented times has been a whirlwind, to say the least. From this new vantage point within our organization, I have never felt more inspired by our amazing community—I have witnessed generous support to those in need, hopeful aspirations for better days ahead, and a deep focus to create communities that include everyone.

In my previous role with a housing and workforce development nonprofit, I have experienced firsthand the value of Rotary Charities investments in our communities. I believe the last five years of journey making towards becoming a changemaking organization have been prescient. The organization took informed risks to encourage emerging collaborations, ecosystem building, and community asset mapping with hopes of making more durable, lasting, and broad impacts in our region. Nothing like a pandemic will ask all of us to snap quickly into new frameworks to help each other out. Our reflections also affirmed that we will continue to leverage all forms of our capital – financial, knowledge, connections, and our reputation – to contribute to the greatest possible impact for all.

You can continue to rely on Rotary Charities to be a trusted partner to help transform our region into one that is adaptive and thriving for everyone. I am honored to lead our organization, partner with stakeholders and support the many changemakers working to help our region thrive.

Sincerely,
Sakura Takano, Chief Executive Officer

In recent years, Rotary Charities has been a supporting organization that uses a systems approach to tackle complex community problems. And, as it would happen, in the year 2020-21 we found ourselves undergoing a change of systems of our own as we engaged in strategic planning and searched for a CEO to succeed Becky Ewing.

The board's strategic planning process helped to hone our leadership skills, confirm our commitment to an ever-improving culture, and allowed us the opportunity to envision the next few years at Rotary Charities. Our board's passion for our mission rose to a new level as we challenged ourselves to increase our impact in the region we serve while maintaining our commitment to funding in perpetuity.

The search for a new CEO proved to be an affirming experience. With the help of a professional recruiter who shared our opening nationally, we received 50 applications in 30 days from individuals all over the country. We conducted three rounds of interviews and invited the three finalists to make individual presentations to the board. From those presentations, one candidate exemplified the leadership and vision our board was searching for; Sakura Takano, Rotary Charities' Director of Community Assets and Impact Investing.

Meanwhile, as Becky Ewing's days at the Executive Director position came to close, we reflected on her 14-year legacy here at Rotary Charities. Her stewardship guided us as we transitioned from a charity to a changemaking organization, and her imprint on Northern Michigan communities is lasting.

Through it all, it is a sincere honor to be part of this organization as it continues to have a positive impact on our communities today, tomorrow, and forever.

Gratefully,
Jeff Hickman, Chairperson, Board of Trustees



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