

# Shiawassee

## community foundation<sup>SM</sup>

### Annual Report

#### Letter to the Community -

The Shiawassee Community Foundation is pleased to announce its Strategic Plan for 2017 to 2020. As we began our planning process and considered those we serve, it was clear that our community has compelling and important needs that a community foundation is uniquely positioned to address. A primary goal of this plan is to position SCF to play a leadership role in bringing positive changes to the Shiawassee County area. We will accomplish this by increasing awareness of our organization, engaging community partners in important initiatives, and providing funding for priority projects.

This document was created during a series of planning sessions involving a consultant from the Council of Michigan Foundations, our board members, volunteers, and staff. Our hope is that we have developed a focused set of strategies that will strengthen our working relationships with community leaders and grow our grant-making capabilities to better meet community needs.

We are excited by the opportunities this plan presents for our team and the region we serve. You are invited to join us in moving this plan forward.

The four key points of our Strategic Plan are:

1. Increase the visibility, awareness, and understanding of our community foundation
  - a. Develop an annual marketing/outreach program
  - b. Develop a next generation website
2. Increase revenue available for scholarships, grants, and administrative needs
  - a. Grow our current funds
  - b. Raise unrestricted funds for administrative needs and proactive grant-making projects
3. Further develop our board
  - a. Recruit board and/or committee members who are comfortable in donor development
  - b. Board education
4. Become a proactive grant-maker by identifying priority community needs and social issues, encouraging collaboration to address them, and providing funding for these initiatives.
  - a. Establish a process to identify priority community needs
  - b. Learn more about proactive grant-making and collaborating

The Shiawassee Community Foundation allows individuals, families and corporations a way to give back in a convenient and cost-effective way. The Foundation currently manages over 100 different funds in which donors may contribute any amount they choose.

The minimum to start a new fund is \$5,000 (a smaller amount will be considered if the fund will reach the minimum value during the first year). Grants and scholarships are awarded after the fund balance has reached \$10,000 and earnings are sufficient. The annual percentage to be spent is approved by the board. Distributions are possible before the fund reaches \$10,000 if gifts are directed to the "spendable" fund balance. To start a new fund, simply contact Carol Soule at 989-725-1093 to discuss your charitable interests.

Some donors choose to leave a legacy by including the Foundation in their estate plan. The Foundation has received bequests that either add to existing funds or start a new fund.

The Foundation was established 43 years ago, more than \$2.6 million has been awarded in grants and scholarships for the benefit of our community. The total assets of the Foundation has grown from approximately \$27,000 to over \$7.4 million today.

We want to thank all of our donors, professional advisors, board members, staff and the many volunteers who have helped us grow over the years. Please consider making a gift to your favorite fund, creating a new fund and/or volunteering to help your Foundation carry out its mission.



Confirmed in compliance with National Standards for U.S. Community Foundations.

#### Shiawassee Community Foundation

217 N. Washington Street,  
Suite 104, Owosso, MI  
989-725-1093

www.shiawasseecommunityfoundation.org

shiafdn@michonline.net

#### OUR MISSION

To enrich the quality of life in the Shiawassee region by building sustainable funds from a wide range of donors to fund emerging community needs For good. For ever.

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#### FINANCIAL INFORMATION

The Shiawassee Community Foundation is fully accountable to its donors and citizens of our community. The audited financial statements and IRS 990 and IRS 990-T (if it becomes necessary for the Foundation to file such a form) are open to public inspection. Our records, with the exception of specific donor information, are available upon request.



Thank You Shiawassee Community Foundation

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# Shiawassee Community Foundation Annual Report

## SHIAWASSEE COMMUNITY FOUNDATION 2017

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### STAFF MEMBERS:

Carol Soule, Executive Director, 989-720-7440  
  
Lisa Clark, Administrative Assistant, 989-720-7442  
  
Jessica Hickey, YAC Advisor, 989-720-7441

## Youth Advisory Council (YAC)

The Youth Advisory Council is made up of students from Shiawassee County who are interested in making our community a better place. YAC members volunteer their time and talent by providing grants and helping with various community service projects.

Students ages 12-21 are welcome to join the YAC group. They simply need to complete our YAC application form, which can be found on our website at [www.shiawasseecommunityfoundation.org](http://www.shiawasseecommunityfoundation.org), or contact Jessica Hickey at 989-720-7441. YAC

meetings are normally held on the third Sunday of the month at 3:00 p.m. during the school year.

We are pleased to welcome our new YAC Advisor, Jessica Hickey. A California native, Jessica moved to the Midwest in 2014 and has made Owosso her home. She is an experienced grants administrator with additional background in human resources and writing. She holds a Bachelor's degree from Santa Clara University. Jessica is married with one child, whom she homeschools.



## GRANTS

### AGENCY FUND GRANTS:

*The following grants were awarded directly to the agency from their respective endowment funds:*

American Red Cross Mid-Michigan Chapter Fund: \$321  
Frances L. and Joseph R. DeVries, DVM, Nature Conservancy Fund: \$45,477  
Durand Union Station, Inc. \$1,322  
MSTRP, Inc. - Project 1225 Fund \$1,108  
Gweneth B. Osborne Memorial Fund: Respite Volunteers of Shiawassee \$398  
Owosso Citadel of the Salvation Army Fund (in Memory of Alvin E. Honke): \$463  
Shiawassee County Humane Society Fund: \$4,928  
Shiawassee Postsecondary Access Network Fund: Shiawassee RESD \$50,000

### FIELD OF INTEREST FUND GRANTS:

PFC Shane W. Cantu Memorial Fund:  
American Legion Post 57 \$5,000  
Owosso Memorial VFW Post 9455 \$5,775  
  
Alford and Alice Emmert Youth Fund:  
Girl Scouts Heart of Michigan \$700  
Cub Scout Pack 240/Bryant School PTO \$1,200  
  
Gerald Gilbert Memorial Endowment Fund:  
Shiawassee Arts Council \$1,500  
Shiawassee Family YMCA \$1,000

The Ryan Jones Memorial Fund (for the benefit of ALS patients and animal welfare purposes):

JK Builders \$15,000  
City of Owosso-Community Cats \$1,000  
John's Home Improvements \$2,475

Memorial Healthcare Community Health and Education Fund:  
Respite Volunteers of Shiawassee \$3,600  
DeVries Nature Conservancy \$5,000  
Muscular Dystrophy Association, Inc. \$5,000

Montgomery Family Fund:  
Child Abuse Prevention Council of Shiawassee County \$400  
Village of Bancroft \$400

Playground Restoration and Maintenance Fund:  
Village of Bancroft \$500  
City of Corunna \$500

Unrestricted Fund: Council of Michigan Foundations \$2,000

Russell and Annabelle Woodard Family Fund:  
Owosso High School \$650  
Looking Glass Community Outreach \$650

In addition, the Youth Advisory Council awarded grants from the W.K. Kellogg YAC Fund.

In the 2016-2017 season, YAC members devoted many hours to community service and awarded over \$17,200 in grants to: \$3,498 – Purchase holiday gifts for low income families through

Capital Area Community Services  
\$ 360 – Benson's Literacy Foundation  
\$ 420 – Owosso High School  
\$ 250 – Corunna Parks and Recreation  
\$1,000 – Laingsburg Clothesline  
\$1,900 – Shiawassee HOPE  
\$1,000 – The Arc Shiawassee  
\$ 455 – Purchase of theater tickets for Random Acts of Kindness Day  
\$ 600 – E.E. Knight Elementary School  
\$1,000 – Shiawassee United Way  
\$1,000 – Capital Area Community Services Walk for Warmth  
\$ 222 – Owosso High School  
\$ 600 – Salvation Army  
\$ 775 – Shiawassee Arts Council  
\$ 505 – Byron Middle School  
\$ 807 – Byron Robotics 5641  
\$1,800 – Community District Library  
\$ 750 – Girls on the Run – Mid-Michigan  
\$ 300 – Looking Glass Community Outreach

This year, the YAC grant cycle begins in October, and applications are due February 9, 2018.



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**Rory C Keay**  
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The Shiawassee Community Foundation has awarded grants and scholarships totaling more than \$315,000 this fiscal year.

**SCHOLARSHIPS**

The following scholarships were awarded in 2017. Scholarship checks are sent directly to the college on behalf of the student.

<b>Alexander Women's Scholarship Fund:</b> Ellen Campbell	\$350
<b>Karl F. and Ziritha H. (Lowers) Allert Memorial Scholarship Fund:</b> Blair L. Van Agen	\$1,000
<b>Byron Community Scholarship Fund:</b> Amanda Magnan Darnell Adams Madison M. Montgomery Parker M. Viele Jordan A. Goodrich Payne A. Staton Samuel O. Thompson Hannah J. Hooley Blair L. Van Agen Robin E. Howard	\$900 \$200 \$900 \$200 \$900 \$900 \$200 \$900 \$900 \$200
<b>Byron Community Scholarship Fund-Chase Bank:</b> Ashley L. Glass	\$500

<b>Byron Community Scholarship Fund-Duncanson:</b> Jessica M. Marvin Carsen J. Rawles	\$900 \$900
<b>Nancy Ruth Patenge Beyer Memorial Scholarship Fund:</b> Sierra Davis Gabriel J. Gaskin	\$700 \$700
<b>Dr. Bhaskaran Memorial Scholarship Fund:</b> Brook H. Schneider	\$500
<b>Elsie Blair and Suzanne Blair Anderson Memorial Scholarship Fund:</b> Claudia L. Freed	\$500
<b>Olive Blanner Scholarship Fund:</b> Taylor R. Cook Thomas J. Horak Randall D. Dorff	\$1,000 \$1,000 \$1,000
<b>Emily Chapman Memorial Scholarship Fund:</b> Adrianna L. Hammer Randy L. Will Brooke Raley Kennidy L. Coburn	\$500 \$500 \$500 \$500
<b>Philip and Inez Colton Memorial Scholarship Fund:</b> Nathan B. Nicevski	\$500

<b>Drew Decker Memorial Music Scholarship Fund:</b> Evan A. MacKay Trent Ivey Eric R. Locker	\$750 \$340 \$1,000
<b>Norman L. and Marcella C. DesJardins Memorial Scholarship Fund:</b> Jay W. Michels	\$1,000
<b>Shana Lynne Dumond Memorial Scholarship Fund:</b> Alden R. Johnson Randall D. Dorff	\$500 \$500
<b>Durand Lions Club Scholarship Fund:</b> Samuel O. Thompson	\$1,000
<b>Durand Rotary Club Scholarship Fund:</b> Abigail Cottrell Randy L. Will	\$500 \$500
<b>Durand St. Mary's Knights of Columbus Council 7955 Scholarship Fund:</b> Julie O'Berry	\$1,000
<b>Shelli (Bowles) Edgington Memorial Scholarship Fund:</b> Faith Snyder	\$500
<b>Alford and Alice Emmert Scholarship Fund:</b> Braelyn R. Hill	\$2,300
<b>D &amp; B Galloway Scholarship Fund:</b> LeAnn J. Morse Sage Fahey Madison M. Montgomery Madison A. Lewis Jordyn E. Barta	\$800 \$800 \$800 \$800 \$800
<b>The GFWC Owosso Woman's Club Scholarship Fund:</b> Leslie N. Bedrosian	\$700
<b>Cyril C. and Ella M. Gregoricka Scholarship Fund:</b> Nash D. Hart (Environmental Engineering Scholarship) Lily E. Meyer (Agricultural Scholarship)	\$500 \$500

<b>Phyllis Lundie Gruver Memorial Scholarship Fund:</b> Adrianna L. Hammer Sarah F. Timlick	\$500 \$1,000
<b>Harold J. Haas Memorial Scholarship Fund:</b> Lily E. Meyer	\$500
<b>Harry W. and Olive E. Harder Memorial Scholarship Fund:</b> Tessie Stauble Sada Reed Andrew Pearson Cameron Counterman Hailey M. Frederiksen Chelsea Simmons Kelsay Garner Danielle S. Bannister	\$25 \$35 \$325 \$25 \$22 \$22 \$300 \$22
<b>Coach Tom Harkema Athletic Scholarship Fund:</b> Nathan B. Nicevski	\$3,000
<b>Ellane I. Hogan Memorial Scholarship Fund:</b> Faith Snyder	\$500
<b>C.S. Hood Memorial Scholarship Fund:</b> Charity Cummings Emmory Jackson Braelyn R. Hill	\$2,200 \$4,200 \$2,200
<b>Cheryl L. Hrcka Memorial Scholarship Fund:</b> Cameron Welte Patrick C. Butcher Joseph D. Vondrasek Nathanael J. Clolinger	\$400 \$400 \$400 \$400
<b>Harold V. and Ima B. Johns Memorial Scholarship Fund:</b> Alyssa Coffman	\$1,000
<b>Kailey Elizabeth Jordan Memorial Fund:</b> Renew Therapeutic Riding Center Equest Center for Therapeutic Riding, Inc. Banbury Cross Therapeutic Riding Center	\$1,680 \$960 \$250

Continued on Page 4



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<b>Phyllis L. and Alton D. Crandell Memorial Scholarship Fund:</b> Olivia G. Meksula	\$1,200
<b>Karen K. Dasen Memorial Scholarship Fund:</b> Baylee J. Balcom Charity Cummings Skye A. Rivett	\$1,000 \$1,000 \$1,000
<b>Rollin V. Dasen Memorial Scholarship Fund:</b> Allison N. Grubb Eric R. Locker	\$1,500 \$1,500



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**Donald A. Knieper Memorial Scholarship Fund:**

Emily Wenzlick \$500  
Nicole Theodore \$500  
Luke Krupp \$500  
Claudia L. Freed \$500

**Kris Marie Kulhanek Memorial Fund:**

Trace Pardee \$1,000  
Parker A. Bukantis \$1,000

**LaJoye-Shenk Scholarship Fund:**

Rachael Buhler \$900  
Nikki L. Morrish \$1,000

**Jackie Leone Memorial Scholarship Fund:**

Patrick C. Butcher \$1,000

**Jill Malzahn Health Fund:**

Kyle G. Mesh \$500

**Robert McAlpine Memorial Scholarship Fund:**

Caleb Pratt \$150  
Tessie Stauble \$150  
Ethan Hansen \$150  
Cameron Counterman \$150  
Carolyn D. Fairchild \$150  
Danielle S. Bannister \$150

**Raymond McLaughlin Memorial Scholarship Fund:**

Caleb Pratt \$150  
Kaitlyn M. Rayburn \$290  
Nicole Rayburn \$290  
Tessie Stauble \$150  
Kaylynn M. Claybaugh \$290  
Sada Reed \$290  
Mark T. Sworm \$290  
Aiden Stauble \$290  
Raidhrich V. Krautheim \$290  
Cameron Counterman \$150  
Carolyn D. Fairchild \$150  
Hailey M. Frederiksen \$290

Breanna Simmons \$290  
Chelsea Simmons \$290  
Brandon Fairchild \$290  
Aidan Loos \$290  
Joseph Bennett \$290  
Drew A. Jones \$290  
Julia M. DeYoung \$290  
Danielle S. Bannister \$150  
Alex J. Gorney \$290  
Ethan Hansen \$150

**JoAnn (Butcher) Nelson Memorial Scholarship Fund:**

Baylee J. Balcom \$1,000  
Patrick C. Butcher \$1,000  
Sally Armstrong \$1,000  
Braelyn R. Hill \$1,000  
Kyle G. Mesh \$1,000

**New Lothrop Schools Endowment Fund:**

Carter J. Hemgesberg \$350

**John Northway Memorial Golf Scholarship:**

Colton Koeplinger \$500  
Kennedy Krantz \$500

**Nathan Nover Memorial Scholarship Fund:**

Chloe L. Keener \$950

**Nover Owosso High School Sparkplug Award Fund:**

Jay W. Michels \$500

**Owosso Education Association's Mary E. Harper Scholarship Fund:**

Natalie A. Park \$700  
Natalie R. Taylor \$700

**Owosso High School Leadership Scholarship Fund:**

Heidi L. Slawson \$450

**Paul Penjaska Family Scholarship Fund:**

Brendan Glennie \$4,400  
Hunter J. Knieper \$4,400

Nash D. Hart \$4,400  
Jay Stap \$4,400  
Samuel O. Thompson \$3,400  
Kaila G. Daley \$4,400

**Michael Anthony Randolph Memorial Scholarship Fund:**

Madison A. Wilhelm \$425

**David A. Reed Agricultural Fund:**

Kaitlyn I. Hanna \$1,300

**Evan James Reed Memorial Scholarship Fund:**

Ashley J. Stephens \$500

**Andrew Rehmann Memorial Fund:**

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Cameron Welte \$1,000  
Faith Snyder \$1,000  
Patrick S. Vreibel \$1,000  
Randall D. Dorff \$1,000  
Joseph D. Vondrasek \$1,000  
Danielle C. Hankerd \$1,000

**Owen A. and D. Arlene Rood Journalism Scholarship Fund:**

Sarah Sopocy \$500

**Erwin Ryckman Scholarship Fund:**

Gwynneth Coselman \$450

**Bill and Kay Scarlett Family Memorial Scholarship Fund:**

Christina J. Laidler \$500  
Danielle C. Hankerd \$1,000  
Blake Schnell \$750

**Ronald K. Seelhoff Memorial Scholarship Fund:**

Patrick S. Vreibel \$1,200

**Joseph T. Sierzenga, III Memorial Scholarship Fund:**

Cameron Welte \$350

**Robert G. Skinner Memorial Scholarship Fund:**  
Ashley L. Glass \$1,000

**Devin Allen Swatman Memorial Scholarship Fund:**

Nathan B. Nicevski \$4,600

**Roger and Marian Talbot Family Scholarship Fund:**

Casey Hulbert \$500

**Brad A. VanPelt Memorial Scholarship Fund:**

Lauren Spicer \$1,100  
Randall D. Dorff \$1,100

**Troy A. Vincke Memorial Scholarship Fund:**

Lauryn Bishop \$1,000

**Mary Bea deBoom Wasper Scholarship Fund:**

Emily Suggs \$300

**Mackenzie L. Watts Memorial Fund:**

Corunna Public Schools \$1,100 (for defibrillator)  
Ashley P. Strong \$1,000  
Sophia M. Montesanti \$1,000  
Elena M. Owens \$1,000

**Merijo Wieber Scholarship Fund:**

Natalie R. Taylor \$1,200

**Carl R. Woodbury Memorial Scholarship Fund:**

Easton Feinauer \$900

**Kevin A. Zmitko Agricultural Scholarship Fund:**

Trace Pardee \$500

**Zonta Club of Owosso Scholarship Fund:**

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Natalie A. Park \$1,000  
Heidi L. Slawson \$1,000

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