

Blueprints For Our Community's Future

Inspired by the Legacy of Herman "Winks" Gundlach

ANNUAL REPORT 2016



Keweenaw

community foundation

For good. For ever.

We inspire giving that invests in our community's quality of life.

Dear Community,

Our theme for this year's report is "**Blueprints for Our Community's Future**" so fittingly we pay tribute to a man who not only left behind a physical legacy in so many of our public and private buildings, but who also had the foresight to create an endowment that is building the future of the Keweenaw even now. Taking our inspiration from "Winks" Gundlach's example, we'd like to share with you some of what we've built together in 2016 as a blueprint for where we plan to go in 2017.

One key component of this "blueprint for the future" is our new web site, keweenawgives.org. Now we have a place to tell the stories for each of our funds so that the larger community can see the good work these funds are doing. The website also aids the fundraising and grant application process and includes a page where every press release about a donor function, a new endowment, or a grant award can be found.

Along with telling our all-important donor stories, our new website includes a **Planned Giving** section (www.keweenawlegacy.org) which provides visitors and potential donors with all the information and tools they need to make a planned gift to KCF—from a will planner, to various calculators that aid in financial decisions around planned giving.

One of the blue prints that's still in the design stage is KCF's grant application for the MacArthur Foundation's first ever **\$100 Million & Change Grant**. Houghton and Keweenaw counties suffer from the highest electric rates on the U.S. mainland inhibiting

economic development and contributing to endemic poverty. KCF's grant proposal calls for replacing our out-of-state, fossil fuel-based electric infrastructure with a renewable energy smart grid based on durable local resources of wind, solar, and biomass assets. This grant proposal, whether it wins the coveted prize or not, has already garnered considerable regional attention and can serve as a blueprint to help move our region's economy forward.

The non-profits that KCF supports do vital work in our community, and in 2016, 226 of you gave over \$300,000 to support this work through KCF. Impressive numbers that we know we can build on in 2017.

So thank you. Thank you for giving to the Keweenaw Community Foundation when there are many other demands on your resources. Thank you for making philanthropy a priority. Thank you for trusting us with your gifts. Together we will continue to make Keweenaw and Houghton counties a better place.

Jonathan D. Julien
Chairman, Board of Trustees



Jim Vivian
Executive Director



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

National Standards accreditation represents operational effectiveness to foster excellence in community philanthropy.

Excellence. Accountability. Impact.™

Our annual audit, IRS Form 990, IRS Form 990-T, and our annual application for the State of Michigan License to Solicit Donations are available at our office during business hours as well as on our website. For our investment information, the names of our investment managers, members of our investment committee, and the administrative fees charged, please e-mail us at mail@k-c-f.org or call (906) 482-9673.

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YAC, YAC, YAC

The Keweenaw Community Foundation's Youth Advisory Council (YAC) was developed and supported by the Michigan Community Foundations' Youth Project to spread youth philanthropy in the state, an initiative that was launched by the W.K. Kellogg Foundation and the community foundation members of Council of Michigan Foundations. Today, there are over 1,500 young people serving on 86 youth grantmaking committees statewide. Endowment fund assets exceed \$62 million and collectively give \$1.5 million in grants per year. KCF's YAC alone has granted over \$150,000 in funds since its inception.

Through our Youth Advisory Council, we strengthen the leadership and charitable commitment of youth in our community by providing opportunities to develop solutions to serious problems. Over the last year, these students awarded \$30,200 to 16 local organizations, partnered with 31 Backpacks to help 183 students from Copper Country schools receive books for the holidays, winterized multiple homes with the Houghton Energy Efficiency Team, and had six students attend the 2016 State Youth Grantmakers' Conference. We couldn't be prouder of the work YAC does for the community!

YAC members working on community winterization projects through HEET (Houghton Energy Efficiency Team).

Goal #1:

Engage youth in philanthropy.

Goal #2:

Engage youth in addressing the needs of local youth.

Goal #3:

Engage youth in community service.

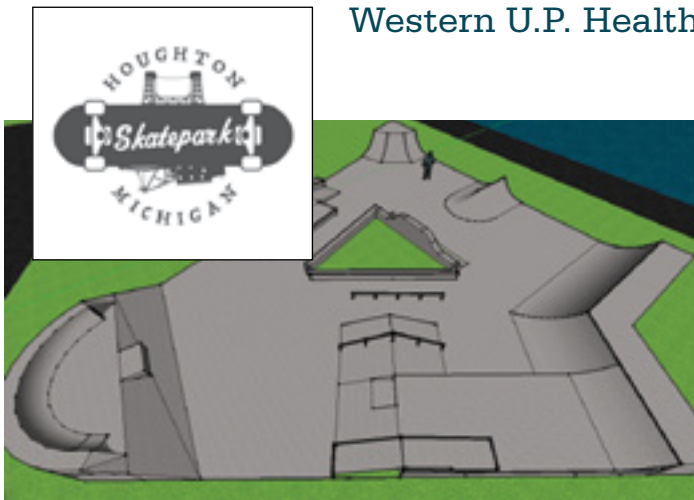


First, identify a need—

According to the 2010 US census, skateboarding has over 8 million participants, outranking hockey, skiing, and, in kids aged 6–17, it even outranks little league baseball. Despite these massive numbers, there is no sanctioned place to skate in Houghton or neighboring Hancock, leaving local skaters with few if any options.

“This is a great way for kids to get healthy physical activity. We want to have a state of the art facility so that people have a publicly-sponsored area where they can go and do what they love to do.”

—Ray Sharp,
Western U.P. Health



then, work to meet it.

In its 2014 update to its Master Plan, the City of Houghton identified a skate park as a targeted project to be constructed by 2018. The skatepark is also recognized in the city's Recreation Plan.

In 2015, a group of community leaders started work on a common goal to construct a public concrete skatepark in Houghton, Michigan. The group's plan was to build a phase-centric park, with the first phase covering approximately 3,200 square feet and costing \$125,000. The City of Houghton has committed to donating a parcel of the East Houghton Waterfront Park for the skatepark, and the **Tony Hawk Foundation** selected the Houghton Skatepark Project as one of its **Summer 2016 Tony Hawk Foundation Skatepark Grant recipients**, granting \$10,000 to help create a safe skatepark in Houghton. Additionally, KCF granted \$3,000 through our Bernadette Yeoman-Oullette's Funding Youth Initiatives endowment and Neuvokas, manufacturer of GatorBar rebar out of Ahmeek, Michigan, has committed to a discount on rebar as well as a \$1,000 monetary donation. The committee estimates the Neuvokas donation value at \$6,500 toward the final fundraising goal.

Want to help grow this fund for our community's youth? Visit kweenawcommunityfoundation.org/funds/houghton-skatepark

2016 KEWEENAW BREWFEST

\$25,000+ raised during the event



SAVE THE DATE: 9/2/17

52 different breweries • 232 different beers, hard ciders, and hard sodas • Music by Bob Hiltunen and friends • Food from Carmelitas, The Fitz, and Vollwerth's



Community Impact Fund

Most of us would agree that planning ahead is a good idea, especially when it comes to finances. In the world of philanthropy that means growing an “unrestricted” fund that can be used by the foundation for whatever crisis—or opportunity—may arise.

The **Community Impact Fund** is our most flexible financial vehicle, allowing KCF to meet the changing needs of our community. Unlike an endowment that is tied to a particular interest area—for example, environmental causes—grants from our Community Impact Fund are not restricted to a particular group or interest but can be used to meet any community need. Decisions on what to fund are made with input from the community and with guidance from recently conducted community needs surveys.

Help us grow this all-important fund in 2017 by making a gift at keweenawcommunityfoundation.org/funds/community-impact-fund



The Keweenaw Community Foundation’s annual **KEWEENAW GOLD FUNDRAISER** was held on March 22nd. Over **\$25,000 WAS RAISED** in total, which will go to supporting our mission of “inspiring giving that invests in our community’s quality of life.”

Attendees had the chance to join the Keweenaw Gold Club by purchasing a tile made from minerals from the Clark Mine in Copper Harbor. Half of the proceeds went to support the endowment of their choice. This year, \$5,400 was raised from the Keweenaw Gold Club, the proceeds of which went to 11 different organizations.

2016 AWARD RECIPIENTS:

Herman “Winks” Gundach Award – **JOE KIRKISH**

Volunteer of the Year Award – **CAROLYN PETERSON (Alive Inside)**

12 Ways to Give

- #1 Mail us a check
- #2 Donate online
- #3 Stop by our office
- #4 Attend Keweenaw Gold
- #5 Attend Keweenaw Brewfest
- #6 Open an endowment
- #7 Explore planned giving
- #8 Serve on a committee
- #9 Volunteer at our events
- #10 Purchase a brick
- #11 Tell people about us
- #12 Make us your Amazon Smiles charity



John Sanregret, Jack Eberhart, Glenn Anderson, and Mary Lou Anderson

SAVE THE DATE: 3/15/17

BUILDING A LEGACY

The Herman Gundlach Fund

LOOKING AROUND THE WORLD—and sometimes even looking at our small corner of the world here in the Keweenaw—it's easy to think we live in cynical times. All the more reason to celebrate the life of Herman “Winks” Gundlach Jr., a business man who cared about the positive impact he had on the community he lived in and loved.

As the head of Gundlach Construction, “Winks” had a hand in building many of the permanent structures we see around us: school buildings, performing arts centers, civic spaces. But we here at KCF would argue that his greatest impact is still being felt today through the endowment he provided for the future good.

Upon his death at age 91 in 2005, the Herman Gundlach Fund was created to continue his legacy of giving back to the community. Originally, \$30,000 was earmarked for the 2016 period of funding, but after receiving the applications, the Gundlach family decided to fund all 17 local organizations' projects with a grant amount totaling \$69,531.

“Winks could never have turned down or chosen among any of these worthy causes,” they responded. And our community is better for his generosity.



Tax deductible contributions may be made to the Herman Gundlach Fund (or to any of KCF's 70+ other funds) online at www.keweenawgives.org. All contributions to a permanent endowment of KCF qualify for a Federal Tax Credit.

Historical blueprint documents courtesy of Michigan Tech Archives

The *Legacy Society*

*Jim and Linda Belote
Paul and Robertine Freshwater
Ronald and Lou Ellyn Helman
Martha Kinzel*
Terry Kinzel and Sue Ellen Kingsley
Marilyn Mason*
Anne C. McEvoy
Herman Gundlach**

Eileen Niva
Ruth E. Sablich
Elvis J. Scott
Douglas and Norma Lee Stuart
Bernadette Yeoman-Ouellette
Stephen Nicholls**

*deceased

Legacy Society members have made a commitment to the future of the Keweenaw through a planned gift or bequest to the Keweenaw Community Foundation.

ORGANIZATIONS THAT RECEIVED FUNDING IN 2016 THROUGH THE HERMAN GUNDLACH FUND:

OMEGA HOUSE for continued funding for their Caring Hands Massage Therapy program.

HOUGHTON MIDDLE SCHOOL, Keweenaw Invasive Species Management Area, and Lake Superior Stewardship Initiative for the Houghton Middle School Environmental & Sustainability Science project to increase participation and hands-on opportunities for 7th and 8th grade science students at Houghton Middle School.

TRAP ROCK 4-H CLUB and Calumet Art Center for the Club Youth Art Program to create and develop art activities for 22 youth ages 6–17.

KEWEENAW FAMILY RESOURCE CENTER for the Strong Families Keweenaw project to provide families with young children opportunities that will increase their family wellbeing, knowledge to support the health of their children, and access to community resources.

MICHIGAN TECH FUND for the Parade of Nations to serve the community with an innovative and unique international experience.

SUPERIOR SCHOOL OF GYMNASTICS and Lake Linden-Hubbell Public Schools to purchase a Tumbler Trak (Porta Trak) that is designed to prevent injuries and can be utilized at every age and level as well as for skill training in all gymnastics events.

WESTERN UPPER PENINSULA HEALTHCARE ACCESS COALITION to facilitate access to quality, affordable oral health care to residents with limited income and a lack of dental insurance.

COPPER COUNTRY HUMANE SOCIETY for SNAP (Spay/Neuter Assistance Program) to provide financial assistance to help spay and neuter animals in our community.

KEWEENAW HERITAGE CENTER at St. Anne's to augment funds for winterization, locks, and repairs to glass blocks in order to continue to provide a secure venue for the transmission of heritage activities and life events.

CANTERBURY HOUSE for the Food Pantry & Meals project to help alleviate hunger in our community.

SOUTHERN KEWEENAW TRAILS for the Soke Trailhead & System Development project to purchase a trailhead map, trail intersection maps, picnic tables, grills, and trail maintenance supplies for the Greenland and Keweenaw Trails System.

CARNEGIE MUSEUM for the "Music at the Museum" series to provide honoraria for performers and for refreshments for a series of five musical event fundraisers for the Museum.

U.P. KIDS: BIG BROTHERS BIG SISTERS in support of their High Five Mentoring program serving children and youth in the CLK School District.

HOUGHTON MI SKATEPARK project to build a 3,200 sq. ft., professionally built concrete outdoor skatepark to provide a designated quality area to support the youth and adults that pursue skating and BMX cycling as a sport.

SWEDETOWN TRAILS CLUB to replace major equipment needed to sustain and improve winter recreation trails at Swedetown.

LITTLE BROTHERS—FRIENDS OF THE ELDERLY to provide crucially-needed operational support for their supplemental firewood program which helps offset the high cost of heating during the winter for the elderly who still heat with wood.

DIAL HELP to sustain youth crisis and suicide intervention services.

"Winks's spirit of giving lives on not only through this fund, which will continue to grow for good and forever, but also through the projects and organizations that do so much good for so many in our community."

—Jim Vivian, Executive Director, KCF

Ronald & Lou Ellyn Helman Scholarship

COMMUNITY-MINDED PEOPLE ON A mission—the best description we can think of for Ron and Lou Ellyn Helman. Through their generosity, a scholarship fund exists whose purpose is to encourage skilled, motivated students to enter trades such as carpentry, plumbing, electrical, secretarial, and automotive services. The **Ron and Lou Ellyn Helman Scholarship Fund** will award high school graduates scholarships to assist post-secondary vocational education to create skilled workers who are self-sufficient, reliable, and contributing members of society.

The Helmans are currently growing the endowment to make the scholarships substantial and sustainable. Contributions are welcome!

Along with their generosity to the youth of the Keweenaw, the Helman's have also taken advantage of the tax benefits derived from setting up a charitable trust with KCF so that their legacy of giving will endure.



“Thank you—two of the most powerful words in the English language. And we certainly owe a big thank you to Ron and Lou Ellyn for their gift to the future of our youth.”

—Jim Vivian, Executive Director, KCF

Join the *Legacy Society*
with a planned gift
to the Keweenaw
Community Foundation
www.keweenawlegacy.org

When you make a commitment to the future of the Keweenaw through a planned gift or bequest to the Keweenaw Community Foundation, you are invited to join the Foundation's Legacy Society. Legacy Society members have made such a commitment by naming the Foundation in their wills or trusts, planned gifts, qualified retirement plans, or life insurance policies. We recognize and thank the following Legacy Society members for preserving a portion of their estates for our community—For good. For ever.

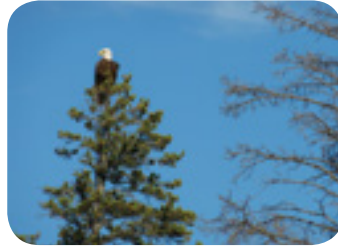
Field of Interest Funds

Field of interest funds are created to provide annual support for grants targeted toward specific areas of community needs and interests, to meet changing conditions and/or enhance the quality of life in the Keweenaw. Volunteers from the community with a passion for a particular field of interest volunteer their time and expertise to carefully consider all grant applications. We have four field of interests serving our community—

ARTS



ENVIRONMENT



YOUTH



RECREATION



In 2016, one example of a **Field of Interest Fund** that is making a difference in our community is our Keweenaw Cross Country Endowment which recently awarded funding to the Keweenaw Nordic Ski Club to help defray the cost of purchasing a new snowmobile for cross country ski trail grooming and track setting. Keweenaw Nordic Ski Club's mission is to promote the sport of cross-country skiing in the Keweenaw Peninsula for both youth and adults and to provide stewardship of the Maasto Hiihto and Churning Rapids trails. KNSC is committed to ensuring trails will always be usable year round for silent sports. To accomplish their mission effectively requires an enormous investment, both in paid and volunteer labor, and especially in equipment, tools, and supplies. This grant from our endowment is already helping them fulfill that mission.

Other organizations that were granted funds from this Field of Interest Endowment in 2016 include Swedetown Trails for grooming equipment and Ski Tigers for new race suits for competition. Outdoor winter recreation is important to all sectors of our community, young and old, visitor and year-round resident and we're particularly gratified that KCF funds are playing a part in keeping everyone out on the trails. Want to help? Visit the fund site on our website and make a contribution: keweenawcommunityfoundation.org/funds/keweenaw-cross-country-skiing.

WHAT WE'VE BUILT TOGETHER IN 2016

\$311,528 donated by **226** donors who made **369** separate gifts

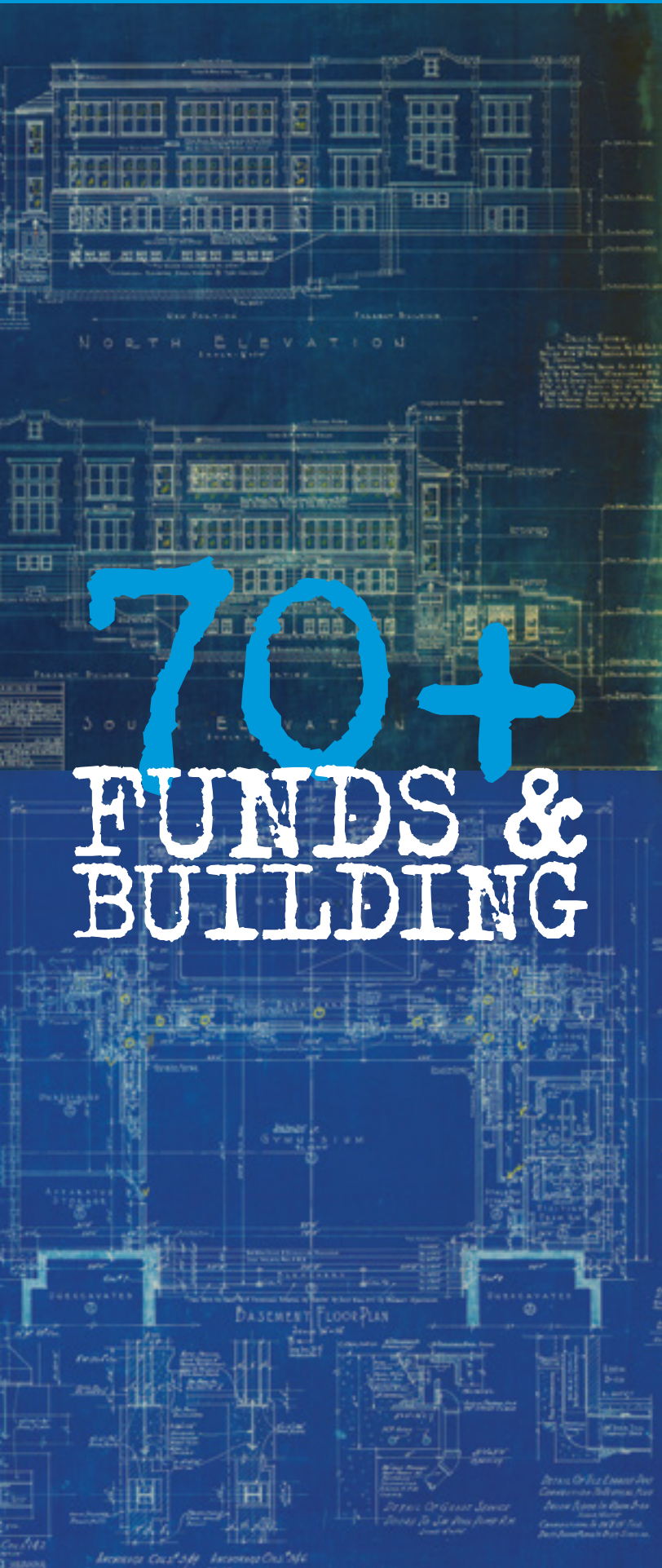
\$30,200 in YAC grants to **16** local organizations

4 scholarships awarded & **\$178,000** granted to **73** total organizations

Total Assets **\$7,104,930**

WHAT WILL WE BUILD IN 2017?

www.keweenawgives.org • (906) 482-9673



DESIGNATED ENDOWMENTS

You can direct your gift to a specific nonprofit organization or purpose. Help provide ongoing funding for a senior center, museum, your church, or virtually any nonprofit charitable organization. Nonprofit organizations can use a Designated Fund through the Keweenaw Community Foundation to build their endowment and enhance their ability to accept large and complex gifts.

- A. E. Seaman Mineral Museum**
- Agnes & Elmo Negro Fund – Calumet Skating Club**
- Barbara Kettle Gundlach Shelter**
- Boy Scouts of America, Bay Lakes Council**
- Calumet Art Center/Ed Gray/Miskwabik**
- Calumet Theatre Company**
- Carnegie Museum**
- CLK Youth Hockey Fund**
- Copper Country Autism Awareness**
- Copper Country Catholic Churches**
- Copper Country Community Arts Council**
- Copper Country Habitat for Humanity**
- Copper Country Humane Society**
- Copper Country Ski Tigers**
- Copper Country Suzuki Association**
- Copper Harbor Improvement Association**
- Copper Harbor Trails Club**
- Dial Help**
- Don't Do It Yourself (D.D.I.Y.)**
- Faith Lutheran Educational Resource**
- Gratiot Lake Conservancy**
- Houghton High School Alumni Association**
- Isle Royale and Keweenaw Parks Association**
- Keweenaw Community Foundation**
- Keweenaw County Historical Society**
- Keweenaw Economic Development Alliance**
- Keweenaw Family Resource Center**
- Keweenaw Heritage Center at St. Anne's**
- Keweenaw Land Trust**
- Keweenaw Unitarian Universalist Fellowship**
- Kiwanis – Nailbenders**
- Lake Superior Stewardship Initiative**
- Life Outreach Center**
- Little Brothers – Friends of the Elderly**
- Martha & Floyd Memorial Heart & Hands Society**
- Michigan Nature Association**
- Mont Ripley National Ski Patrol**
- North Woods Conservancy**
- Omega House**
- Portage Health Foundation**
- Portage Lake District Library**
- Portage Lake Little League**
- Portage Lake United Church**
- Richard and Ann Tieder Memorial Fund**
- Richard and June Ross Genealogy Fund**
- Ruth L. Sablich Charitable Fund**
- St. Vincent DePaul Friends-in-Need Fund**
- U.P. Kids**
- U.P. Wildlife Habitat Fund**

SCHOLARSHIP ENDOWMENTS

Established by individual donors or organizations, these endowments are created to provide encouragement and financial support to area youth who seek to pursue various educational goals at post-secondary educational institutions. You can invest your gift in our community's future and show students you care, all with the guidance and personal services of your community foundation. You determine the criteria students must meet to receive the Scholarship you establish. With your assistance, students achieve their academic and career-oriented goals—from preschool to postgraduate work.

B.F. Gaffney Memorial Scholarship
Faith Lutheran Church Scholarship
Houghton Rotary Scholarship
Anthony and Patricia Stark Scholarship
Portage Lake Gappy Golf League Scholarship
Ronald and Lou Ellyn Helman Scholarship

DONOR ADVISED FUNDS

This type of fund is established at the bequest of a donor wishing to provide flexible capital for charitable activities while retaining the ability to make annual grant recommendations to specific projects or interest areas. You work with our professional program staff, identifying ways to use dollars from the Donor Advised Fund you establish to address the issues and needs you care about most. Your recommendations are submitted to our local board for approval; we then distribute grant dollars.

Funding Youth Initiatives
Herman Gundlach Fund

FIELD OF INTEREST ENDOWMENTS

Created to provide annual support for grants targeted toward specific areas of community needs and interests, to meet changing conditions and/or enhance the quality of life in the Keweenaw. Arts. The Environment. Youth. Recreation. You identify your personal interest area when making your gift; our board awards grants to community organizations and programs that are making a difference in the area you select.

Copper Country Youth Hockey
Environmental
Houghton County Historical Preservation
Kellogg Youth
Keweenaw Cross Country Skiing
Portage Community Health
Portage Lake Youth

Ed Gray at his
potter's wheel in the
Calumet Art Center.

COMMUNITY IMPACT FUND

The most flexible vehicle for providing annual funding for a variety of community projects or programs dedicated to collaborative approaches designed to maintain or improve the quality of life in the greater Keweenaw area. Your gift can address ever-changing community needs—including future needs that often cannot be anticipated at the time your gift is made. We evaluate all aspects of community well-being—arts and culture, economic development, education, environment, health and human services, neighborhood revitalization, and more. The flexibility of your unrestricted gift enables your community foundation's program experts to respond to the community's most pressing needs, today and tomorrow.

SPECIAL COMMUNITY PROJECTS

Alive Inside
Brick Paver
Calumet Art Center Barrier Free Entrance Fund
Camp 911
City of Hancock – City Parks
Houghton Energy Efficiency Team
Houghton Skatepark
KCF Operations
KCF Youth Operations
Keweenaw Community Critical Stress Management
Establish a Fund in Your Name

Any of these funds can be established in your name, or in the name of your family, your organization, or anyone you wish to honor. All grants distributed from the fund you establish—today and in the future—are then awarded to charities in the name of that fund. It's a great way to always be involved with, and remembered for, your community investment.



Photo courtesy of Joe Kirkish

Planned Giving with KCF

This year, create a legacy for the community you love.

Gifts of Stocks and Bonds

Gifts of Real Estate

Gifts of Retirement Assets

Gifts of Cash

Gifts of Insurance

Planned Giving helps you meet your personal, financial and estate planning goals by making a lifetime or testamentary charitable gift. **Visit keweenawlegacy.org**

Giving to our cause can be done either directly or through a gift model that can provide tax benefits and even income. Ways to give—

Bequest

IRA Rollover

Beneficiary Designation Gifts

Charitable Gift Annuity

Charitable Remainder Unitrust

Charitable Remainder Annuity Trust

Charitable Lead Trust

Sale and Unitrust

Bargain Sale

Give It Twice Trust

Life Estate Reserved



KCF at a glance:

What? • Established in 1994 by and for the people of **Houghton and Keweenaw Counties**, we inspire giving that invests in our community's quality of life.

How? • We provide **sustainable financial support** to organizations for projects aimed at solving problems and enhancing life in our community.

Why? • To serve as a **catalyst for change**, a partner for other local organizations, and a resource for solutions to emerging community needs.

Who? • We are governed by a local, **diverse board of trustees** representing the community. The board is **advised by professionals** in fields such as finance, accounting, and law. We are supported by a **dedicated staff**, including Jim Vivian, Lisa Broemer, and Laura Smyth.

For good. For ever.™

KEWEENAW COMMUNITY FOUNDATION
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