



Grand Traverse Regional
COMMUNITY
FOUNDATION

better giving for
a better future.



2023
ANNUAL REPORT



**healthy.
resilient.
thriving.**

Land Acknowledgment.

The Grand Traverse Regional Community Foundation is located on the ancestral, traditional, and contemporary lands of the Anishinaabek, the Three Fires Confederacy—who are the Ojibwe, Odawa, and Bodawatomi—and all their relations. We acknowledge that this region has been home to the Anishinaabek, now known as the sovereign nation of the Grand Traverse Band of Ottawa and Chippewa Indians, since time immemorial.

We understand that the historic Treaties intended to reserve land for the local Anishinaabeg were not honored and that this land was unjustly taken from our Indigenous neighbors. The Community Foundation is committed to building deeper relationships with the Tribe and to supporting their priorities.



Everything we do is centered on leaving a lasting impact for our community, and everyone in it.

Dear Friends,

From stewarding donor-designated funds, scholarships, and flexible Community Funds to embracing collaborative leadership opportunities and innovative investment strategies, everything we do is centered on leaving a lasting impact for our community, and everyone in it.

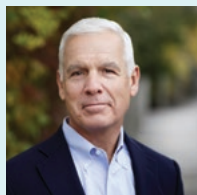
Reflecting on 2023, there are many examples of generosity at work, made possible by supporters like you. These highlights include:

- **Awarding \$3.5 million in grants and scholarships** to benefit students and nonprofit partners across the region, including \$530,000 to support student scholarships.
- **Hosting the Youth Wellness Initiative** through which local student researchers crafted a survey about youth mental health—taken by 530 students from 20 different area high schools—and developed 11 recommendations in response to their research findings. The students also collaborated with Interlochen Public Radio to produce Re:Frame of Mind, a podcast about teen mental health in Northern Michigan.
- **Participating in several advocacy efforts with the NWMI Community Development Coalition**, which the Foundation convenes, including supporting reforms to the Elliott Larsen Civil Rights Act to prevent discrimination in housing and employment based on a person’s gender identity or sexual orientation; supporting the expansion of the state Earned Income Tax Credit; and supporting funding for the Freshwater Research & Innovation Center and the Office of Rural Prosperity, among other efforts.
- **Securing a permanent home for the Foundation**, which has allowed us to significantly reduce our occupancy expenses, freeing up more dollars for community impact.

While this is just a sampling of the impact we’re creating together, it illustrates the immense power of collaboration. Thank you for the trust you place in us to be good stewards for greater impact.

With gratitude,

David Mengebier
President and CEO



Jerry Ring
Board Chair



YOUR SUPPORT GAVE
local children
EARLY CHILDHOOD
OPPORTUNITIES.



YOU HELPED BRING
COMMUNITY TOGETHER IN
Kalkaska.

YOUR GIVING
MEANT THE WORLD
TO STUDENTS LIKE
Matthew.





trusted giving partner.
sustainable resource.



Designed and built to be resilient and sustainable, we can effect change over time, and as times change. You can count on us to support our communities now and forever.

Leadership.

We are led by the expertise of our Board, with members from across our region, and the skill of our dedicated staff. We are committed to collaborative leadership and bringing cross-sector partners together to achieve transformative change in our region.

Trust.

With more than 30 years of experience, we are trusted stewards of resources for our communities. We invest and direct funds responsibly and use assets to leverage other resources for greater impact.

Better Giving.

We are a leader in assessing local needs and impact and use a holistic approach to responding to community needs. We see the inter-connectedness of issues and have the flexibility to adapt in response to those issues.

Lasting Impact.

Giving through the Community Foundation is a strategic, long-term investment in our region. Through our endowment and asset management approach, our community's assets can award ongoing grants, building the vitality of our region for generations.

Collaboration.

We use a highly collaborative approach to identify grant partnerships that address our communities' greatest needs and leverage our region's most promising opportunities.

Best Practices.

We steward resources for the sole benefit of our communities, and we are National Standards certified, meeting the highest standards for community foundations.

supporting a brighter future *for all.*



Immigration Law & Justice Michigan (ILJ-MI), a Diversity Equity Inclusion (DEI) Fund grant partner, strives to assist immigrants, refugees, and asylum seekers as they navigate our country's complicated immigration process.

"Immigration attorneys are relatively rare in Michigan, and there are no organizations other than ILJ-MI that provide free immigration legal services north of Grand Rapids," shared Alline Beuter, ILJ-MI Community Relations Manager. "Our area is underserved, and many people need pro bono immigration legal services in Northern Michigan."

For more than a decade, ILJ-MI has helped countless clients—including people running from political oppression, ethnic cleansing, religious persecution, domestic violence, starvation, and war—in obtaining work permits, green cards, and temporary status so they may remain in the U.S., apply for jobs, and remain with family members already here.

Lives are changed every day through ILJ-MI's efforts and when donor partners invest in the Community Foundation. Together, we are supporting further growth and reach for ILJ-MI.

"The funding provided through the Community Foundation's DEI Fund has allowed us to increase our capacity to serve more people in need of immigration legal services in the Grand Traverse region," said Alline.

As the saying goes, a rising tide lifts all boats. Partnering with organizations that work directly with our most marginalized community members means that we're supporting a brighter future for everyone in our region.



Photo Credits: MI Farm Co-Op

collaborating for *greater impact.*

Impact investing is one of the tools we use to infuse more funding into our communities beyond grant dollars. It allows us to invest in local businesses and support the small business economy that drives our region.

We're proud to collaborate with Venture North Funding & Development as one of our community development financial institution partners to make our impact investing strategy a reality.

Since 2022, our partnership with Venture North has resulted in six loans to local businesses, totaling \$512,850. One of the benefiting businesses is MI Farm Co-Op, an independent, producer-owned cooperative of 25 small-to-mid-sized family farms.

MI Farm Co-Op received a \$250,000 USDA Rural Development grant to expand to a new aggregation facility. However, the grant was awarded on a reimbursement basis. That's when Venture North stepped in with funds from our impact investing pool, providing a \$20,000 bridge loan to cover the initial phase of the Co-Op's expansion.

"We were delighted to deploy new funds from the Community Foundation," said Laura Galbraith, President of Venture North. "Many state and federal grants now award funds on a reimbursement basis, and many small organizations simply don't have the reserve capital to pay the bills while awaiting the first reimbursement."

By working with Venture North, we are growing our community impact in new ways, supporting the important endeavors of local entrepreneurs, farmers, and small businesses like the Co-Op. Collaboration is exactly what makes this type of shared, responsive impact possible.

leveraging resources *beyond grantmaking.*

To implement our impact investing strategy, our community development financial institution partners—including Venture North, Northern Initiatives, and IFF—employ the Northwest Michigan Community Development Coalition's Regional Scorecard. This Scorecard features shared metrics that track progress toward each community economic, societal, and environmental goal, with specific targets for improvement by 2030.

Together with our Coalition partners—including 40 nonprofit, governmental, and business organizations—we're working to make an impact on these goals, from attainable housing and youth mental health to school readiness and reducing carbon emissions.

Both our impact investing efforts and those we pursue alongside Coalition partners allow us to support the overall growth, prosperity, and sustainability of our local communities. It's how we're leveraging resources beyond grantmaking to make a lasting impact.



To learn more and view progress, visit:
nwmcommunitydevelopment.org.

better together
better for all.





engaging our community's *next generation.*

We believe the act of giving strengthens communities by fostering collaboration, empowering people, providing solutions, and sharing resources with every gift.

That's why we're committed to engaging local high school students across our region through our Youth Advisory Council (YAC) program.

In 2023, 81 students from across the region participated in YAC, collectively awarding \$91,000 to 26 nonprofit partners serving local youth.

Partnering with young people as leaders means we can together create a lasting impact and promote a culture of generosity that inspires others to get involved.

"I really enjoyed YAC because it broadened my horizons on local culture. I am definitely more aware of the community, and more involved too."

- Jack Sperry, Grand Traverse County



"YAC provides many opportunities to help students improve their leadership skills, further their decision-making skills, and so much more. YAC is valuable to both the students that participate and the communities it serves."

-Coltrane Paryani, Kalkaska County

FIRST YEAR MEMBERS SHARE THEIR experiences.

"I am so grateful that I've gotten to be part of YAC. I learned a lot about organizations that are helping teens in our community."

-Amabel Schwager, Leelanau County





leaving a legacy
by giving back.

After John and Rebecca Bercini moved from Chicago to Northern Michigan in 2013, they dove into their new community with great interest, becoming involved with various organizations.

“I never really thought about giving back until we moved up here,” shared Rebecca. “And that was a life-changing event for me. It gave me the opportunity to think about doing something more meaningful for the rest of my life.”

Their community involvement eventually drew them to the Community Foundation. While neither John nor Rebecca were born into particularly philanthropic families, planning for the future and doing their part to impact their community is important to them.

Recognizing the pressing needs in our region, the Bercinis took action to create a “forever gift,” as John called it, by joining our Community Guardian Legacy Society.

“It’s important to support community foundations because they really understand the community and the problems we’re facing,” added John. “They have the ability to mobilize quickly and address local needs.”

By being active within their local community and becoming Legacy Society members, the Bercinis are fulfilling not only their desire to give back today, but also to support the future of this region they love and call home.

“A legacy is a connection across time... it enables us to continue the mission of those who came before us and those who are coming in next.”

-Rebecca Bercini, Donor Partner and Community Guardian

Our Community Guardian Legacy Society is made up of community-minded individuals and couples who are dedicated to making a long-term investment in our region through a legacy gift.

We’re deeply grateful to our Legacy Society members for entrusting us to steward their giving so that future generations benefit from their generosity.

Community Guardian Legacy Society Members

- | | | |
|--|-------------------------------------|---|
| Anonymous (8) | James C. Gurd * | Cleo M. Purdy * |
| Ed and Mary Arbut | Marie Drucka Guyton * | Daniel Remahl |
| Tom and Barbara Auer | Chip and Laura Hansen | Connie Riopelle * |
| Leila and Owen Bahle * | Robert and Natalie Hansen * | Gordon H. Robertson * |
| Patrick J. Barry Jr. and Cheryl L. Barry | Martha and John Hicks | Marvin and Luella Rorick * |
| Teresa Beamsley | Carolyn Hoagland * | George T. and Barbara W. Schilling* |
| Phillip Begley * | Kenneth F. and Elizabeth A. James * | Bill and Mary Smith |
| John and Rebecca Bercini | Bennie M. Kline * | Mark and Susan Smith |
| Gordon V. Brown * | Edith A. Krause * | Thomas D. Streeter * |
| Elisabeth W. Case * | Will and Joan Larson * | Kenneth Taylor, D.O. * |
| Steve and Hallie Christian | Rebecca MacKay * | Cecil and Kris Thomas |
| Chuck Cigrand and Sallie Thompson | Emer A. Mathias * | Ann Torrey * |
| Elaine Cluff * | Nancy and Phil Meek | Kathy Tuckerman |
| Jean and Gordon Cornwell * | Thomas F. Menzel | Lars C. Wigert |
| Robert A. and Arlene V. Dean | Larry and Joan Miller * | Helena G. Wilkening * |
| Shirley Denman * | Helen and Gov. William Milliken * | Richard and Kimiko Williams |
| Helen Wolfe Dewey * | Richard and Virginia Mouch | Joan and Willard Wolfe* |
| Clifford Domke * | Ruth Luse Myers * | Dick and Kathy Woods |
| Phil Ellis | Richard and Clarine Olson * | Cathie Ann-Frederick Worden |
| William C. Engle * | Dr. Daniel Palmer | Lucille and Harlan Yeager * |
| Becky Ewing and Bob Eichenlaub | Joey and Bill Parris | Robert and Pauline Young |
| Richard A. Grout | Gladys Pascoe * | Kris A. Sheffer-Zimmerman and J. Eric Zimmerman, M.D. |
| | Nannette and Morton Peterson * | |

* Indicates donors whose gift has been realized.



Collective Giving.



Meaningful Granting.



Lasting Impact.

Magic happens when we partner with hardworking, passionate organizations, donors, and community members like you. Take the impact made possible through our Community Funds as a prime example.

Together with donor support, we awarded nearly \$240,000 in Community Funds grants to 14 organizations across our region in 2023. As a collection of flexible, responsive assets, our Community Funds allow us to support all types of organizations and address gaps that our other funds cannot.

One of the organizations we were fortunate to partner with through our most recent Community Funds grantmaking cycle was Northwest Michigan Arts & Culture Network. With their Community Funds grant, the Network received flexible operating support for capacity-building, directly aiding the organization's ability to build an even more vibrant and creative Northern Michigan community.

"We are honored and humbled by the Foundation and its faith in the Network and support for our arts and culture community," shared Mary Bevans Gillett, Network Executive Director. "With gratitude, you have given us great hope for our future and renewed commitment to create the impact we all want to achieve to benefit the region and our creative sector."

Grant awards like this wouldn't be possible without the collective generosity of individual community members, such as from our long-time supporters, Mack and Lorraine Beers.

The Beers recognize how Community Funds can meet various needs across our region, including by providing general operating support to arts and culture partners, which amplifies an organization's ability to carry out its mission and programs.

"The beauty of our region is enhanced by a strong cultural network. Through music, performing arts, and the work of innovative artists, we can celebrate our environment and the people who live here," said the Beers. "We appreciate that the Community Foundation's grant to the Network will support these efforts."

Network member Amanda Kik, who is the Co-Founder and Co-Director of Crosshatch Center for Art & Ecology, also sees the Network as an invaluable community asset.

"The arts improve our mental health and bring us together, and the arts need advocates. The more the Network grows, the more we can support our region's artists and the arts," shared Amanda. "When the arts thrive, we all benefit."

Through collaborative efforts like those between us, the Network, the Beers, and other supporters, we can make a lasting impact on our region. That's the power of collective giving and meaningful granting through Community Funds.

together, we can all thrive.



thriving communities,
forever.

We believe in the power of generosity to do great things. When we come together for our community, anything's possible.

So, let's keep the momentum going. Partner with us to support a region of healthy, resilient, thriving communities for all.

Make your lasting impact today—
and for generations to come.



thank you for giving.

3 Sisters Foundation
5Loaves2Fish NMI
Ward Abbey
Advanced Office Supply & Printing
Suzanne Albrecht
Alden Muffin Tin
Hope Alexander
All Seasons Resort
Jason Allen and Suzanne Miller Allen
Maurie and Betsy Allen
AAUW-TC
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Andy and Erica Chadwick and Family
Helen Chadwick
Robert and Susan Chapman
Charlevoix County Community Foundation
Gary Chenoweth



“The Community Foundation has a wide-ranging impact in our region. The Foundation quietly goes about contributing to major changes in Northern Michigan without great fanfare or acknowledgment. It’s great to be involved.”

*—Rick Heitmeyer,
Board Director,
Kalkaska County*

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The Chiropractic Center
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Lisa Gorman Evans
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Mark Eyet
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Jeff Fitch
Fitzpatrick Insurance
Paul and Charlene Fitzpatrick
Eric Flegenheimer
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Flynn Ford
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Lois Roper Forrester
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 Kelsey Fox
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 Julia Freiburger and Vic Milla
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 Bill Kelly



"I have always believed it is important to give back to the community. Our region has many impactful organizations and initiatives in need of support. Being a board member of the Community Foundation allows me to contribute to the broader community."

-Phyllis Kladder,
 Board Director, Benzie County

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 Virginia Mouch

"The Community Foundation offers a variety of critical opportunities to broadly support our region, which I greatly value. This type of support is very important because it allows funds to go where they're needed most."

-Edward Lanphier,
 Board Director,
 Leelanau County



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 George Seifried
 Rosalind Sell
 Ashlee and Nicholas Send
 Sumit Sengupta and Cassie Brooks
 Kellie Sergent
 Shannon Family Foundation
 Patricia Sharpnack
 Sheren Plumbing & Heating, Inc.
 Short's Brewing Company
 Carol Silverman
 Rodger and Patricia Simmons
 and Family
 Dudley and Kim Smith
 Jeff and Kristen Smith Charitable Fund
 Smith Property Investments, LLC
 Alton and Kathy Smith
 Donald and Melinda Smith
 Drs. Mark and Ann Smith
 Bill and Mary Smith
 Marsha Smith and Thomas Gilbert
 Trenton and Michelle Smith
 Paul and Maureen Smyth
 David K. Sneed
 Dr. Peter and Kristin Sneed
 John Snow
 John and Bonnie Sonnemann
 Phil Spangenberg
 Brad and Jandy Sprouse
 Stacy (White) Srivastava
 Stephen H. and Penny K. Staelin Fund
 Steve and Penny Staelin
 Julie Stalla
 Lynn Ann Stam
 Stanifer Family Donor Advised Fund
 State Farm Companies Foundation
 Donna Statler
 Jeffrey Steigerwald Charitable Fund
 Thomas Stephenson
 Jim Stevens
 Michelle Stevenson
 Ann Strehle and Barb Skurdall
 Charitable Gift Fund
 Don Surber
 Penny Schubert Sweeney
 Dan and Nancy Sweeney
 John Sznawajs
 Bob Tarkington
 Tate's Auto Body Specialist, Inc.
 Christopher and Margaret Tatum



“Being a part of the Community Foundation and witnessing the positive impact that they have on people’s lives first-hand has inspired me to be who I am today. I stay involved with the Foundation because I believe that it is an essential part of our communities.”

–Jürgen Griswold,
 Board Director,
 Antrim County

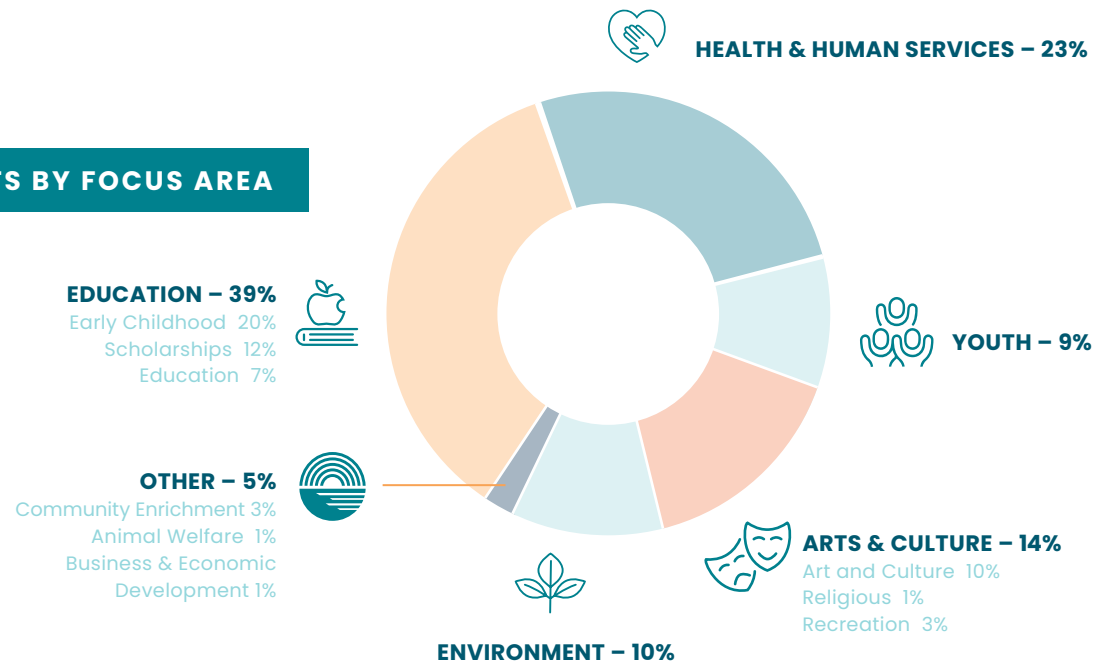
Nancy Temple
 David and Pamela Thelen
 Kris and Cecil Thomas
 Robert E. Thomas
 Thompson Surgical Instruments, Inc.
 Gina and Ryan Thornbury
 Denny and Kathy Tilley
 Tom River Properties LLC
 Traverse City Administrators Association
 Traverse City Area Public Schools
 Traverse City Music Boosters
 Traverse City West Titan Athletic Boosters
 Traverse Connect
 Roger and Shelley Traverso
 Trinidad Resort & Club LLC.
 Lisa M. Trombley
 Tom and Sue Trumbull
 Richard and Anne Tryon
 Kathy Tuckerman
 Gerhild Uhl
 Randy and Sarah Uren
 USAA
 USS Indianapolis CA-35
 Survivors Organization
 Howie and Trish Van Houten
 Sharon Vance
 Joey Vanderbosch
 Mark and Robin Vanderkaay
 Juli VanEenaam
 Marti VanEenaam-Iwanicki
 and Tom Iwanicki
 William and Susan VanKirk
 John and Sara VanWagoner
 Jo Vaughan
 Dean and Sharon Veliquette
 Norm Veliquette and Judy Brummeler
 John and Lynn Vinkemulder
 Karen Viskochil
 Kevin Vlach
 Jane and Mark Voight
 Jill and Tim Vollbrecht
 Suzy Voltz
 M E Voss
 Angelo Vozza
 Steve and Linda Wade
 Dick and Mary Walker
 Dr. David and Becky Walker
 Scott and Polly Walker
 Christine Walter
 Nancy and Kent Walton
 Steve Walton
 Dan and Sharon Watkins
 James and Pauline Weaver
 Cathy Webb
 Peter and Nancy Weir
 Bradley Weller

Thomas B. Wells
 Susan Wenzlick
 Becky Wesley
 Bob and Mary Weyand
 Whistling Frog Tile
 Jennifer Tolle Whiteside
 Katie Wibby and Nick Carpenter
 Tom and Nancy Wideman
 Susan Widman
 Helena and Orlie Wilkening Fund -
 St. Louis Comm. Found.
 Kenneth Williams
 Tommy Williams
 Ronald T. Williamson
 Wilson Kester, PLC
 Frank Winders
 Michael Winter
 Tom and Susan Wischman
 Douglas Wisniewski
 Bill and Rita Witler
 Peter and Ginna Woessner
 Woodland Creek Furniture
 Kathy Woods
 Randy and Joan Woods
 Wayne and Sharon Workman
 Helen Wransky
 Katie Wright
 Pam Yee and Ron Gianola
 Dr. John and Peggy Zachman
 Stan Zisherl
 Al Zimmerman
 Frank and Ruth Zinn
 Kristin Zlotnik

Contributions from GTRCF Funds

Lawrence and Susan Burks
 Family Endowment
 Hoensheid Family Fund
 Wilfred and Joan Larson Endowment
 Margery May Family Endowment Fund
 Larry and Joan Miller Endowment
 John and Carolyn Olson Fund
 Rotary Endowment
 Robert and Pauline Young
 Family Endowment

GRANTS BY FOCUS AREA



ASSETS

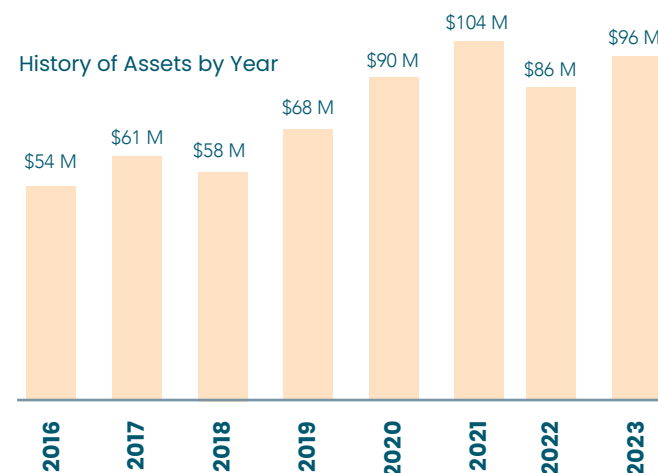
2023 Assets = \$96 M

2023 Designated Assets \$91.4M

Designated assets have a specific area of focus or benefit, such as scholarships or grants for designated organizations.

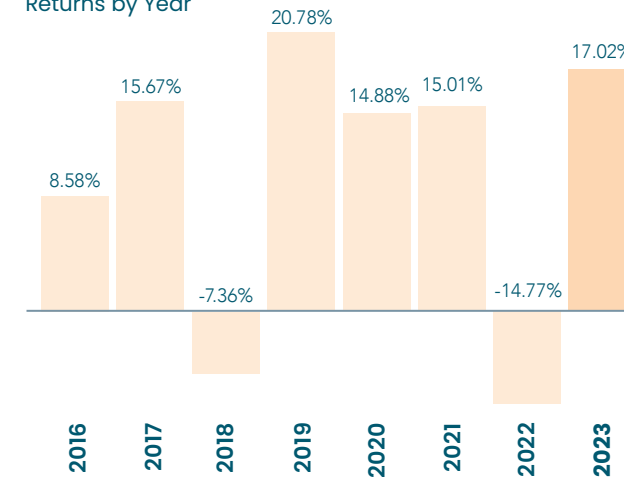
2023 Community Fund Assets \$4.6M

Community Fund assets are responsive and flexible resources to meet areas of greatest need.

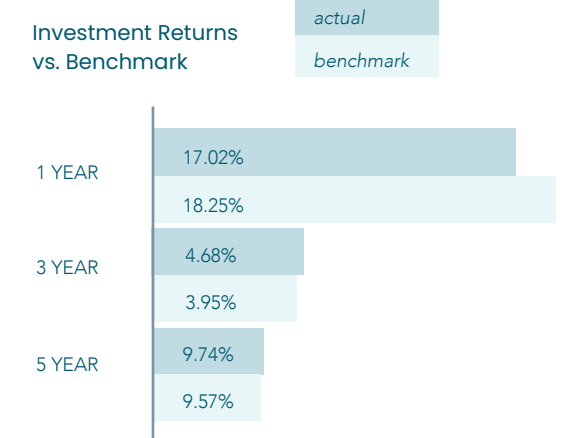


INVESTMENTS

Endowment Investment Returns by Year



Investment Returns vs. Benchmark

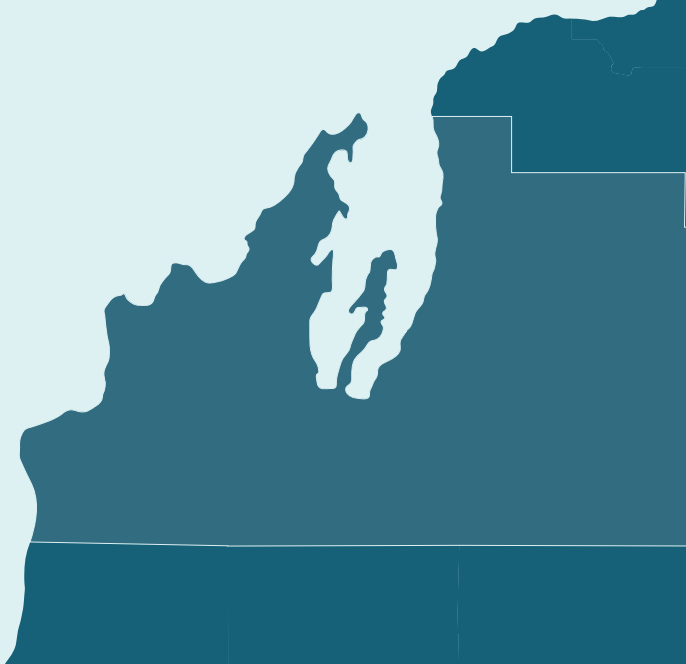


The benchmark consists of investments that mirror our portfolio, allowing us to assess the relative performance of our own investment portfolio against it.

STATEMENT OF ACTIVITIES

	2023	2022
Net Assets	\$86,156,562	\$104,074,466
<i>beginning of year</i>		
Endowment Gifts	\$ 689,112	\$ 820,639
Non-Endowment Gifts	\$ 571,576	\$ 782,857
Total Gifts	\$ 1,260,688	\$ 1,603,496
Investment & Other Income	\$ 3,586,292	\$ 3,352,720
Unrealized Market Gain or (Loss)	\$ 10,140,328	\$ -18,012,782
Total Revenue	\$14,987,308	-\$13,056,567
Endowment Grants	\$ 2,891,046	\$ 2,762,705
Non-Endowment Grants	\$ 663,943	\$ 678,293
Total Grants	\$ 3,554,989	\$ 3,440,998
Operating Expenses	\$ 1,462,309	\$ 1,283,195
Other Expenses*	\$ 99,411	\$ 137,146
Total Grants & Expenses	\$ 5,116,709	\$ 4,861,338
Net Assets	\$ 96,027,161	\$86,156,562
<i>end of the year</i>		

*includes depreciation expense new in 2023



Board Officers

Jerry Ring, Chair, Grand Traverse County
Laura Asiala, Vice-Chair, Antrim County
Cash Cook, Secretary, Kalkaska County
Beth Dunckel, Treasurer, Grand Traverse County

Board of Directors

ANTRIM COUNTY

Laura Asiala
Jürgen Griswold*
Mark Irwin
Barbara Matthews
Dan Phillips
Royce Ragland

BENZIE COUNTY

Megan Royle Carrella
Elise Crafts
Laris Galejs
Phyllis Kladder
Chris MacInnes
Carol Marsh
Ann Strehle

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John Bercini
Annie DeVries
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Damian Lockhart
Jerry Ring

KALKASKA COUNTY

Rachael Birgy
Lauren Clark
Cash Cook
Andi Halpin
Rick Heitmeyer
Cari Jo Roberts

LEELANAU COUNTY

Terry Beamsley
Marshall Collins
JoAnne Cook
Kira Davis
Edward Lanphier
Ranve Martinson
Larry Nelson

Additionally, thank you to the following community members for their years of service on the Board:

Sara Brubaker
Marty Colburn
Dennis Pearsall
Amy Schindler
Bill Smith

Board List as of January 2024
*Youth Representative



The Community Foundation Team



Staff (listed in order of photo, from left to right)

Paul Kester, Vice President of Finance & Administration
Alison Metiva, Chief Operating Officer
Torey Caviston, Youth & Community Impact Coordinator
David Mengebier, President & CEO
Gina Thornbury, Senior Community Impact Manager
Mercedes Bowyer, Donor Engagement Director
Pam Amundsen, Donor Services Manager
Joan Hughes, Administrative Donor Support Services Associate
Steve Wade, Vice President of Community Impact
Brittany Morton-Smith, Operations & Grants Coordinator
Kristina Pepelko, Communications Manager

Annual Report Credits

Design – Brand Tonic

Copywriting Support – Alex Dailey of Writing Dailey

Story Contributors – Mack and Lorraine Beers, John and Rebecca Bercini, Immigration Law & Justice Michigan, Venture North Funding & Development, Youth Advisory Council Leadership Team

Photography – Courtney Kent Photography (unless otherwise noted)



Grand Traverse Regional
COMMUNITY
FOUNDATION

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TRAVERSE CITY, MI 49684

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ACCREDITED
FOUNDATION



together,
we all thrive.



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create a plan for a
future gift.

We look forward to
connecting with you!

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