2009 Annual Report



LENAWEE COMMUNITY FOUNDATION



DREAMS



Dreams, Gifts, Legacies

The Lenawee Community Foundation assists individuals, businesses, and organizations in achieving their charitable goals for our community.

You can:

- Address health, civic, culture, education, or social service needs.
- Utilize a wide variety of giving options and receive maximum tax benefits now or through your estate plan.
- Benefit from the Foundation's personalized service, local expertise, and community leadership.
- Make gifts that last for good for ever.



community foundation[™] For good. For ever.[™]

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Mission

The mission of the Lenawee Community Foundation is to enhance the quality of life of the citizens of Lenawee County, Michigan through permanent endowments by:

- Identifying and addressing current and anticipated community needs, and
- Raising, managing, and distributing the funds for charitable purposes in the areas of civic, cultural, health, educational, and social services.



"Your grant will continue to provide our students and community with a lifelong gift." Jeya Carmichael, Adrian Middle School 5-6

Message From the Chair of the Board and President & CEO

In the classic children's book, The Little Engine that Could, a train had a goal of carrying wonderful things to boys and girls on the other side of the mountain. Despite some challenges, eventually a little blue engine came along to help with an "I think I can" attitude, and the goal was accomplished.

The Lenawee Community Foundation began with a goal – our mission – to improve the guality of life for Lenawee citizens. Even though there have been some challenges along the way, we are blessed with a great Board of Directors with a "can do" spirit, donors who believe in the work we do, and numerous individuals and organizations that partner with us.

The Lenawee Community Foundation 2008-2009 fiscal year was exciting as we assisted individuals, businesses, and organizations in achieving their charitable goals for our community. Despite a challenging economy, the Foundation:

- •Distributed \$1.4 million in grants and scholarships 65% more than the previous year.
- Provided Extreme Community Makeover Grants to seven area communities, plus matched \$5,000 in gifts to 5 area communities with \$5,000 grants, bringing funds for specific communities to more than \$4.8 million.
- •Kept operating expenses to only 1.8% of total assets, plus over 93% of our expenses were for programs.
- Achieved short-term investment returns that exceeded their benchmarks by 310 basis points, while longterm returns achieved results 70 basis points above the benchmarks.
- Received a second-year Volunteer Centers of Michigan grant for VOLUNTEER Lenawee! and an AmeriCorps*VISTA full-time volunteer to strengthen our volunteer center.
- •Initiated the Imagination Library, a program that delivers a new book each month to children ages 0 to 5. The first book that each child receives is The Little Engine that Could.

Scholarships and grants in the areas of civic, cultural, health, education, and social services helped to: feed hungry people, build wheelchair ramps, beautify local towns, assist unemployed persons, offer youth career exploration, create a women's health center, provide affordable housing, support veterans, give college scholarships, shelter women and children from domestic violence, support the arts, provide youth programs, and more.

The Lenawee Community Foundation is The Community Foundation that Could. We invite you to read about our efforts that have made Lenawee a better place, and join us in making Lenawee even better. As the only nonprofit working primarily for the future of Lenawee, you can climb aboard this engine that is a major force for good for ever. We invite you to consider leaving a legacy to your community. However you wish to make our community better, the Lenawee Community Foundation is ready to assist you in making your goals a reality. We know we can!

Sincerely,



David & Dixm Suam Detterment

David S. Hickman Chair of the Board

Suann D. Hammersmith President & CEO



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

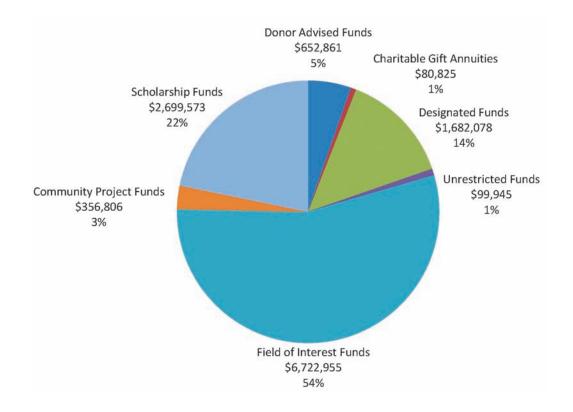
Funds within the Lenawee Community Foundation

Existing funds may be utilized for gifts, or donors may establish new funds in the Lenawee Community Foundation. Funds are categorized in seven areas: Lenawee, Lenawee Leadership, Field of Interest, Donor Advised, Designated, Lenawee Community Projects, and Scholarships.

There are several ways to establish funds to meet the charitable interests and financial circumstances of individuals, businesses, and organizations. A commitment of \$10,000 is required to establish a fund, however gifts in any amount are accepted for existing funds.

A named fund can be established in your name, a business or organization name, the name of a person you wish to honor, or the name of a person for whom you wish to create a lasting memory.

Lenawee Community Foundation Fund Values by Fund Type



Following is a description of each type of fund and a list of the funds. *In addition to federal tax deductions, Michigan taxpayers receive state tax credits* for gifts to endowed funds in community foundations. Endowed funds are those which invest gifts permanently, while utilizing the earnings for grants.

Each fund marked with an asterisk () is endowed and qualifies for the Michigan Tax Credit.* For additional information on tax benefits, see page 9.



Lenawee Fund

The Lenawee Fund is a multi-purpose, flexible, endowed fund to meet current and emerging needs. Donors may choose the Lenawee Fund if they believe that a group of living individuals will always be better able to assess current situations than a document from the past. This fund is designed to meet emerging needs,

respond to change, create innovative approaches, and enhance the quality of life in Lenawee County. After the Lenawee Community Foundation Board of Directors evaluates all aspects of community well-being, grants are given by the Lenawee Community Foundation Board to areas of greatest need.

*Lenawee Fund

*Ralph & Hazel Leonard Charitable Fund

Lenawee Leadership Funds

These non-endowed funds have been established to provide support for current community needs, or support for the Lenawee Community Foundation's administration or leadership role in the Lenawee County community. Disbursements are made by the Community Foundation Board.

Bernice, Harry & Marda Gene Duncan Fund Ralph F. Helzerman, M.D. Unrestricted Fund Graham and Fran Foster Fund Lenawee Community Foundation Fund

Field of Interest Funds

A Field of Interest Fund allows a donor to support a broad area, such as health, youth, the arts, services to seniors, economic development, or whatever charitable issue the donor chooses. Donors may also support their home community, where local advisory committees make recommendations for grants. A personal interest area is identified when the gift is made, and then the Lenawee Community Foundation Board of Directors makes grants to community agencies and programs that are making a difference in the area that has been selected.

*Addison Area Fund	*Ralph F. Helzerman, M.D. Endowment Fund
*Adrian Area Fund	*Herrick Endowment Fund
*Blissfield Area Fund	*Hudson Area Fund
*Britton-Macon Area Fund	*Kellogg Youth Fund
*Clinton Area Fund	*V.C. & Velma Knight Memorial Fund
*Cultural Endowment Fund	*Morenci Area Fund
*Deerfield Area Fund	*Onsted Area Fund
*Early Childhood Development Fund	*George W. Romney Fund for Volunteerism
*Patrick Gill Empty Bowls Fund	*Sand Creek Area Fund
*Health Endowment Fund	*Ruth V. & Ruth Anne Thompson Fund
*Healthy Youth Healthy Seniors Fund	*Youth Endowment Fund

"A gift from the heart is the greatest gift of all. We are very grateful to have a partnership with you and appreciate your continued generous support of Herrick Medical Center. This project would not have been possible without your lead gift towards the Women's Health Center. Your continued advocacy and leadership is paramount to the future of ensuring all women access to healthcare services."

Terrí Butler, Herríck Medícal Center Foundation



"Your belief in our work strengthens our dedication to

our families. The work of

Hospice is not possible without

Funds within the Lenawee Community Foundation (continued)

Donor Advised Funds

f A Donor Advised Fund allows the donor to have ongoing involvement in the use of gifts. Donors share insights and make recommendations regarding potential grant recipients. The donor's suggestions must be reviewed and approved by the Community Foundation Board. A Donor Advised Fund acts much like a private foundation, however, it is easier to establish, less expensive to operate, and less restrictive in distributions, payout amounts, and investments.

Brazeway, Inc. Fund Dr. Carlton and Lynn Cook Charitable Fund Frank & Shirley S. Dick Endowment Fund Downing Family Charitable Fund *Ernest & Susan Groeb Charitable Fund

*Hardwoods of Michigan Fund *Scott & Cynthia Hill Charitable Fund Maxwell Family Fund *James J. Robideau Memorial Fund The Brenda Ross Fund

Designated Funds

A Designated Fund allows contributors to specify charities as the recipients of their gifts, thereby providing those organizations with a perpetual stream of income from the fund. Nonprofit organizations may also establish designated, endowed funds with the investment earnings distributed back to the nonprofit.

*Adrian Schools Excellence in Teaching and Mentoring Fund *Adrian Symphony Orchestra Endowment Fund

*Blissfield Foundation for Educational Excellence Fund

*Britton-Macon Area School Endowment Fund

*Catholic Charities of Lenawee Endowment Fund

*Clinton Community Schools Endowment Fund

*Communities in Schools of the Tecumseh Area Endowment Fund

*Community Action Agency Endowment Fund

*Grandma Dull's Kindergarten Fund

*Goodwill Industries of Southeastern Michigan Endowment Fund

*David & Shelley Hickman Endowment Fund for the Lenawee Community Foundation

*Robert & Marjorie Hodapp Fund

*HOPE Community Center Endowment Fund

*Lenawee Community Mental Health Authority Endowment Fund

*Lenawee County Education Foundation Endowment Fund

*Lenawee County Fair & Event Grounds Fund

*Madison School District Endowment Fund

*Onsted Community Schools Endowment Fund

*Raisin Valley Land Trust Endowment Fund

*Sand Creek Community Schools Endowment Fund

*Tecumseh Center for the Arts Endowment Fund

*Tecumseh District Library Endowment Fund

*Tecumseh Schools Endowment Fund

*Robert & Albert Ward Todd Endowment

*YMCA of Lenawee Endowment Fund





the support of our community." Bill Kenyon, Hospice of Lenawee

Community Project Funds

These non-endowed funds support temporary or special projects in Lenawee County such as parks, recreational facilities, youth programs, or special events.

Adrian Area Chamber of Commerce Fund Adrian Inter-Club Council Fund Alexander Playground Fund Athena Aid Fund Athena Lenawee Fund Bear's Lair Playground Fund Blissfield Center for the Arts Fund Blissfield Community Playground Fund Blissfield Scout Cabin Fund Blissfield Skateboard Park Fund Boys and Girls Club of Lenawee Student Assistance Fund The Breast Cancer Awareness Fund Britton-Macon Area School Capital Projects Fund Children's Museum of Lenawee Fund Community Arts of Tecumseh Fund **Deerfield American Legion Fund Disabled American Veterans Fund** Friends of Tecumseh Schools Orchestra Fund Imagination Library Fund Greater Adrian Economic Development Fund Lenawee County Human Services Council Fund Lenawee Great Start Fund Madison Community Summer Softball Club Fund Bradford & Bronson Mansfield Memorial Golf Tournament Fund Mirelez Living Legacy Music Scholarship Fund North Morenci School Fund Rotary Club of Adrian Morning Fund Sutton School Fund Tecumseh Historic Carnegie Library Fund **Tecumseh Pops Orchestra Fund** Zonta Service Fund "Saving our resources and taking action to keep our planet beautiful is something we all need to do. Thank you for the generous grant toward our efforts."

> The Earth Day Committee, Blissfield Chamber of Commerce







Funds within the Lenawee Community Foundation (continued)

Scholarship Funds

Scholarship Funds enhance education by providing scholarships. Scholarships can support nonprofit preschool through high school education, or further the education of graduates of a particular high school, students in a specified field of study, students meeting specific criteria, or students enrolled in a chosen institution.

For application information, see contacts listed with each scholarship.

*Florence Bridleman Scholarship Fund

Britton-Macon Area School

- General Scholarship Fund
- *Golden Apple Scholarship Fund
- *Sam Hamilton Scholarship Fund
- *Shirley Todd Herrick Scholarship Fund
- *Charles Komon Memorial Scholarship Fund
- *Mary & Joseph Kormos Memorial Scholarship Fund
- *Peter Krzyzewski Memorial Scholarship Fund
- *Max Larsen Scholarship Fund
- *Amanda Stevens Scholarship Fund
- *Joan Downing Wood Scholarship Fund

*Citizens Gas Scholarship Fund

Clinton Community Schools

- *Danelle's Scholarship Fund
- *Robison Scholarship Fund
- *Truesdale/York Scholarship Fund
- *Willard D. Van Tuyle & Mary K. Van Tuyle Scholarship Fund

*Bernice, Harry & Marda Gene Duncan Scholarship Fund

*Kindinger Scholarship Fund

*Bertha LaPointe Scholarship Fund

Lenawee County Education Foundation

www.lisd.us/Scholarships/index.aspx

- *Adrian Women's Club Thelma Swigert Memorial Scholarship Fund
- *Eric Brandeberry Memorial College Scholarship Fund
- *Ward Bush Scholarship Fund
- *Jacqueline Long Carson Scholarship Fund
- *Lucy Wolcott Barnum Chapter D.A.R. Scholarship Fund
- *Fab 4 Scholarship Fund
- *Fairfield Chapter #224 OES, Thelma Swigert Memorial Scholarship Fund
- *Fleur de Lis Scholarship Fund
- *Francoeur Scholarship Fund
- *Richard Germond Scholarship Fund
- *Patricia & Joseph Koszka Memorial Scholarship Fund
- *Lawn Family Scholarship Fund
- *Lenawee County Association of Realtors Scholarship Fund

Adrian High Counseling Office, 517.266.4532 Chuck Pelham, 517.451.4581



Paula Trentman, 517.424.6569 David Pray, 517.456.6501

Paula Trentman, 517.424.6569

Carolyn Bloodworth, 517.788.0432

Kerry Hamilton-Smith, 517.424.7318

Janet McDowell, 517.265.1626



LENAWEE COMMUNITY FOUNDATION

Scholarship Funds

Lenawee County Education Foundation (continued)

- *Matthew D. Lips Memorial Scholarship Fund
- *Bradford and Bronson Mansfield Scholarship Fund
- *Rex and Mary Martin Scholarship Fund
- *Pauline and Sebastian Pizaña Memorial Scholarship Fund
- *Poppink Scholarship Fund
- *Porter Scholarship Fund
- *Lloyd W. Ruesink Memorial Scholarship Fund
- *Stubnitz Scholarship Fund Arts
- *Stubnitz Scholarship Fund Engineering
- *John Wyatt Sr. Memorial Community Service Scholarship Fund
- *Joan and Lysle Yeutter Scholarship Fund

*Jack & Edith Ries Memorial Scholarship Fund

M&S Foundation Fund

*Otto & Marian Meier Scholarship Fund

Sand Creek Community Schools

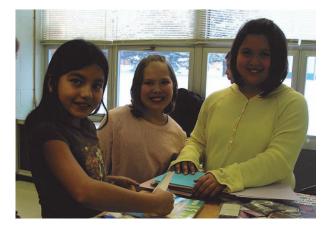
- *Bailey/Ries Memorial Scholarship Fund
- *Harley & Velma Benfield Scholarship Fund
- *Leland C. & Mary E. Buckles Memorial Scholarship Fund
- *John T. Kennan Memorial Scholarship Fund
- *Sand Creek Communications Scholarship Fund

*Alvin & Clara Schwab Scholarship Fund

*Tecumseh Area Soccer Club Scholarship Fund

Tecumseh Schools Foundation

- *Bedore Scholarship Fund
- *Boltz Scholarship Fund
- *Buttolph Scholarship Fund
- *Gerald D. Nelson Scholarship Fund



Paula Trentman, 517.424.6569

Paula Trentman, 517.424.6569

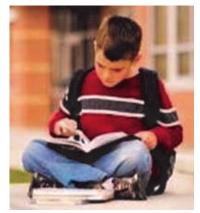
Paula Trentman, 517.424.6569

Sharon Smith, 517.436.3108

Paula Trentman, 517.424.6569 Dave Smith, 517.423.2848

Kerry Hamilton-Smith, 517.424.7318

"I just wanted to express my thanks once again for your support and also to give you an update on my first year of college. I recently finished my first semester at Adrian College, ending the term with a 4.0 GPA. I am studying hard and continuing to work two jobs part time. I am truly grateful." Taylor, Fred Kindinger Scholarship Recipient



Benefits of Giving

What are the Benefits of Giving?

Supporting the Lenawee County community and its future is the key reason most contributors choose to give to the Lenawee Community Foundation. Other advantages of being a donor include:

- •Local Impact Staff, board members, and local residents work together to assure that grants are targeted for the maximum benefit for our community.
- •Permanence Most gifts to the community foundation are endowed to last and make an impact forever.
- •Accountability Board members assure accountability to the community through sound financial and investment policies and management, including professional investment managers and an annual audit.
- •Economies of Scale Although each fund has its own identity, purpose, and data tracking, funds are pooled for investment purposes. This reduces risk, maximizes performance, and lowers overhead costs for each fund. There are many ways to contribute and accomplish one's charitable objectives, while minimizing paperwork that individuals might have to do on their own.
- •Tax Advantages Federal tax deductions and Michigan tax credits are available to donors.

How does the Michigan Tax Credit Work?

Once all the tax savings are taken into consideration, the net cost of a cash gift to the Lenawee Community Foundation or any of its more than 100 endowed funds is considerably less than the original contribution.

After the state tax credit and a federal tax deduction, a \$400 gift can cost a married couple less than \$65, including the stamp. Following are some examples of the tax benefits.

			Resident Estate or Trust
	Single	Married	or
	Taxpayer	Taxpayer	Corporation
Amount of Gift	\$200	\$400	\$10,000
State Tax Credit	\$100	\$200	\$ 5,000
Federal Tax Rate	33%	35%	34%
Federal Tax Savings	\$ 66	\$140	\$ 3,400
Total Tax Savings	\$166	\$340	\$ 8,400
Actual Cost of Gift	\$ 34	\$ 60	\$ 1,600

The Michigan tax credit is a 50% tax credit up to \$100 for single taxpayers, \$200 for married taxpayers, and \$5,000 for resident estates and trusts, or businesses filing Michigan business tax returns. The actual cost is calculated in the year of the gift. Federal tax savings vary depending on one's income level and tax bracket. To request a brochure about the Michigan Tax Credit, contact the Lenawee Community Foundation at 517.423.1729. This chart is for informational purposes, and we recommend that you consult with your personal tax advisor for assistance with tax credits.



What are Some Ways to Contribute?

The Lenawee Community Foundation recognizes that each individual, family, organization, or corporation with whom we work has unique charitable interests and financial circumstances. Your attorney, accountant, insurance agent, financial planner, or trust officer can assist you in determining the methods that will achieve your charitable goals, while receiving the maximum tax and legal advantages allowed for your gift. You may also contact the Lenawee Community Foundation at 517.423.1729 for further assistance.

LENAWEE COMMUNITY FOUNDATION



Grants and Scholarships

October 1, 2008 through September 30, 2009

Lenawee Fund

City of Hudson Extreme Community Makeover Grant -		\$455	
Thompson Memorial Park Playground Project			
Total Lenawee Fund		<u>\$455</u>	
Lenawee Leadership Fund			UFO
Bernice, Harry & Marda Gene Duncan Unrestricted Fund Extreme Community Makeover Grants Kiwanis Club of Addison - Smith Park Restoration Adrian Middle School 5-6 - Community Playground Blissfield Chamber of Commerce - Earth Day Nativescape Britton-Macon Parks & Recreation - Community Playground Deerfield Village & Township - Library Beautification	\$6,000		
Sand Creek PTO - Playground Project Lenawee Community Foundation	<u>11,400</u>		
		17,400	
Polph F. Holzarman, M.D. Uprastriated Fund		,	
Ralph F. Helzerman, M.D. Unrestricted Fund City of Hudson Extreme Community Makeover Grant - Thompson Memorial Park Playground Project	495		
Lenawee Community Foundation	70,350		
		70,845	
Lenawee Community Foundation Fund Council on Foundations	280		
Council of Michigan Foundations Lenawee County Human Services Council - Principles & Practices for Neurorafit Excellence Workshop	2,000 350		
Principles & Practices for Nonprofit Excellence Workshop Lenawee Dental Clinic Tecumseh Strings Orchestra	7,000 175		
Ŭ		9,805	
Total Lenawee Leadership Funds		<u>\$98,050</u>	
Field of Interest Funds		1	
Patrick Gill Empty Bowls Fund Food Bank of South Central Michigan - local food pantries		500	
Healthy Youth Healthy Seniors Fund Lenawee County Department on Aging - Project Ramp		2,230	
Ralph F. Helzerman, M.D. Endowment Fund Herrick Medical Center Renovation		6,851	
Herrick Endowment Fund Herrick Medical Center Renovation NewSong Community Church Extreme Community Makeover Grant - The Church Has Left the Building	13,149 <u>1,000</u>		
"Thank you for the funding to build ramps for older adults. En is very meaningful because it enables someone to continue to be in our society."		14,149	
Tom MacNaughton, Lenawee Department	on Aging		PAGE 10

Grants and Scholarships (continued)

Field of Interest Funds (continued) Kellogg Youth Fund 4H Great Lakes Shooters Wooble Trap Purchase \$1,000 Addison Wayne Gray Elementary "Hawk, I'm Your Brother" Diversity Program 1,000 Adrian Area Chamber of Commerce Mentoring & Educating Youth in Lenawee 500 Adrian High School **Operation Flower Power** 500 Adrian Middle School 5-6 Maple Community Playground 1,000 Adrian Public Library Careers and College Program 1.000 Alexander Playground Alexander Playground Equipment 1,000 **Blissfield Community Schools** After School Assets Program 1,000 **Blissfield Recreation** Youth Soccer Camp for Migrant Children 500 Communities in Schools of the Tecumseh Area Surviving Today - Thriving Tomorrow 1,000 Girl Scouts Heart of Michigan - Onsted Area 2010 Camp Explorations 1,000 Lenawee Community Foundation 12,095 Lenawee YOUTH Council and Lenawee Youth Leadership Lenawee Medical Care Facility & Prairie Elementary School Partnership of Love 250

\$21,845

"Your support provides added value as we work to strengthen, promote and increase philanthropy in Michigan."

> Melaníe B. Colaíanne, Councíl of Michigan Foundations





LENAWEE COMMUNITY FOUNDATION

Field of Interest Funds (continued)

eld of Interest Funds (continued)		
V.C. & Velma Knight Memorial Fund		
Associated Charities of Lenawee County Thanksgiving Basket Program	\$712	
Catholic Charities of Lenawee Counseling Program	3,000	
Family Counseling & Children's Services Catherine Cobb Domestic Violence Shelter	8,000	
Lenawee Housing Development Coalition Legacy Housing Program	500	ADE
Habitat for Humanity of Lenawee County LISD Tech Center Build	2,000	
Lenawee Department on Aging Project Ramp	2,000	AND AND A
St. Mary's Food Pantry	10,000	
Salvation Army Basic Needs for Newly Unemployed Persons	<u>3,890</u>	
		\$30,102
Onsted Area Fund Onsted Community Recreation Committee - Safety Equipment		500
Ruth V. and Ruth Anne Thompson Fund		
City of Tecumseh Community Center	1,223	
City of Tecumseh Tecumseh Center for the Arts	80,000	Case Martin
City of Tecumseh Trail Development	25,000	
Community Arts of Tecumseh Fine Arts Programming	10,000	1 Min Cal
Herrick Medical Center Constance A. Farver Women's Health Center	150,000	
Lenawee Imagination Library Books for Children	16,000	
Lenawee Imagination Library Endowment	5,000	
Tecumseh Service Club Basic Needs Services	<u>20,000</u>	
		307,223

Total Field of Interest Funds

\$383,400

"Thank you for supporting the Thanksgiving Basket program. It is because of your generosity that we are able to meet the basic needs of Lenawee County citizens of all ages." Eloise Hosken, Associated Charities of Lenawee County

Grants and Scholarships (continued)

Donor Advised Funds

Total Donor Advised Funds	<u>\$222,925</u>
The Brenda Ross Fund	2,892
Maxwell Family Fund	13,388
Downing Family Charitable Fund	6,400
Frank & Shirley S. Dick Donor Advised Fund	61,000
Brazeway, Inc. Fund	\$139,245

Grant recipients from Donor Advised Funds included: Adrian College, Adrian First United Methodist Church, American Legion Post #275, Bixby Community Health Foundation, Boys & Girls Club of Lenawee, Catholic Charities of Lenawee, Communities in Schools of the Tecumseh Area, Croswell Opera House, Constance A. Farver Women's Health Center at Herrick Medical Center, Hospice of Lenawee, Lenawee Christian Ministries, Lenawee Community Foundation, Lenawee United Way, Siena Heights University, and scholarships.

Designated Funds

Communities in Schools of the Tecumseh Area	\$10,000
Goodwill Industries of Southeastern Michigan	23,426
Greater Adrian Economic Development Fund - Lenawee Economic Development Corporation	50,000
David & Shelley Hickman Endowment Fund for the Lenawee Community Foundation	2,150
George W. Romney Fund for Volunteerism - Lenawee Community Foundation	8,000
Robert & Albert Ward Todd Endowment - Tecumseh Center for the Arts	25,000
Total Designated Funds	<u>\$118,576</u>

Community Project Funds

Adrian Area Chamber of Commerce Fund	\$10,170
Alexander Playground Fund	18,953
Athena Aid Fund	123
Athena Lenawee Fund - Leadership Program	7,494
Bear's Lair Playground Fund	5,000
Blissfield Center for the Arts Fund	2,901
Blissfield Skateboard Park Fund	13,060
Boys & Girls Club of Lenawee Student Assistance Fund	2,322
The Breast Cancer Awareness Fund—Herrick Medical Center Foundation	7,000
Britton-Macon Area School Capitol Projects Fund	10,000
Children's Museum of Lenawee Fund	325
Disabled American Veterans Fund	5,700
Emergency Assistance Fund for Displaced Workers of Tecumseh Products	36,733
Friends of Tecumseh Schools Orchestra Fund	7,678

Community Project Funds (continued)

Lenawee County Human Services Council Fund Madison Community Summer Softball Club Fund MIS Night of Champions Fund - Hospice of Lenawee & Big Buddies Little Buddies of Lenawee Mirelez Living Legacy Music Scholarship Fund Rotary Club of Adrian Morning Fund St. Mary's Church Capitol Projects Fund Tridoma - Free2Play - PEAK PE Institute Zonta Service Fund

"I signed up my children for the Imagination Library. What a wonderful thing you are doing. Thank you so much from all of us parents." Shelbi, Lenawee County Parent

Scholarshin Funds



755
848
2,890
1,544
290,106
50
15,800
\$442.797

\$3,345

	\$10,210
250	
500	
2,000	
250	
500	
500	
500	
<u>250</u>	
	4,750
100	
5,000	
771	
<u>3,000</u>	
	8,871
	500
	1,500
	4,084
	PAGE 14
	500 2,000 250 500 500 250 100 5,000 771

Grants and Scholarships (continued)

Scholarship Funds (continued)

Lenawee County Educational Foundation			
Adrian Women's Club - Thelma Swigert Memorial Scholarship Fund	\$500		
Eric Brandeberry Memorial College Scholarship Fund	1,500		
Ward Bush Scholarship Fund	2,250		
Jacqueline Long Carson Scholarship Fund	1,000		
Lucy Wolcott Barnum Chapter D.A.R. Scholarship Fund	2,500		
Fab 4 Scholarship Fund	2,250		
Fairfield Chapter #224 OES, Thelma Swigert Memorial Scholarship Fund	1,000		
Fleur de Lis Scholarship Fund	250		
Francoeur Scholarship Fund	1,500		
Richard Germond Scholarship Fund	1,000		
Lawn Family Scholarship Fund	1,000		
Lenawee County Association of Realtors Scholarship Fund	1,000		
Matthew D. Lips Memorial Scholarship Fund	500		
Bradford & Bronson Mansfield Scholarship Fund	750		
Rex & Mary Martin Scholarship Fund	1,500		
Pauline & Sebastian Pizaña Memorial Scholarship Fund	1,000		
Poppink Scholarship Fund	500		
Porter Scholarship Fund	1,500		
Lloyd W. Ruesink Memorial Scholarship Fund	1,000		
Stubnitz Scholarship Fund - Arts	4,000		
Stubnitz Scholarship Fund - Engineering	4,000		
John Wyatt Sr. Memorial Community Service Scholarship Fund	1,500		
Joan & Lysle Yeutter Scholarship Fund	<u>1,500</u>		
M & S Foundation Fund			
Sister Anthonita Porta At-Risk Scholarship Fund			
James J. Robideau Memorial Scholarship Fund			
Tecumseh Area Soccer Club Scholarship Fund			

"I would like to express my outward gratitude for your generosity in granting me the renewed scholarship for the 2008-2009 school year. The scholarship is deeply appreciated as I continue my scholarly pursuits at Michigan State University. Thanks again!" Doug, Bertha LaPointe Scholarship Recipient

LENAWEE COMMUNITY FOUNDATION

\$33,500 9,000

> 36,721 500

> > 2,000

Scholarship Funds (continued)

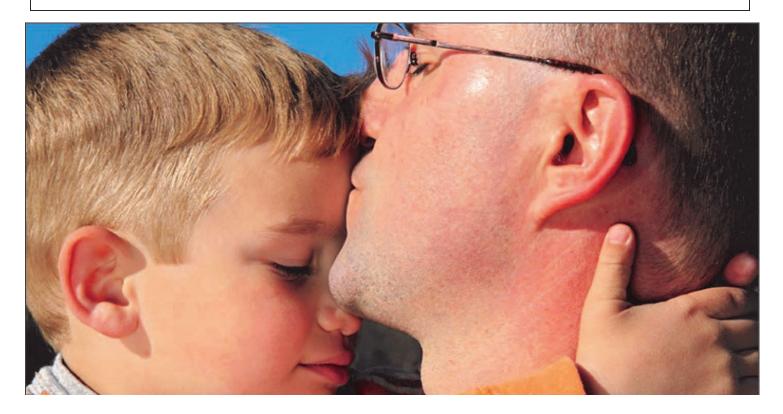
Tecumseh Schools Foundation		
Bedore Scholarship Fund	\$1,250	
Boltz Scholarship Fund	500	
Buttolph Scholarship Fund	4,000	
Gerald D. Nelson Scholarship Fund	<u>5,000</u>	
		\$10,750
Zonta International of Lenawee Scholarship Fund		3,240
Total Scholarship Funds		<u>\$125,626</u>

Total for all Funds

<u>\$1,391,829</u>

"Having the Lenawee Community Foundation as a partner in this unique opportunity provides us the chance to impact underage and young adult binge drinking on college campuses, adult alcohol misuse, and (mis)perception about standard drink size. As a national pilot, other communities will model their strategies from our successes and challenges."

Jessica Murray, Lenawee Substance Abuse Prevention Coalition, Community Action Agency



For a copy of the Grant Guidelines, contact Sue Hammersmith, President & CEO at 517.423.1729 or shammersmith@ubat.com or visit our web site at <u>www.lenaweecf.com</u>.

Lenawee YOUTH Council

Amazing! That is the word to describe the Lenawee YOUTH Council (LYC) members who led and participated in Youth Leadership summer day camps, conducted a grant process for the Kellogg Youth Fund, and volunteered to make our Lenawee community a better place.

During the past year the LYC:

- ☑ Assisted with the Associated Charities Thanksgiving and Christmas food basket programs.
- Gardened at HOPE Community Center's community garden.
- ☑ Created the Teen Resources Unlimited card, a listing of services available for young people in our area.
- ☑ Wrote letters from Santa to preschool children.
- ☑ Granted almost \$10,000 to 12 local youth-serving organizations.

During the grant process they: read and evaluated 5-10 pages of information for each request; asked tough questions; decided which needs were most important; advocated for their opinions; reached consensus on funding decisions; and presented their grant recommendations to the Lenawee Community Foundation Board of Directors for approval.



For a complete list of the Kellogg Youth Fund Grants see page 11.



LENAWEE YOUTH COUNCIL MEMBERS

One of the youth grants was for *Strive Today* - *Thrive Tomorrow*, an event

that assisted families facing struggles

due to the current economy.

BRITTANY AMES * AMELIA BALINSKI * MICHAEL BALINSKI * BESS BARNES * ALISON CARPENTER * EMILY CARSON * CHARLOTTE COBERLEY * KATELYN COBERLEY * CRISTINA COTE * ELI FRANCOEUR * CHRISTINA FROST * PAYTON GALVAN * LAUREN HARSH * GABE HEIDBREDER * GABRIEL LEE * MIKE MCDOWELL * LAUREN MILLER * JACOB MOCK * PAIGE MOCK * CARSON MUSOLF * KYLIE MUSOLF * MICHAEL MYERS * SYDNEY MYERS * LIZZY NELLIS * ASHLEY O'LEARY * KAMIANNA PIEKAREK * SAGE REBOTTARO * ALISSA REEDER * BREINNE REEDER * EVAN SCHNABELE * JEREMY SUAREZ * AMY WELKE * ANNA WENDT * JENNA WHITE * MADISON WILSON





Breinne Reeder & Eli Francoeur serve as Youth Representatives on the Lenawee Community Foundation Board of Directors.

"What a fabulous gift to Lenawee County children, parents, and teachers. As a school employee working extensively with kindergarten students, I look forward to experiencing the impact of the Imagination Library first hand as a professional and a mother."

Molly, Lenawee County Parent



VOLUNTEER Lenawee!

Volunteerism is a pathway to solving some of our community's most pressing issues. At a time marked by economic challenges, individuals and families across Lenawee County have jumped on board to strengthen our community through volunteer service and enrich their own lives.

In our first year, Cheryl Beauchamp, an AmeriCorps*VISTA volunteer, provided the "I think I can" spark for the Lenawee Community Foundation's volunteer center, VOLUNTEER Lenawee! Over 200 community members volunteered more than 2,000 hours of service. Also 50 new community partnerships were established.

VOLUNTEER Lenawee! continues to serve ALL nonprofits and ALL residents. We do not limit our services to a particular issue, group of people, or type of activity. We assist:

- Individuals seeking volunteer opportunities or community resources.
- IN Nonprofits that need volunteers or community resource referrals to assist their clients.
- ☑ Volunteer administrators who desire continued education in volunteer management.

If you want to get involved or need resources:



⊠ Visit us at www.1-800-Volunteer.org.

Call 1-800-Volunteer (865-8683), and enter your zip code or call directly at 517-424-6569.

E-mail us at ptrentman@ubat.com.

☑ Visit our office at 603 North Evans Street in Tecumseh. We recommend that you call ahead for an appointment.

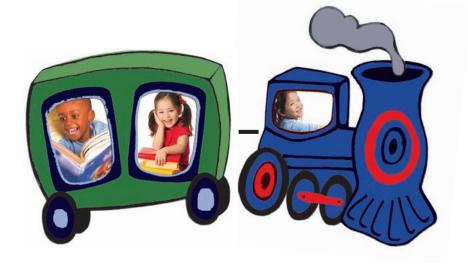
A portion of funding for VOLUNTEER Lenawee! comes from a Volunteer Investment Grant via the Volunteer Centers of Michigan/Michigan Nonprofit Association from the Michigan Community Service Commission.

Lenawee Imagination Library

What is Lenawee Imagination Library?

The Lenawee Imagination Library delivers a new, age-appropriate book every month to children ages 0 to 5, who live in Lenawee County. Although families are not charged to receive books, the cost is approximately \$30 per year, per child.

For information about the program or a registration form contact the Lenawee Community Foundation at 517-423-1729, shammersmith@ubat.com, or visit www.lenaweecf.com.







Cheryl Beauchamp, former AmeriCorps*VISTA & Anthony Sacco, current AmeriCorps*VISTA



Lenawee Leave a Legacy



V.C. & Velma Knight

Lenawee Leave a Legacy is a collaborative that promotes and encourages planned giving for the benefit of the Lenawee County community.

Lenawee Leave a Legacy Partners

Mitch Blonde Siena Heights University

Perry Foor Summit Financial Group

John Gruel Gross Puckey Gruel & Roof

Sue Hammersmith Lenawee Community Foundation

Dave Hickman Lenawee Community Foundation

> Bill Kenyon Hospice of Lenawee

Mike Olsaver Robison Curphey & O'Connell

> Ron Reeves Adrian College

Kathleen Schanz Lenawee United Way

Sheila D. Schwartz Bixby & Herrick Medical Centers ProMedica Health System "My parents came from humble backgrounds," stated Marilyn Underhill, daughter of V.C. and Velma Knight. "But, they did well financially and were able to help hundreds of people in their lifetimes."

But V.C. and Velma Knight have done much more than help people in their lifetimes. Although Velma passed away in 1980, and V.C. in 2005, they continue to help others. In fact, their most recent grant distributions of \$25,000 will assist thousands of Lenawee residents with their basic needs.

Their "dedication to help their fellow human beings," according to their daughter, is alive today because of the legacy they left. Currently, their legacy is providing counseling services, assisting the Catherine Cobb Domestic Violence Shelter, building wheelchair ramps, helping to renovate a Habitat home, and providing food to people in need.

V.C. was a pioneer in the air conditioning business and owner of Addison Products Company, while Velma was a lifelong Bible scholar. But, today they're known as caring people, who chose to leave a legacy that will live *for good for ever*.

> Please consider including the Lenawee Community Foundation in your will or estate plan. For good. For ever.



"On behalf of the St. Mary's Social Concern Committee, please pass on our most sincere thanks. The grant will allow us to better assist nearly 2,600 families in Lenawee County in dire need of food and other emergency assistance."

Constance Reid Guffey, St. Mary's Social Concern Committee

The Legacy Society

We are appreciative of the following persons who have left a bequest to the Lenawee Community Foundation.

Earl E. & Lenore C. Bedore *Tecumseh Schools, Bedore Scholarship Fund*

> Richard P. Boyd Lenawee Leadership Fund

Florence M. Bridleman Florence Bridleman Scholarship Fund

Bernice I. Duncan Bernice, Harry & Marda Gene Duncan Scholarship Fund Bernice, Harry & Marda Gene Duncan Unrestricted Fund

Sam Hamilton Britton-Macon Area School, Sam Hamilton Scholarship Fund

> Dr. Ralph & Harriet Helzerman Ralph F. Helzerman, M.D. Endowment Fund Ralph F. Helzerman, M.D. Unrestricted Fund

> > Bertha M. LaPointe Bertha LaPointe Scholarship Fund

Max Larsen Britton-Macon Area School, Max Larsen Scholarship Fund

> Marian Meier Marian & Otto Meier Scholarship Fund

> > Marian J. Rozelle *Lenawee Leadership Fund*

Ruth V. & Ruth Anne Thompson Ruth V. & Ruth Anne Thompson Fund

Willard D.VanTuyle Clinton Community Schools, Willard D. & Mary K. VanTuyle Scholarship Fund

Our deepest gratitude is extended to the members of The Legacy Society, who have made arrangements for planned gifts to the Lenawee Community Foundation.

Dr. Carlton & Lynn Cook Frank & Shirley Dick Merlyn & Myrna Downing Donald W. Garmon Bruce & Susan Goldsen Charles H. & Margaret Gross James & Suann Hammersmith David S. & Shelley Hickman David E. & Jeanette Maxwell Mark Prielipp & Kathryn Mohr Cindy Tomlin

If you have provided for the Lenawee Community Foundation or any of its funds in your will or trust, and are not included on this list, please consider informing the Foundation of your intent. Contact Sue Hammersmith at 517.423.1729.

Financial Position

As of fiscal year end September 30, 2009

ASSETS

Total Assets	\$ 1	2,817,000
Less: accumulated depreciation		(1,310)
Real Estate/Furniture & Fixtures		467,588
Investments - long term	1	1,678,968
Investments - short term		635,543
Cash	\$	36,211

LIABILITIES & NET ASSETS

Liabilities	
Accrued expenses	\$ 3,602
Charitable Gift Annuities Payable	81,064
Funds held in agency capacity	951,584
Total Liabilities	1,036,250
Net Assets	
Unrestricted	171,161
Temporarily Restricted	10,015,368
Permanently Restricted	1,594,221
Total net assets	11,780,750
Total Liabilities & Net Assets	\$ 12,817,000

REVENUES & OTHER SUPPORT

Contributions	\$ 781,668
Contributed materials & facility	20,310
Contributed services	24,420
Interest & dividends	407,213
Other fee/fundraiser income	8,895
Realized gains/(losses)	(1,967,148)
Unrealized gains/(losses)	1,687,260
Less: amounts allocated to agency activity	(261,060)
Total Revenues and Other Support	\$ 701,558

EXPENSES

Program Expenses		
Scholarships	\$ 165,254	
Grants and allocations	1,272,120	
Total Program Expenses		\$ 1,437,374
General & Administrative		79,543
Fundraising		46,307
Less: amounts allocated to agency activity		(499,043)
Total Expenses		1,064,181
Change in Net Assets		(362,623)
Net assets at beginning of year		12,143,373
Net assets at end of year		\$ 11,780,750



7%

Program Expenses 93%

The Lenawee Community Foundation is a not-for-profit corporation exempt from income tax under Section 501(c)(3) of the Internal Revenue Code. The Foundation is a certified community foundation under Michigan laws. Under these laws, contributions to endowed funds in the Foundation qualify for state tax credits on both personal income and business tax returns. The financial statements are prepared on an accrual basis of accounting. Under this method, revenues are recognized when earned and expenses are recognized when incurred.

A certified audit was conducted by Robertson Eaton & Owen, P.C. For a copy of the audit report, contact the Lenawee Community Foundation at 517.423.1729.

LENAWEE COMMUNITY FOUNDATION

List of Contributors

October 1, 2008 through September 30, 2009

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"I want to thank you for your kindness. It was a blessing." Becky, former employee from Tecumseh Products

LENAWEE COMMUNITY FOUNDATION

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Please be assured that every effort has been made to assure accuracy in the list of contributors and volunteers. If you are aware of an omission or correction, please contact Sue at the Lenawee Community Foundation at 517.423.1729 or shammersmith@ubat.com.

Acknowledgments

Our deepest appreciation is extended to the many volunteers who have given their time and talents to benefit the Lenawee Community Foundation.

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"Words cannot express how we feel about your generosity. It is sensitive, caring people like you living in our community that make it a better place to live. It is people like you that help keep us thinking positive and give us hope that things will get better."

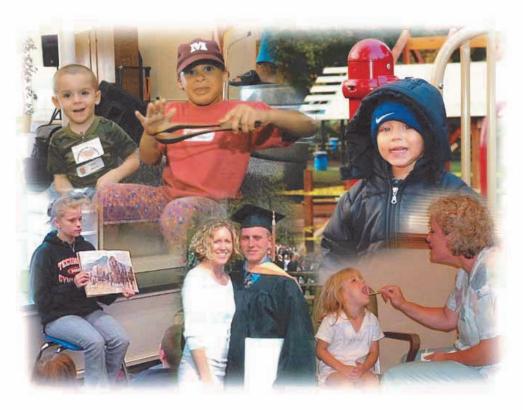
Ruben, Former Employee of Tecumseh Products

Special Thanks

United Bank & Trust generously donates equipment, services, and office space in its Wealth Management Group building to the Lenawee Community Foundation.

> Joe Williams, President & CEO, United Bank & Trust receives appreciation from Sue Hammersmith, President & CEO of the Lenawee Community Foundation.





You live here. Lenawee County is your home.

No one cares about Lenawee as much as you and other residents here.

You have an opportunity to help your neighbors today, and make Lenawee's future brighter.

Please consider including the Lenawee Community Foundation in your will or estate plan. For good. For ever.



United Bank & Trust Wealth Management Office 603 North Evans Street Post Office Box 142 Tecumseh, Michigan 49286

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