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Council of Michigan Foundations

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1994-95 ANNUAL REPORT

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## MISSION STATEMENT

*The Council of Michigan Foundations is an association of foundations and corporations which make grants for charitable purposes. As a membership organization, our mission is to enhance, to improve, and to increase philanthropy in Michigan.*

CMF's Mission Statement was revised during 1994 to reaffirm the donor membership nature of the Council of Michigan Foundations. Grantmakers are our principal constituency and primary source of support. The Statement also recognizes that CMF Members come primarily from those who make grants in the State of Michigan.

Our mission "to enhance" and "to improve" philanthropy declares that we will both advocate for and educate about practices and policies affecting philanthropy. Our mission "to increase" philanthropy means that we will undertake efforts to increase charitable resources in the state, primarily through the growth and creation of family foundations, community foundations, and corporate giving programs.

## ABOUT THE COUNCIL OF MICHIGAN FOUNDATIONS

CMF began in 1973 and was incorporated in 1975. We are affiliated with the Council on Foundations and 23 other regional associations of grantmakers throughout the country.

Serving Members is CMF's primary focus. However, other constituencies are provided assistance as they relate to CMF's Purposes. These include all other Michigan foundations and corporate grantmakers, state and national government representatives, the media, grantees, the national and regional grantmaking community, and the general public.

## OUR PURPOSES

In October 1993, CMF's Future Planning Committee distributed over 1,000 questionnaires to Members—including donors, trustees and staff—asking that they share their opinion about each CMF Purpose, and that they assess CMF's Member services and identify possible future programs and activities. The survey provided valuable insight into our Members' views concerning the future of CMF.

To echo the recurring response that CMF should be a proactive leadership organization, a new Purpose was approved by the CMF Board and added to the existing statement. CMF's sixth Purpose—LEAD—will be met by sponsoring educational programs on selected subjects; giving visibility to grantmaking activity; becoming a clearinghouse for activities by grantmakers across the country; seeking links with state organizations to provide increased information to the grantmaking community; and supporting and facilitating the collaboration of funders with information or by establishing supporting organizations such as the Michigan AIDS Fund (MAF) and the Michigan Community Foundation Youth Project (MCFYP).

### CMF's six purposes are:

**Network**—To provide the means for regular sharing of ideas, experiences, and expertise among grantmakers.

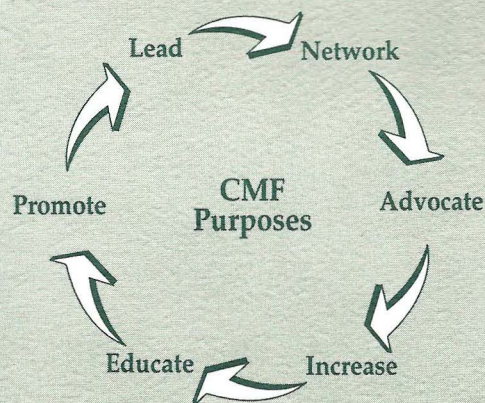
**Advocate**—To represent Michigan grantmakers' interests and concerns with local, state, and national governments.

**Increase**—To increase the grantmaking resources of foundations and corporations in Michigan.

**Educate**—To provide Michigan grantmakers with educational resources, information, and services in order to enhance and improve philanthropy.

**Promote**—To inform the public of the importance of contributions of Michigan grantmakers to the citizens of the state and society-at-large.

**Lead**—To exercise leadership through facilitating members' responses to needs in the state.





## MESSAGE TO CMF MEMBERS

Dear CMF Members:

If what transpired last year can serve as an indicator of what lies ahead, the Council of Michigan Foundations' future will be bright and exciting.

- There are more Michigan foundations.
  - 54 new foundations were created last year, bringing Michigan's total to 1,198.
- There are more corporate giving programs of all sizes.
  - More corporations are noting the value of corporate philanthropy to their shareholders and their bottom lines.
- There are more dollars for grants.
  - Grantmaking is up 15% or nearly \$100,000,000.
- There are more volunteers.
  - At CMF, the number has increased to more than 400 volunteers.
  - The number of youth participating with Community Foundation Advisory Committees has grown to 1,200.
  - Grant recipients report their grants are having greater impact in their communities.
- And within CMF
  - 80 trainings have been held;
  - 17 new publications were published;
  - on average, CMF received 30 requests a day for information;
  - the office has expanded its physical space; and
  - the staff has further diversified.

In 1973, when the first CMF Conference was held, the grantmaking community represented only great needs and high hopes. Twenty-one years later the evidence is clear that by working together we can achieve good things for the people of Michigan. Everything CMF has been able to accomplish relates to the commitment and involvement of our membership.

You may recall reading as a young child, *"Through the Looking Glass,"* by Lewis Carroll. In the story, the Good Queen tells Alice something that is ridiculous, and Alice replies, "But that's impossible." The Good Queen says, "Well, of course it's



*The Council of Michigan Foundations' Board of Trustees*

impossible. I always believe in impossible things. I make it a point to believe in one impossible thing before breakfast every day."

That is just what the CMF Members, Board, and staff have done — "believed in impossible things"— and good things have been accomplished. CMF is now in the beginning stages of a challenging Five-Year Strategic Plan, and the CMF trustees and staff are confident that the revitalized mission, goals, and values, will help CMF continue to meet the challenges of the future and to provide all Michigan grantmakers with the best possible service.

It is exciting to think of what lies ahead for Michigan philanthropy.

Herbert H. Dow  
Chairman

Dorothy A. Johnson  
President and Trustee



## NETWORK

To provide the means for regular sharing of ideas, experiences and other communication among grantmakers

- CMF's 22nd Annual Conference, *"The Magic of Community,"* offered the 791 grantmakers in attendance a total of 113 speakers and 33 sessions from which to choose.
- **40 new Members** were approved. Membership totaled 340 at fiscal year-end.
- The CMF Annual Regional Members' Meeting provided an opportunity for 75 Members from the Midland/Bay City/Saginaw area to meet the CMF Board of Trustees and discuss issues of concern.
- CMF staff assisted in coordinating ten meetings of the **Detroit Area Grantmakers** group, four meetings of the **Greater Grand Rapids Donors Forum**, and three meetings of the **Michigan Women in Philanthropy** interest group.
- A new service, **Members' Briefings**, was initiated to help Members effectively convene meetings on grantmaking topics.
- CMF cosponsored **five major educational opportunities**:
  - \* 12th Annual Michigan Corporate Grantmakers' Workshop
  - \* Youth Leadership Conference
  - \* Grantmakers/Grantseekers Conference
  - \* Michigan Conference on AIDS
  - \* Child Care Conference

(Details for each of these can be found under the CMF Purpose of "Increase")



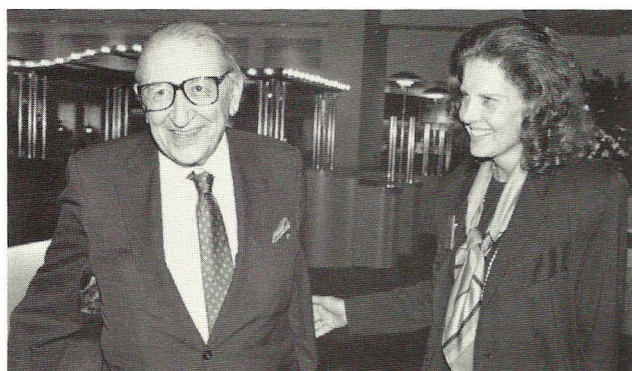
CMF Trustee Margaret T. Smith talks with Dave Thomas, Founder of Wendy's International. Thomas was a guest speaker at CMF's 22nd Annual Conference.

- 85% of CMF's 340 Members received a personal visit or phone call in response to a question or need. On average, CMF responds to **75 requests from members for information** each week.
- More than **4,000 news articles** from Michigan's newspapers were clipped and a copy forwarded to the featured CMF Member.

Throughout the year, CMF offers a variety of gatherings for Members and Michigan grantmakers to meet with each other and discuss topics of interest. On June 9, 1994, officers, trustees, and staff of CMF Member organizations from the Midland/Bay City/Saginaw area met with the CMF Board of Trustees at the home of Trustee Margaret A. (Ranny) Riecker and John, her husband, for CMF's Annual *"Regional Members' Meeting."* The evening event was attended by 75 individuals who enjoyed conversing with their fellow grantmakers, dinner, and an informal program honoring outgoing CMF chair, Leonard W. Smith.

The planning and execution of educational programming for CMF's 22nd Annual Conference, *"The Magic of Community,"* was led by Valora Washington of the W.K. Kellogg Foundation, who chaired a 25-member Program Planning Committee. When the three-day Conference opened on November 2, 1994, more than 790 grantmakers had registered for the event. Numerous opportunities to learn, upgrade and review grantmaking skills were offered, as well as ample time to network with colleagues and to peruse publications and videos displayed in the "Gathering Place" by fellow CMF Members. The cast of speakers who shared their knowledge with participants numbered 113, came from across the nation, and included the well-known personalities of Sara Melendez, John A. Edie, Johnnetta B. Cole, H. Peter Karoff, Neal Shine, Dennis Archer, and R. David Thomas. In total, 33 sessions were held, as well as several host events highlighting local talent and sites in the Conference host city of Dearborn. Serving as cochairs of the 34-member Host Committee were Leo J. Brennan, Jr. of the Ford Motor Company Fund, and Barbara C. Van Dusen of the Community Foundation for Southeastern Michigan. Max M. Fisher, chairman of the Max M. and Marjorie S. Fisher Foundation, was named honorary conference chair.





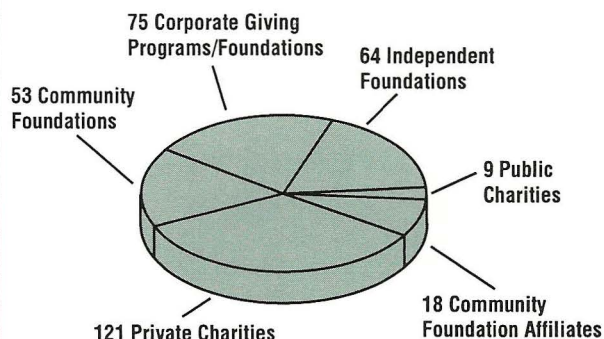
*Dorothy Johnson greets Max Fisher, honorary chair of CMF's 22nd Annual Conference.*

1994 will be remembered as the year a record number of new Members joined CMF. After approving 40 applications, CMF closed the fiscal year with 340 Members.

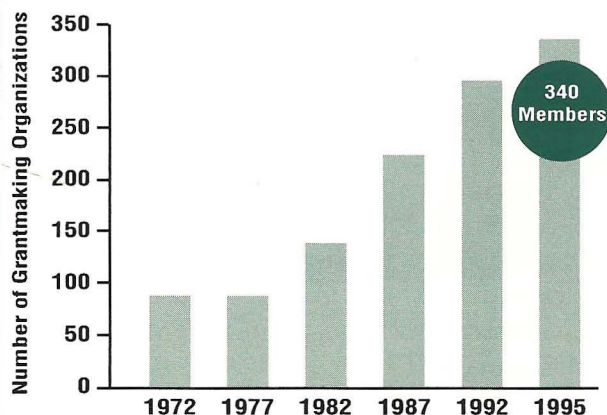
Requests for information continued on an upward trend. On average, 75 requests for information per week were processed through the CMF office. To ensure Members receive full and prompt response to inquiries, CMF staff continues to computerize all in-house resource materials, including books, periodicals and video cassette collections. More information on Information Services is shared under the CMF Purpose of "Increase."

A new service for Members, *Members' Briefings*, was established where CMF staff provides publicity and logistical support for any CMF Member wishing to coordinate a meeting on a grantmaking topic.

### Current Membership Composition



### Growth of CMF Membership



### Our 40 New Members

The Wilkinson Foundation  
 The Morey Foundation  
 Price-Waterhouse  
 The Michigan Native American Foundation  
 Huron County Community Foundation  
 Chris-Tina Foundation  
 Robert and Jeanine Dagenais Foundation  
 The Mary Carmel & Thomas P. Borders Tapestry Foundation  
 Osceola Community Foundation  
 Coopersville Area Foundation  
 Otsego County Community Foundation  
 Douglas L. & Maria P. DeVos Foundation

Max M. & Marjorie S. Fisher Foundation  
 W.B. McCardell Family Foundation  
 Hilda E. Bretzlaff Foundation  
 Library of Michigan Foundation  
 Hudsonville Community Foundation  
 Ionia County Community Foundation  
 Wyoming Community Foundation  
 Anna R. Pipp Foundation  
 The Young Foundation  
 Dickinson County Area Community Foundation  
 Rotary District 6360 Foundation  
 HealthPlus of Michigan  
 Negaunee Community Fund  
 Ishpeming Community Fund  
 Schoolcraft County Community Foundation

Porter Foundation  
 Ontonagon County Community Foundation  
 Athens Community Foundation  
 Homer Area Community Foundation  
 Community Foundation for Livingston County  
 Clio Fund  
 Fenton Fund  
 Grand Blanc Fund  
 Bedford Community Foundation  
 Big Rapids Area Community Foundation  
 Lake County Community Foundation  
 Oceana County Community Foundation  
 Baraga County Community Foundation



## ADVOCATE

To represent Michigan grantmakers' interests and concerns with local, state and national governments

- CMF successfully removed the \$3 million cap on the Michigan Community Foundation Tax Credit by obtaining Governor Engler's approval.
- CMF sponsored a Capitol Hill **Washington Visit** in February, 1995, in which eleven CMF staff and Members traveled to Washington, D.C. to inform the Michigan Congressional Delegation of philanthropic programs and grantmaker concerns.
- CMF gained support from ten Michigan congressmen for **HR733**—a bill involving the donation of publicly-traded stock to private foundations, and **HR734**—which allows private and community foundations to establish a tax-exempt common investment fund.
- The biennial **Legislative Seminar** for Michigan legislators and their aides was held.
- **Liaison with state groups** continues. CMF staff serve on committees and boards of organizations such as the Michigan Community Service Commission, Michigan Nonprofit Forum, and Michigan CARES.
- CMF continues its legislative effort as directed by the current *Legislative Goal Statement*.

Governor Engler signed an amended Michigan Community Foundation Tax Credit into law July 5, 1994, removing the \$3 million cap required in previous legislation. The tax credit amendments were the result of CMF's Tax Committee and Government Relations Committee, and community, private and corporate foundations and giving programs across the state working together to increase philanthropic giving. CMF was instrumental in creating the original tax credit in 1988 to encourage gifts to community foundations.



*The Council's legislative seminar was held in Lansing in March. It brought together state legislators, their aides, and CMF Trustees, staff and Members in an information exchange.*

On February 1, 1995, a delegation of eleven CMF representatives went to Washington, DC to meet with Michigan legislators and share information on Michigan's philanthropic activity. The event, dubbed the "*Washington Visit*," occurs yearly, at which time Congressmen are 1) updated on the benefits of Michigan foundations and corporate giving programs, 2) given a printout indicating all foundations in their district, as well as a complimentary copy of *The Michigan Foundation Directory*, and 3) their support is requested for legislation important to grantmakers. This year, cosponsorship of two important tax bills was sought: HR 733 and HR 734.





*The annual "Washington Visit" allowed for representatives of Michigan's philanthropic community to discuss issues with the State's congressional office holders.*

The response to our request was impressive: ten Michigan Congressmen agreed to cosponsor HR 733; and eleven congressmen are cosponsoring HR 734.

A complimentary grantsmanship seminar for legislators and their aides, "Foundation and Corporation Grants: Helping Your Constituents Find Resources," was held March 28, 1995 at the Lansing Center. Approximately 70 individuals were in attendance at this biennial seminar that is funded

by CMF's W.W. Allen Fund. This year, six CMF Members presented information and answered questions posed by the legislators and their aides. One participant from each legislative office received a complimentary copy of *The Michigan Foundation Directory*, 9th edition.



## INCREASE

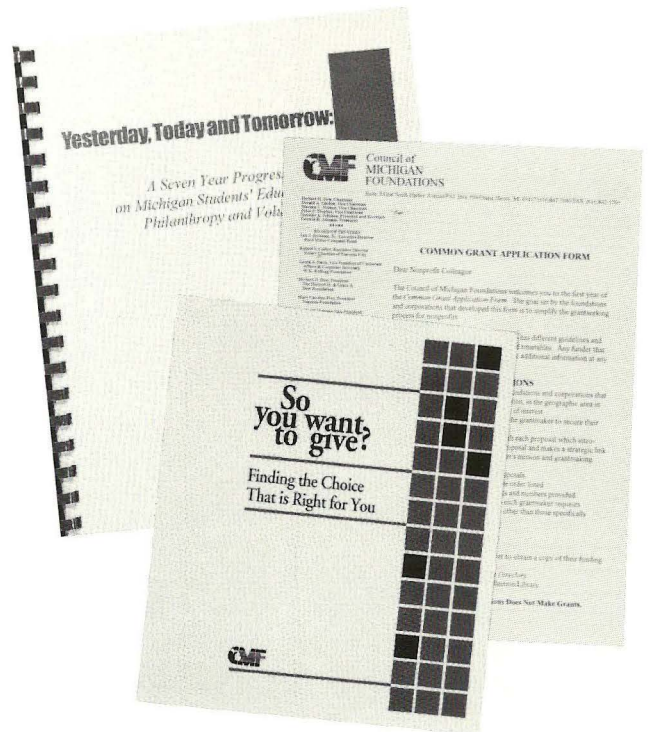
To increase the grantmaking resources of foundations and corporations in Michigan

- CMF published *So You Want to Give?* and distributed it complimentary to donors and their advisors.
- A new fund was created: the **Russell G. Mawby Fund to Improve and Increase Philanthropy**.
- *Yesterday, Today and Tomorrow* was published to report on the CMF Improving Philanthropy Committee's findings regarding Michigan's educational institutions and the presence of philanthropic/volunteerism courses.
- A **CMF Detroit office** was established to serve CMF's many southeastern Michigan Members.
- An **Internship Program** was established, offering college students an opportunity to learn more about Michigan philanthropy, while at the same time providing assistance to Michigan grantmakers in carrying out the grantmaking process.
- More than 40 Michigan foundations and corporate grantmakers are using the CMF-developed **Common Grant Application Form**.

A new product of CMF's Increasing Philanthropy Program, *So You Want to Give?*, was distributed complimentary to all CMF Members, as well as to several attorneys, accountants, and trust officers throughout the State of Michigan. The booklet will be a useful tool for these individuals when explaining the major options for giving that are available to Michigan donors. In total, 1,000 copies of the 11-page booklet were distributed.

When the Improving Philanthropy Committee of CMF was formed in 1987, no Michigan college or university had a comprehensive program related to the interests of the nonprofit sector. Today, 27 Michigan institutions of higher education are offering classes or curricula in philanthropy and volunteerism. To summarize and share the progress made over the past seven years, CMF released a new publication: *Yesterday, Today and Tomorrow*. All CMF Members received a complimentary copy.

The idea of a common application form to simplify the grantmaking review process has caught on



in Michigan, thanks to the work of several CMF Members who volunteered their time to make suggestions and audit several drafts of the form. CMF staff provided assistance in designing and implementing the user-friendly *Common Grant Application Form*, which meets the needs of a variety of grantmakers. To date, 43 Michigan grantmaking organizations are accepting the *Form* from grantseekers.

Fifty university representatives were contacted by letter and flyer to notify them of CMF's new Internship Program. To date, students are involved in the work of seven CMF Members participating in the program: Community Foundation for Southeastern Michigan, Detroit Edison, Frey Foundation, W.K. Kellogg Foundation, The Kresge Foundation, McGregor Fund, and the Muskegon County Community Foundation. An important element of the CMF program that differentiates it from other internships is a series of CMF seminars designed for the students. The seminars foster a broad picture of the field of philanthropy and afford the students an opportunity to network with peers.

In order to provide CMF Members in Wayne, Oakland and Macomb counties with greater accessibility to services, CMF acquired office space in Detroit and staffed the office with a volunteer Consultant-in-Residence. The consultant works to promote philanthropic networks, provides one-on-one assistance to Members, and helps to coordinate CMF's Detroit area educational programming.



## Russell G. Mawby Fund to Improve and Increase Philanthropy

During 1994, Dr. Russell G. Mawby, chairman and CEO of the W.K. Kellogg Foundation, announced his plans for retirement in 1995. Dr. Mawby is the founder of the Council of Michigan Foundations, served as its first Chair in 1972, and continues his involvement in CMF today as Advisory Cabinet chair and chair of CMF's Improving Philanthropy and Increasing Philanthropy committees. In honor of Dr. Mawby's outstanding commitment to philanthropy, the CMF Board of Trustees has established the Russell G. Mawby Fund to Improve and Increase Philanthropy. The Fund will be used to continue and expand CMF's efforts to enhance philanthropy and to increase charitable resources in Michigan. To date, the Fund is supported by 58 CMF Members.



*Ruth Mawby, Herb Dow (CMF Board Chairman), and Russ Mawby acknowledge the philanthropic Fund established in Mawby's name upon his retirement as CEO of the W.K. Kellogg Foundation. The apple symbolizes planting the seeds of giving and volunteering throughout Michigan communities.*

## PRIVATE: FAMILY & INDEPENDENT FOUNDATION PROGRAMS

- The CMF 22nd Annual Conference offered three specialized family foundation programs and a **Family Foundation Roundtable Breakfast**.
- Approximately **55 consultations** were accommodated for family foundation grantmakers during the year—including requests for information, specialized management requests, and assistance in starting new foundations.
- *Preparing the Next Generations* and *Family Foundation Management Audit* were produced and distributed complimentary to family foundation grantmakers in Michigan.
- **Eleven family foundations became CMF Members** during the year. In total, 40 new Members of all membership categories were accepted.
- *Family FAX*, a new CMF newsletter developed specifically to address the needs of family foundation grantmakers, premiered during Spring 1994 and dealt with topics of finance and investments.
- Two "Roundtable" meetings were held during the 22nd Annual Conference: **Program Officers' Roundtable** on evaluation was attended by 100 individuals; and the **Scholarship Roundtable** was attended by 50 individuals.
- An audience of 40 CEOs and program officers attended "Leadership and the Professions."
- The "Improving the Grant Proposal Process" **workshop** offered 100 grantseekers the opportunity to meet one-on-one and review grant proposals with 15 grantmakers.

Although family foundations and independent foundations are often considered to be very similar and are many times spoken about in the context of



"private foundations," their needs vary. CMF programming has been structured to meet these different needs.

Most frequently, family foundations are small, unstaffed organizations which strongly reflect the personal values and group dynamics of the donor's family and heirs. Identifying and articulating interests that are assumed to be intuitively known, finding time to administer an effective grantmaking program within a fully-engaged business schedule, supporting leadership in younger family members, and dealing with personal relationships in a business setting, are some of the issues which surface for these groups that are absent in other foundation settings. Services provided by CMF's Family Foundation Program that are welcomed in addressing these unique circumstances include personalized technical assistance, publications and meetings which concentrate on topics of peer interests.

Family foundation Members received a complimentary copy of two new CMF publications: *Preparing the Next Generations*—a workbook of practical ideas and activities to foster intergenerational involvement in family foundations; and *Family Foundation Management Audit*—a study of midsize family foundation management practices.

The needs of Michigan's independent foundations are being met through a new, formalized program which is overseen by the CMF Independent Foundation Committee. Committee members are currently in the process of identifying and developing educational and networking opportunities for



"Roundtable" meetings for family foundation grantmakers were held during the Annual Conference to discuss topics of mutual interest.



CMF's 64 independent foundation Members. A unique event offered during the program's first year was a CMF seminar, "Leadership and the Professions," that intellectually challenged participants by using literature to discuss leadership issues.

CMF independent foundation Members range from the largest foundation in the U.S. (the Ford Foundation with assets of nearly \$7 billion) to foundations with assets of approximately \$90,000. Of all membership classifications, independent foundations employ the most staff: 466 individuals consisting of CEOs, program and financial officers. CMF provides technical assistance on an as-needed basis and has increased its effort to share information about independent foundations by regularly highlighting their programs and services in *The Michigan Scene* and the *Memo to Members*.

Several Michigan independent foundations are founding organizations of CMF, including the W.K. Kellogg, Kresge, Hudson-Webber, and Charles Stewart Mott Foundations, as well as the McGregor Fund.



## CORPORATE: FOUNDATION & CORPORATE GIVING PROGRAM

- Sixty corporate grantmakers attended the **12th Annual Michigan Corporate Grantmaker Workshop**, "The Information Superhighway: What Grantmakers Need to Know," cosponsored by CMF.
- 16 corporations received **individualized planning and technical consultations**.
- More than 75 corporate grantmakers attended **three technical and topical corporate sessions** during the CMF 22nd Annual Conference.
- CMF staff assisted the **Michigan State Chamber of Commerce** with the development of articles for the May edition of *Michigan Forward*.
- More than **30 requests each week** for information on establishing a corporate foundation or corporate giving program, organizing a matching gift program, or seeking technical assistance on a corporate-related grantmaking topic were answered each week.
- During the year, **more than 1,300 articles** have appeared in newspapers across the state highlighting the activities of CMF's corporate Members.

The Corporate Giving Program, which CMF began in November 1989, was established to encourage the formation of new corporate foundations and corporate giving programs, and to enhance the efficiency and effectiveness of existing giving programs in Michigan.

In meeting this objective, CMF staff coordinate several meetings and training sessions to assist corporate representatives with development and implementation of giving programs. The Corporate Grantmakers Workshop was held December 2, 1994 at Ford Motor Company World Headquarters with 60 individuals in attendance. Sessions at the 22nd Annual Conference that were designed for corporate grantmakers included: "America's Search for Heroes," "United Way in the Competitive Environment," and "How Can Giving Away Money Be Unethical?"

The *Corporate Giving Newsletter* provides an excellent opportunity for Michigan corporate representatives to share information among community leaders about their corporate giving programs, as well as to obtain information about new grantmaking strategies.

Articles placed in Michigan's key business publications serve to raise the level of awareness of corporate leaders about the need for and benefits of corporate philanthropy. Therefore, CMF staff remain instrumental in obtaining articles from Members to enhance the issue of *Michigan Forward* magazine which is dedicated to corporate philanthropy. This marks CMF's fifth year in coauthoring the edition.



*Participants exchanged ideas at the 12th Annual Michigan Corporate Grantmakers' Conference, "The Information Superhighway and What Grantmakers Need to Know." The conference was hosted at Ford Motor Company World Headquarters in Dearborn.*

## COMMUNITY

*Beyond the services provided by the CMF Community Foundation Program, three special projects address specific community foundation needs: the Technical Assistance Project, Upper Peninsula Project, and the Michigan Communities' Foundation Youth Project (which is reported under the CMF Purpose of "Lead.")*

- National Community Foundation Conference
- Development Training for Community Foundations
- Three-State Community Foundation Conference
- CMF Executive Director Retreat
- Training Workshop for Community Foundation Support staff
- New Staff Orientation for Community Foundations
- More than 220 participants at the 22nd Annual Conference were community foundation grantmakers.



## Technical Assistance Project

CMF is dedicated to supporting the infrastructure of community foundations across the State:

- \* by extending the geographic reach of community foundations;
- \* by providing activities which build the organizational viability and leadership potential of Member community foundations;
- \* by assisting community foundations in raising assets; and
- \* by implementing the youth component of the MCFYP challenge grant.

During 1994, tremendous progress was made toward building community foundations throughout the State of Michigan, and it is possible that CMF will soon meet its goal of ensuring that every Michigan citizen has access to a community foundation. To date, 63 of Michigan's 83 counties are now served by community foundations.

- 109 on-site consultations were completed, and 62 legal questions have been answered for 26 community foundations.
- CMF has retained the services of a researcher from Grand Valley State University's Center on Philanthropy. The researcher will analyze data and then develop a monograph that examines when community foundations can financially support their operating costs based on fee income and projects. This work will also test the \$5 million "take-off" theory.
- The dollar cap on the Michigan Tax Credit was successfully removed.
- *The Michigan Community Foundations' Communication Manual* was published to aid community foundations with their marketing plan.
- A Clark, Klein and Beaumont attorney was retained to provide planned giving consultation to community foundations. The CMF software license for Crescendo, a program used to facilitate comprehensive asset development and planned giving, was transferred to this law firm for their work in servicing CMF community foundation Members.



*Among the numerous programs for community foundation personnel, the retreat for executive directors is highly rated.*

- A new publication was developed in collaboration with The Philanthropic Initiative: *Community Foundations and the Coming Intergenerational Transfer of Wealth: An Overview of Approaches and Strategies*. This is the first of three papers that are intended to serve as primers on the measures community foundations might consider taking to strengthen their outreach to prospective donors and the advisors. The publication was produced through a grant from the W.K. Kellogg Foundation.
- Opportunities for community foundation representatives to attend CMF educational events are occasionally subsidized. Mini-grants totaling \$95,295 were distributed to community foundations; scholarships averaging \$356 were awarded for staff to attend educational events. Data compiled this year revealed that support was provided for 933 participants at 21 trainings:
  - 221 trustees and staff attended the CMF 22nd Annual Conference
  - 175 youth were present at the Annual Youth Leadership Conference
  - 45 attendees for Regional Trainings
  - 180 attendees for Upper Peninsula Trainings
  - 35 executive directors and trustees attended the Executive-in-Residence Trainings
  - 300 youth for four Regional Youth Meetings
  - 15 new directors for the New Director's Academy
  - 15 program officers at the Program Officer's Retreat
  - 30 executive directors at the Executive Director's Retreat

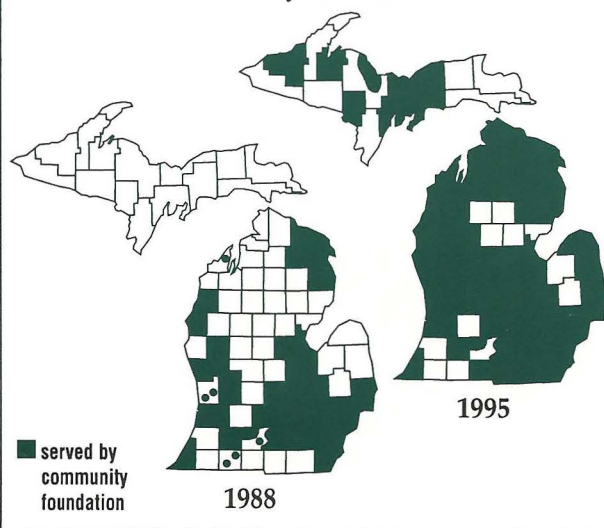


## In Support of Community Foundations...

CMF's successful effort to support community foundation infrastructure is revealed by the following statistics:

- \* Total Michigan community foundation assets have risen from \$200 million in 1987 to \$564 million in 1994, an increase of 184%.
- \* Grantmaking performed by community foundations has increased from \$13 million in 1987 to \$32 million in 1994.
- \* Staff has grown from 119 to 125 professional staff, with two community foundations adding their first staff members this year.
- \* As of March 31, 1995, Michigan supports 51 community foundations; and 19 geographic component funds, up from 12 in 1993.

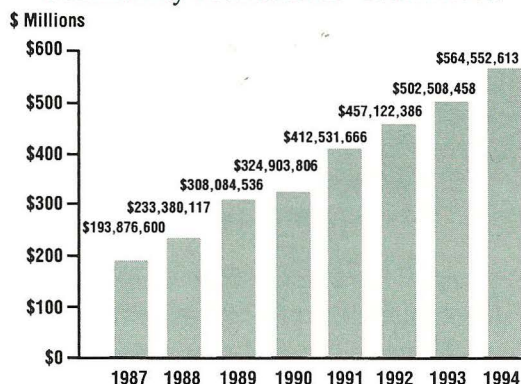
## Growth in number of counties served by community foundations



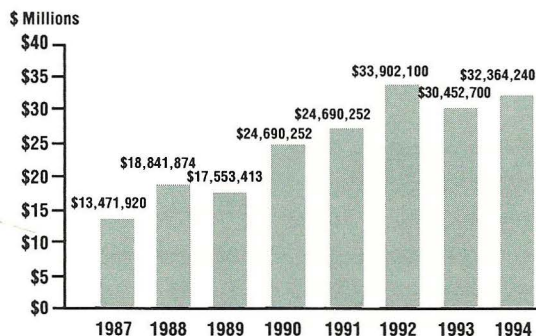
## Upper Peninsula Project

Last year, a part-time consultant was hired to assess the interest of Upper Peninsula communities in establishing community foundations. The findings were that CMF assistance is desired. Additional funding has been secured to continue the Project and provide the necessary services.

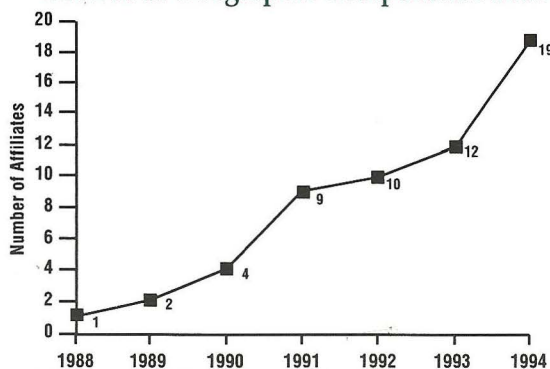
## Community Foundations' Total Assets



## Community Foundations' Total Grants



## Growth of Geographic Component Funds



- Five Upper Peninsula counties are now served by community foundations, with the possibility of seven more by the end of 1995.
- Eleven Upper Peninsula representatives attended the CMF 22nd Annual Conference.
- A second W.K. Kellogg Foundation grant was received to continue the organizing efforts.



## EDUCATE

**To provide Michigan grantmakers with educational resources, information and services in order to enhance and to improve philanthropy**

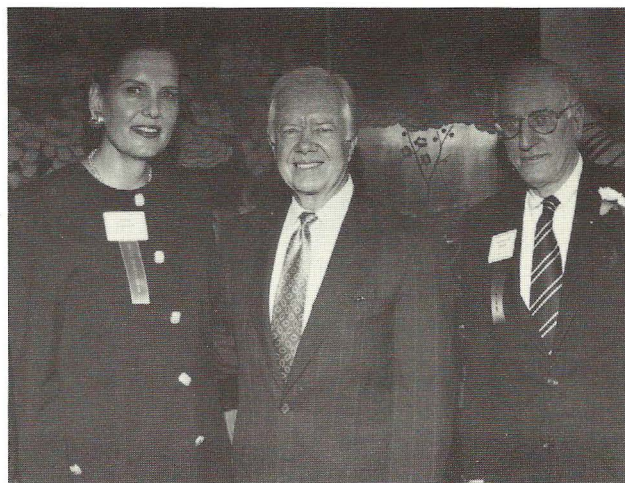
*This Purpose is met through the provision of general CMF services, as well as services provided by two special projects: the Improving Philanthropy Project and the Information Services Project.*

The **Improving Philanthropy Project** is an initiative to strengthen philanthropy in Michigan through improving, wherever possible, the efficiency and effectiveness of the nonprofit sector. Included among the Project's achievements is an annual meeting of grantseekers with grantmakers (Grantmakers/Grantseekers Seminars), and the establishment of two service organizations: the Michigan Campus Compact and Michigan Nonprofit Forum.

The **Information Services Project** was implemented through a CMF Community Foundation Program grant. However, the Project is now funded through CMF's general operating budget. CMF continues to expand its unique Library collection, adding over 700 items during the fiscal year. Based on the phenomenal growth in the number of requests received, CMF Information Services has become a valuable resource to Michigan grantmakers.

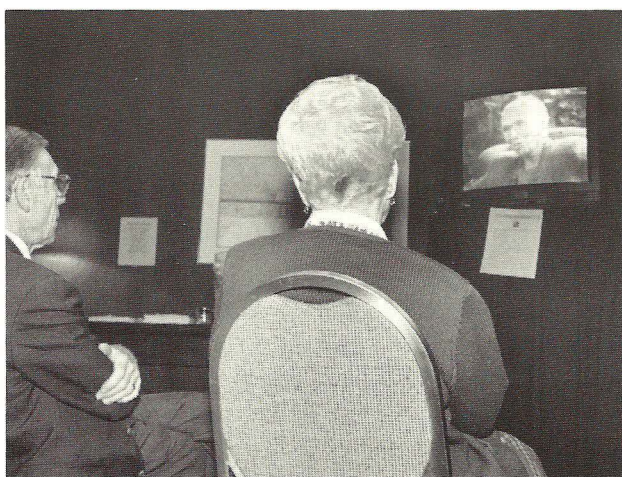
- CMF staff managed the **Gathering Place** and the **Video Film Festival** during the 22nd Annual Conference.
- A total of **1,531 requests** were answered by CMF Information Services staff by circulating library materials, bibliographies and handouts, and answering reference questions.
- CMF produced a new version of its **Publications Brochure** to provide a concise listing of all available CMF publications and resource materials.
- A new feature of the *Memo to Members, Information Alert*, shared details on new publications available on loan from the CMF Library to Members.
- CMF cosponsored the **Child Care Conference**, "Strengthening the Circle of Caring Communities for Children," held October 1994 at the Amway Grand Plaza, Grand Rapids.
- The sixth annual report of **Capital Campaigns** was distributed throughout the state as an insert to the Spring issue of *The Michigan Scene*.
- CMF cosponsored the **Sixth Annual Grantmakers/Grantseekers Seminar**, "A Vital Alliance for Michigan."

Thursday, May 12, 1994 marked the sixth consecutive year that grantmakers and grantseekers gathered together to examine challenges facing the nonprofit sector. Grantmakers/Grantseekers Seminar VI, "A Vital Alliance for Michigan," focused on exploring and defining the dynamics of the grantor/grantee relationship. The keynote speaker for the conference was the nation's 38th president, Jimmy Carter. The Grantmakers/Grantseekers seminars are sponsored by CMF and the Michigan Nonprofit Forum.



*Jimmy Carter, the nation's 38th president (shown here with Dorothy Johnson and Leonard Smith), was the 1994 keynote speaker for the Grantmakers/Grantseekers Seminar.*





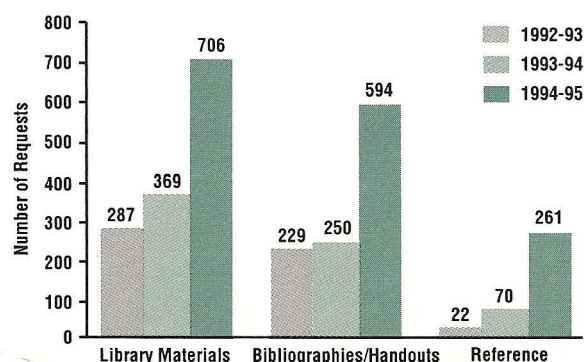
*"The Gathering Place," a tradition at each annual conference, is a location to meet friends, view video productions of interest, and browse the various publications available.*

More than 1,560 informational requests were received by Information Services this year. CMF staff answered these by circulating library materials, bibliographies and handouts, and answering reference questions. Reference services saw the greatest growth during the year with an increase of 1,065% documented over the previous year. A flyer, *Information Alert*, was published bimonthly to highlight new resource items of interest to grantmakers. Although automation of library holdings was completed in 1994, library staff are now pursuing digitalization of sample forms and documents. A review of the necessary hardware and software to perform this service is underway. Staff are also evaluating the possibility of allowing Michigan nonprofit organizations to access the CMF computer database from remote locations.

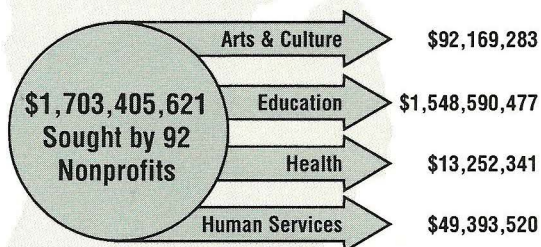
As a continuing service to CMF Members, the sixth annual survey of Michigan capital campaigns was conducted by CMF with the cooperation of grantseekers and grantmakers across the state. The final product, the *Sixth Annual Nonprofit Funding Campaigns Report*, assisted grantmakers in obtaining a sense of the fund-raising activity within Michigan. Even though the number of annual campaigns has remained relatively constant during the past six

years, survey results show that goals and total contributed dollars have increased dramatically. More than 150 of the state's nonprofit organizations responded to the 1994 survey, reporting 92 capital and/or endowment campaigns seeking more than \$1.7 billion in contributions. The *Report* was distributed to more than 5,000 individuals and nonprofit organizations via *The Michigan Scene*.

#### Growth of CMF Information Services



#### Results of the 1994 Nonprofit Funding Campaign Survey



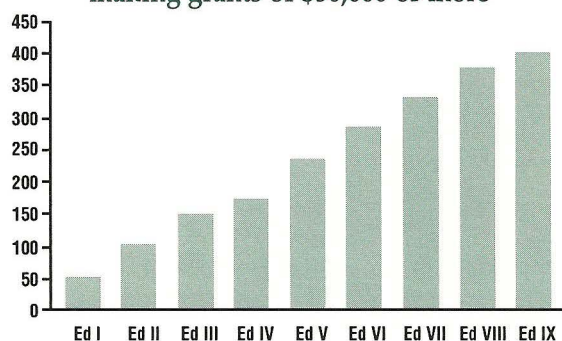


## PROMOTE

**To inform the public of the importance of contributions of Michigan grantmakers to the citizens of the state and society at large**

- Four issues of *The Michigan Scene* were produced and distributed to over 5,000 grantmakers, non-profit organizations, legislators, and media outlets in the state and nation.
- All CMF Members received seven issues of the *Memo to Members* and various complimentary publications.
- Four newsletters, each designed for a specific category of membership, were released:
  - Family FAX*
  - Community Foundation Memo to Members*
  - Yackety YAC*
  - Corporate Giving Newsletter*
- *The Michigan Foundation Directory*, 9th edition, was published.
- Two biennial publications were combined into one new booklet to inform grantseekers of the correct procedure in seeking grants. The booklet, *Information for Seeking Foundation and Corporate Grants/Survey of Michigan Foundation Philanthropy*, was released during January 1995.
- The biennial brochure, *Finding Work With Grantmakers*, was updated and distributed.

**Growth in Number of Michigan Foundations making grants of \$50,000 or more**



As reported by the *Michigan Foundation Directory* (by edition)

CMF's quarterly tabloid, *The Michigan Scene*, provides a vital avenue for grantmakers to exchange viewpoints, announce recent grants, share staff and programmatic changes, learn of upcoming events and new publications, and gain insight into the ever-changing needs of Michigan's citizens. CMF helps to increase public understanding of the value and needs of the philanthropic community, as well as calls attention to the good deeds of Michigan grantmakers, assists foundations in broadening their base of support, and informs grantmakers of successful work in the hope that efforts will be replicated. More than 5,000 individuals receive complimentary CMF publications on a regular basis.

The ninth edition of *The Michigan Foundation Directory* was published in November 1995. This edition marked the first time that CMF staff performed all functions of *Directory* production, as well as spearheaded the tasks of marketing and sales—which in previous years had been shared with the Michigan League for Human Services. The 1995 *Directory* reports that Michigan foundations currently number 1,198 (up from 1,144 noted in the 8th edition), with 404 providing grants of \$50,000 or more annually. The state's 332 largest foundations hold over 98% of total foundation assets.

### CMF's Major Publication.....

Production, marketing, and sales of *The Michigan Foundation Directory* are conducted by CMF. The current *Directory* reports:

- There are 24 company-sponsored foundations in Michigan with assets of more than \$1 million. Many companies do not have foundations, but maintain giving programs through their corporations.
- Twenty-nine community foundations in Michigan have assets in excess of \$1 million. In addition to these, 19 other community foundations serve the state's upper and lower peninsulas.
- The number of foundations granting \$50,000 or more annually has increased nearly eight-fold since 1975.



## LEAD

### To serve as a catalyst for philanthropic responses to critical needs in the state

*"Lead," the new Purpose of the Council of Michigan Foundations, was added to CMF's existing statement during 1994 to reflect our Members' belief that CMF should be a proactive leadership organization. CMF's two supporting organizations—the Michigan AIDS Fund and the Michigan Community Foundations' Youth Project—currently assist in meeting this objective.*

### Michigan AIDS Fund (MAF)

The Michigan AIDS Fund (MAF) was established in 1990 as a CMF fund. In 1993, MAF was incorporated as a supporting organization to CMF and is now governed by a Board of Trustees separate from that of CMF. We are proud that MAF has gained national recognition as a successful statewide collaborative grantmaking model.

- The Michigan AIDS Fund appointed its **first Executive Director**
- Governor John Engler responded to a request spearheaded by the Fund to declare the first week of April as **Michigan AIDS Awareness Week**
- **\$720,000** was awarded during the year to 43 AIDS-related community-based organizations
- To date, the Michigan AIDS Fund has **distributed over \$2.1 million** for HIV prevention and continuum of care services to combat the AIDS epidemic in Michigan
- Partnerships with youth advisory councils of community foundations generated **innovative HIV peer-education projects**

From 1981, when the first AIDS case was reported, until 1995, 6,607 people in Michigan were diagnosed with acquired immune deficiency syndrome (AIDS). Surveillance data indicate between 12,000 and 17,000 Michigan residents are infected with the HIV virus; many are unaware they carry the virus that causes AIDS. Commended as an exemplary U.S. philanthropic response to AIDS by White House

Director of AIDS Policy, Patricia S. Fleming, MAF has gained national recognition as a statewide collaborative grantmaking model dealing with this issue of urgent public health concern.

This year, MAF committed \$720,000 in grant awards to 43 AIDS-related organizations and sponsored the statewide Michigan Conference on AIDS. The conference was convened April 21-22, 1994 during "Michigan AIDS Awareness Week" in cooperation with the Michigan Department of Public Health. More than 180 active health care workers and volunteers working in HIV/AIDS attended the event held at the Holiday Inn Convention Center in Lansing. Eleven sessions included presentations on the skills-building topics of grant proposal preparation, nonprofit board development, program outcomes evaluation, current AIDS treatment issues, collaboration, support group activities, and working with the media.

### MAF Board of Trustees & Officers:

Glenn F. Kossick - Chair	Jay Kaplan
Dr. Michael Boucree	Jeanette Mansour
Dr. Frederick W. Bryant	Mark A. Miller
Robert S. Collier	Dr. Dexter Shurney
Carolee Dodge-Francis	Leonard W. Smith
Mary D. Fisher	Anne Stoll
Beth Goebel	Dr. Ira Strumwasser
Barbara J. Getz	Dr. Henrie M. Treadwell



*Patricia S. Fleming, White House Director of AIDS Policy, commended the work of the Michigan AIDS Fund, which has gained national recognition as a collaborative model.*

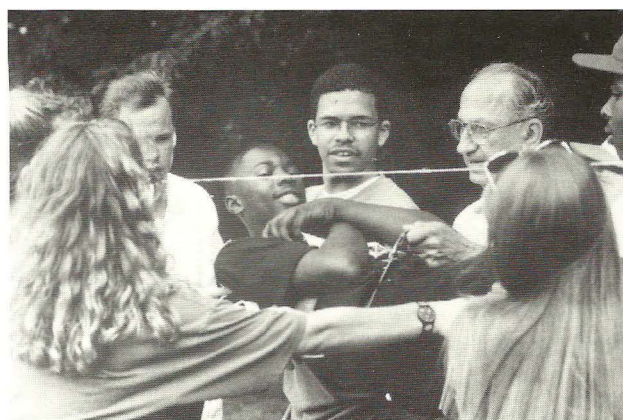


## Michigan Community Foundations' Youth Project (MCFYP)

The CMF Michigan Community Foundations' Youth Project was organized to carry out the project initiated with the W.K. Kellogg Foundation to foster the development of Michigan community foundations and youth involvement in grantmaking. The project offers challenge grants to community foundations meeting project criteria. MCFYP also oversees a companion grant from the Kellogg Foundation to assist community foundations in implementing information systems hardware and software.

- More than 1,000 young people are involved in "hands-on" philanthropy by serving on the **Youth Advisory Committees** of community foundations.
- More than 200 young people and adult advisors attended CMF's August 1994 three-day summer **Youth Leadership Conference**, "A Place for YOUTH to be YOUTH."
- In total, 234 young people attended one of four **Regional Training Workshops** held in different locations during the spring of 1995.
- **\$1,378, 823 in grants has been distributed** by Youth Advisory Committees since the inception of MCFYP. This figure represents 701 grants made by 39 Youth Advisory Committees.
- An issue of *Yackety YAC* was released.

There are now 47 community foundations and affiliates with active youth committees, involving 1,180 young people in philanthropy. Ten community foundations have raised the funds necessary to meet



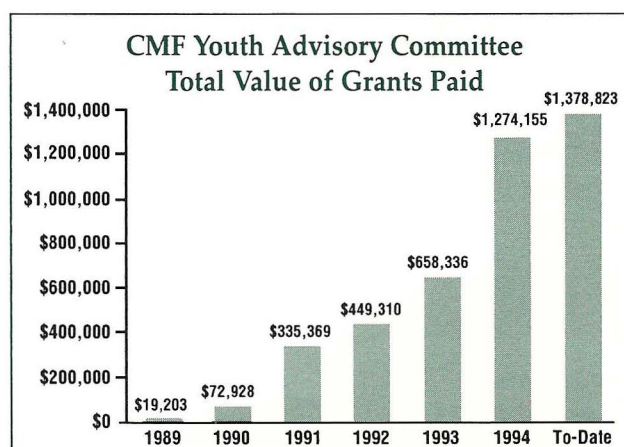
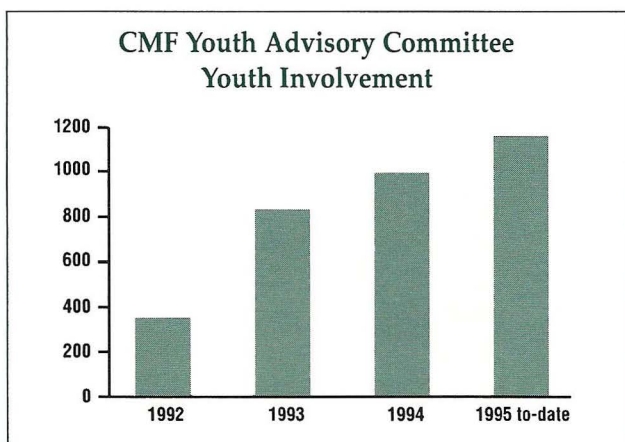
*"The Immersion" activity, a tradition of the Youth Leadership Conference, is a time for YAC members to develop team building and group skills. Above, participants learn about trust.*

the full match as required by the program. The Youth Advisory Committee members of these foundations can now distribute the interest earned from the \$1 million as grants to their community.

*Yackety YAC*, the newsletter for Youth Advisory Committees, was published by CMF and 1,500 copies distributed to youth committee members, adult advisors, and interested individuals.

## Computer Project

Last year, CMF assisted community foundations in launching a statewide computerization effort through a \$2.6 million W.K. Kellogg Foundation grant program. The program assists community foundations in purchasing hardware and software, and allows them to integrate donor, grantmaking and accounting functions. The effort was entered





into by seven "venture" community foundations: Battle Creek Community Foundation, Kalamazoo Foundation, The Grand Rapids Foundation, Community Foundation of Greater Flint, The Fremont Area Foundation, Muskegon County Community Foundation, and Community Foundation for Southeastern Michigan.

Progress on the implementation of the computer system and "FIMS" (the Foundation Information Management System) software for Michigan's community foundations has been exceptional. CMF's Computer Project has become a national model for collaboration in the community foundation field.

- There are now 33 community foundations at various stages of installation.
- CMF held a Computer-related Training Workshop.
- A computer consultant has been retained to assist in the implementation process and to troubleshoot for community foundations involved in the project.

### Other Related Initiatives

These initiatives compliment the Michigan Community Foundations' Youth Project (MCFYP) challenge grant and increase the ability of community foundations to work in innovative and collaborative ways in their communities.



*A YAC member attending the 1994 Youth Leadership Conference assists with a blood drive during the annual conference service project.*

The **Youth Community Partnership** is a collaborative effort with the Michigan Department of Civil Rights and the Martin Luther King, Jr. Commission. The Partnership provides mini-grants to CMF Youth Advisory Committees statewide to develop, support, and/or recognize programs or individuals that promote civil rights awareness and understanding, and encourage an appreciation for cultural diversity.

\* Eighteen projects were funded.

The **Michigan CARES** project, is a public/private partnership with the Michigan Community Service Commission. Michigan CARES is funded by the W.K. Kellogg Foundation and the Corporation for National and Community Service to assist six communities in developing comprehensive, collaborative plans for community service. The goal of Michigan CARES is to design a community planning model that will develop and enhance service projects, as well as strengthen relationships among community organizations, schools, businesses, local governments, and community foundations. Michigan CARES will also coordinate programs, provide resources and training, coordinate conferences, and implement creative solutions to problems which might arise with the six communities.

- \* Six CMF Member community foundations are participating in the Michigan CARES Project: Marquette Community Foundation, Community Foundation for Northeast Michigan, Muskegon County Community Foundation, Community Foundation of Greater Flint, The Grand Rapids Foundation, and the Community Foundation for Southeastern Michigan.

### MCFYP Board of Trustees & Officers:

John E. Marshall III - Chair	Dorothy A. Johnson
Diana V. Rodriguez Algra	Patricia B. Johnson
G. Darrin Carde	James M. Richmond
Frank Dirks	Diana R. Sieger
Diana Economy	Maureen H. Smyth
Timothy Jacobs	Eileen C. Starks
Charles A. Johnson	Peter P. Thurber



## OUR FINANCES

Board of Trustees  
Council of Michigan Foundations

We have audited the accompanying combined balance sheet of the Council of Michigan Foundations and supporting organizations as of March 31, 1995, and the related combined statement of activity and changes in fund balances for the year then ended. These financial statements are the responsibility of the Council's management. Our responsibility is to express an opinion on these financial statements based on our audit. We have previously audited and reported upon the March 31, 1994 financial statements, which are included in summary form for comparative information.

We conducted our audit in accordance with generally accepted auditing standards. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free of material misstatement. An audit includes examining, on a test basis, evidence supporting the amounts and disclosures in the financial statements. An audit also includes assessing the accounting principles used and significant estimates made by management, as well as evaluating the overall financial statement presentation. We believe that our audit provides a reasonable basis for our opinion.

In our opinion, the financial statements referred to above present fairly, in all material respects, the combined financial position of the Council of Michigan Foundations and supporting organizations at March 31, 1995, and the combined results of their operations for the year then ended in conformity with generally accepted accounting principles.

*Ernst + Young LLP*

May 5, 1995

## Combined Statements of Activity and Changes in Fund Balances

Year ended March 31, 1995

	General Operations	Supporting Michigan Community Foundations Youth Projects
<b>Support and revenues</b>		
Grant support		\$7,933,584
Contributions	\$ 896,157	
Conferences	204,920	
Workshops	25,126	17,388
Publications	69,604	2,795
Software installation fees		15,000
Management services (Note D)	762,897	
Investment income and other	22,388	747,861
Total support and revenues	1,981,092	8,716,629
<b>Expenses</b>		
Grants	158,332	7,051,085
Salaries and benefits	741,542	
Contracted services	250,525	
Conferences	156,496	
Workshops	101,365	
Printing and publications	108,530	
Meetings and travel	101,708	
Telephone and postage	86,430	
Mini-grant activities	65,774	
Equipment lease and maintenance	14,271	
Occupancy (Note A)	68,549	
General supplies	55,833	
Books and subscriptions	9,023	
Insurance	8,382	
Depreciation	72,604	
Other expenses	25,714	
Fund for the '90s	19,072	
Management services (Note D)		755,397
Total expenses	2,044,150	7,806,482
Support and revenues over (under) expenses	(63,058)	910,147
Fund balances at beginning of year	532,834	-
Other transfers (Note F)	600,096	(592,100)
Fund balances at end of year	\$1,069,872	\$ 318,047

See accompanying notes to combined financial statements.

## Council of Michigan Foundations and Supporting Organizations

### Notes to Combined Financial Statements

March 31, 1995

#### Note A—Summary of Significant Accounting Policies

**Statement Presentation:** The accompanying combined financial statements have been prepared on the accrual basis of accounting. To ensure observance of restrictions placed on the use of available resources, the accounts and financial activity are classified for accounting and reporting purposes into three fund groups:



## Organizations

Michigan AIDS Fund	Endowment Funds		Eliminations	Totals	
	Russell G. Mawby Endowment Fund	William W. Allen Endowment Fund		Year ended March 31 1995	1994
\$753,850				\$ 8,687,434	\$2,611,772
11,085	\$351,033			1,247,190	704,681
				216,005	240,471
				42,515	50,058
				72,399	20,077
				15,000	
			\$(762,897)		
31,611	6,766	\$ 4,721		813,347	59,388
796,546	357,799	4,721	(762,897)	11,093,890	3,686,447
639,080				7,848,497	1,829,259
72,692				741,542	538,398
40,967				323,217	394,941
				197,463	263,730
				101,365	50,800
3,766				112,296	80,029
16,746				118,454	84,890
7,191				93,621	61,037
				65,774	29,696
				14,271	4,151
				68,549	59,112
8,604				64,437	50,861
				9,023	11,772
				8,382	8,101
				72,604	45,711
				25,714	4,639
				19,072	50,341
7,500			(762,897)		
796,546			(762,897)	9,884,281,	3,567,468
-0-	357,799	4,721	-0-	1,209,609	118,979
-0-	-0-	73,790		606,624	487,645
		(7,994)			
\$ -0-	\$357,799	\$70,517	\$ -0-	\$ 1,816,233	\$ 606,624

- General Operations is used to account for transactions, substantially all of which are unrestricted gifts and contributions and over which the Board of Trustees has full control as to use in pursuing any of the purposes of the Council of Michigan Foundations (the Council). Certain restricted funds related to operating activities are accounted for in the general operations fund group since they are not sufficiently significant to warrant recognition separately.

- Supporting Organization Funds are used to account for the activity of two supporting organizations formed during fiscal 1994. The supporting organizations are funded by donor-restricted grants, gifts and contributions. Grant revenue restricted by outside sources is recognized to the

extent related expenses are incurred. The unexpended grant funds have been recorded as deferred revenue in the accompanying balance sheets.

- Endowment Funds are used to account for gifts established with the intent that the principal be permanently invested and only the earnings thereon be expended for stated purposes.

### Supporting Organizations

During fiscal 1994, the Michigan Community Foundations' Youth Project and the Michigan AIDS Fund became supporting organizations to the Council under the provisions of Section 509(a)(3) of the Internal Revenue Code. The accompanying financial statements of the Council have



# Council of Michigan Foundations and Supporting Organizations

## Combined Balance Sheets

	1995	March 31	1994
<b>Assets</b>			
Cash	\$ 30,036		\$ 43,428
Investments, at market (Note C)	17,061,823		16,336,984
Accrued investment income	175,953		
Fixed assets, net of accumulated depreciation (\$284,921 in 1995 and \$212,316 in 1994)	630,978		225,556
Other assets	22,451		
<b>Total assets</b>	<b>\$17,921,241</b>		<b>\$16,605,968</b>
<b>Liabilities and fund balances</b>			
Amounts due to member organizations			\$ 131,713
Accounts payable	\$ 14,836		
Deferred revenue (Note B):			
General operations	60,307		47,379
Kellogg Youth Project II			313,558
Michigan AIDS Fund	729,556		843,425
Michigan Community Foundations' Youth Project	15,300,309		14,663,269
Fund balances:			
General operations:			
Unrestricted	438,894		307,278
Net investment in fixed assets	630,978		225,556
	1,069,872		532,834
Michigan Community Foundations' Youth Project	318,045		
Endowment funds	428,316		73,790
	1,816,233		606,624
<b>Total liabilities and fund balances</b>	<b>\$17,921,241</b>		<b>\$16,605,968</b>

See accompanying notes to combined financial statements.

been prepared on a combined basis to include its affiliated supporting organizations because the Council's Board of Trustees exercises significant control over these organizations through the appointment of board members for each of these organizations.

**Fixed Assets:** Fixed assets, which are composed of office space, furniture and equipment, are stated at estimated market value at the date donated or at cost, if purchased. Depreciation is computed by the straight-line method over the estimated useful lives of the assets.

**Contributed Rent and Furnishings:** The Council leases office space at amounts (\$22,700 in 1995 and \$21,800 in 1994) less than estimated fair rental value. The difference between the estimated fair rental value of the office space and total occupancy costs is approximately \$37,700 in 1995 (\$38,100 in 1994), which is recognized as a contribution and occupancy expense in the accompanying combined financial statements.

The Council received furnishings for new office space in 1995 at an amount less than estimated fair market value. The difference between the estimated fair market value of the office furnishings and actual cost was approximately

\$35,500, which is recognized as a contribution and fixed asset costs in the accompanying combined financial statements.

**Reclassifications:** Certain amounts reported in the 1994 financial statements have been reclassified to conform with the 1995 presentation.

### Note B—Fund Purposes

**General Operations:** Amounts classified as General Operations include revenues and expenses related to the administrative and service activities of the Council.

### Supporting Organizations

*Michigan Community Foundations' Youth Project:* During fiscal 1994, the Council formed a supporting organization (Michigan Community Foundations' Youth Project) for the primary purpose of administering a project commencing in 1988 that was funded by the W. K. Kellogg Foundation. The project is aimed at encouraging youth development in local communities while strengthening community foundation leadership and grantmaking capacity. The Council has acted as administrator of the original project, with all grant monies received from the W. K. Kellogg Foundation being



distributed to community foundation members under conditions defined by the grant agreement.

The Michigan Community Foundations' Youth Project was incorporated on November 24, 1993 with a separate Board of Trustees to oversee the grantmaking activities of this project. The W. K. Kellogg Foundation transferred approximately \$15,000,000 to the supporting organization at the end of fiscal 1994, and transferred approximately \$4,500,000 in fiscal 1995, completing the W. K. Kellogg Foundation's project commitment to this initiative.

The Council also received a three-year grant totaling \$350,000 from the Charles Stewart Mott Foundation to assist in funding this project. The Michigan Community Foundations' Youth Project received the final payment of \$100,000 under this award during fiscal 1995.

The Michigan Community Foundations' Youth Project also received a \$2,600,000 grant in fiscal 1995 from the W. K. Kellogg Foundation to provide funds for the computerization of Michigan's community foundations, support for foundations which assume responsibility for assisting small affiliate community foundations in their development, and extended support for the youth project, including camp subsidies and national leadership conference funding.

*Michigan AIDS Fund:* The Council formed a supporting organization during fiscal 1994 for the purpose of managing and administering revenues and expenses of a collaborative funding grant program, previously administered by the Council, which acts as a vehicle for Council members and others to cooperatively fund AIDS-related projects in Michigan. The supporting organization has a separate Board of Trustees to oversee the growing activities and grantmaking responsibilities of this program.

#### Endowment Funds

*Russell G. Mawby Endowment Fund:* The Russell G. Mawby Endowment Fund was established during fiscal 1995 to honor Dr. Mawby's contributions to Michigan philanthropy. Dr. Mawby, Chairman and CEO of the W. K. Kellogg Foundation, was the founder of the Council of Michigan Foundations and served as its first Chairman in 1972. The purpose of this fund is to improve and increase philanthropy by continuing and expanding the Council of Michigan Foundations' efforts to enhance philanthropy and increase charitable resources. The principal amount is nonexpendable, with the investment income to be used for the stated purpose of this fund.

*William W. Allen Endowment Fund:* The purpose of this fund is to record revenues and expenses directed toward furthering the understanding of private philanthropy in federal and state legislative and regulatory matters. The endowment was established with restricted contributions from the member foundations of the Council given in honor of a former Council board member who was also the first Government Relations Chairman. The principal amount is nonexpendable, with the investment income to be used for the stated purpose of this fund.

#### Note C—Investments

Investments are presented in the combined financial statements at their aggregate market value and comprise the following:

	1995		1994	
	Cost	Market	Cost	Market
U.S. Treasury securities	\$10,662,109	\$10,630,020		
Money market investments	6,353,292	6,353,292	\$16,263,194	\$16,263,194
Investment Management account	80,396	78,511	76,468	73,790
Totals	\$17,095,797	\$17,061,823	\$16,339,662	\$16,336,984

#### Note D—Management Services Agreement

An administrative services agreement exists between the Council and its supporting organizations. The administrative agreement requires the Council to provide executive, management, administrative and other such services that the supporting organizations may require. The amounts of these services charged to the supporting organizations are eliminated in the preparation of the combined financial statements.

#### Note E—Federal Tax Status

The Internal Revenue Service has ruled that the Council is a public charity, as described in Sections 509(a)(1) and 170(b)(1)(A)(vi) of the Internal Revenue Code. The Internal Revenue Service has also ruled that the two supporting organizations, the Michigan Community Foundations' Youth Project and the Michigan AIDS Fund, are exempt from federal income tax as specified under the provisions of Section 509(a)(3) of the Internal Revenue Code.

#### Note F—Transfers to General Operations

Transfers to General Operations represent amounts used primarily for the purchase of additional office space, to make necessary renovations and to complete the computerization of the Council's offices.

#### Note G—Commitment

As a result of expanded programming, the Council entered into an agreement in principle to purchase additional office space at its current location. It is anticipated that the Council will enter into a purchase agreement subsequent to March 31, 1995 committing the Council to pay approximately \$130,000 upon closing. The Council expects to take possession of the office space in June 1995. The facility will be financed entirely by unrestricted investment earnings on Michigan Community Foundations' Youth Project funds.



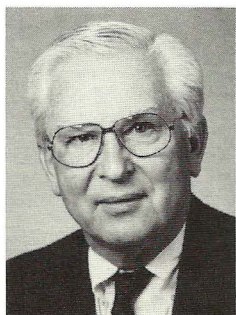
## OUR LEADERSHIP

The Council of Michigan Foundations is governed by a 26-member Board of Trustees. These individuals, who serve without remuneration, are elected at the Annual Members' Meeting, held during the CMF Annual Conference in November. More than 190 ballots were received from CMF Members.

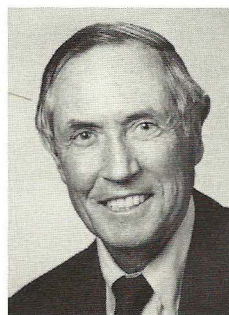
In addition to the November 2, 1994 meeting, the CMF Board met June 9-10, 1994, and August 11, 1994.



### CMF BOARD OF TRUSTEES AND OFFICERS



**Chair**  
**Herbert H. Dow**  
President & Trustee, The Herbert H. & Grace A. Dow Foundation  
President & Trustee, The Herbert H. & Barbara C. Dow Foundation  
Midland



**Vice Chair - Private**  
**Peter P. Thurber**  
President, David M. Whitney Fund  
Trustee, Community Foundation for Southeastern Michigan  
Trustee, McGregor Fund  
Detroit



**Vice Chair - Corporate**  
**Donald R. Parfet**  
Executive Vice President for Administration, The Upjohn Company  
President & Trustee, The Upjohn Company Foundation  
Kalamazoo



**Treasurer**  
**Patricia B. Johnson**  
President & Secretary, Muskegon County Community Foundation  
President, Oceana County Community Foundation  
Trustee, Paul C. Johnson Foundation  
Muskegon

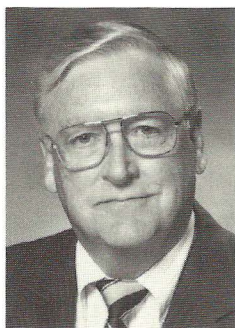


**Vice Chair - Community Foundations**  
**Mariam C. Noland**  
President, Community Foundation for Southeastern Michigan  
Detroit



**President, Secretary & Trustee**  
**Dorothy A. Johnson**  
Council of Michigan Foundations  
Grand Haven





**Leo J. Brennan, Jr.**  
Executive Director, Ford Motor  
Company Fund  
Dearborn



**Judith S. Hooker**  
Vice President, Robert L. & Judith S.  
Hooker Foundation  
Grand Rapids



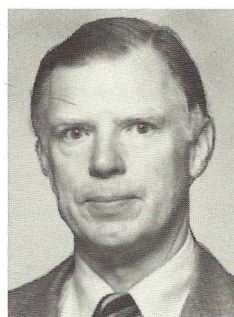
**Robert S. Collier**  
Executive Director, Rotary Charities of  
Traverse City  
Executive Director, Grand Traverse  
Regional Community Foundation  
Traverse City



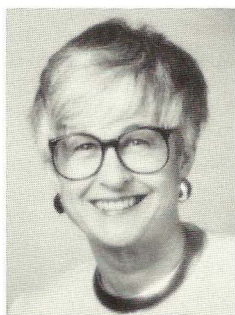
**Dr. Jack E. Hopkins**  
President and CEO, Kalamazoo  
Foundation  
Kalamazoo



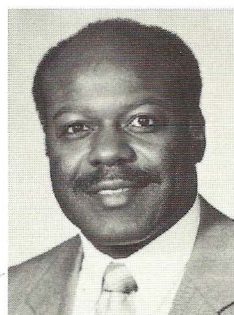
**Laura A. Davis**  
Vice President-Corporate Affairs and  
Corporate Secretary, W.K. Kellogg  
Foundation  
Battle Creek



**Gilbert Hudson**  
President, Hudson-Webber Foundation  
Detroit



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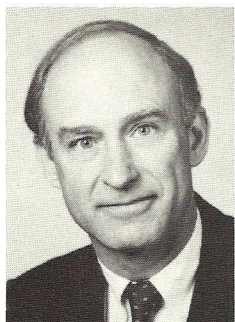


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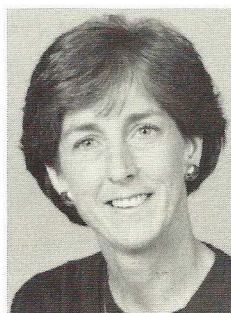
**John E. Marshall, III**  
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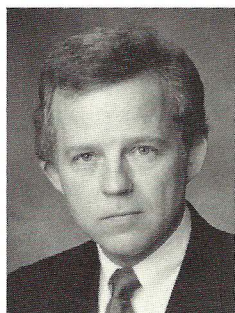
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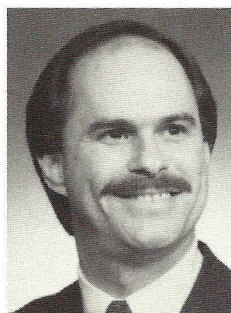
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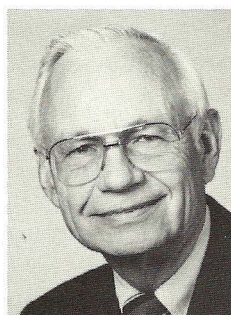
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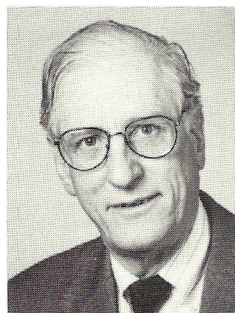
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Fenton Fund  
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**Frankenmuth**

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\*In 1994-95, 86 Members contributed additional support to CMF for special projects, as well as their regular membership fees.



Legal services provided by: Clark, Klein & Beaumont, Detroit  
Produced by: Robert E. Hency  
Compiled and written by: Judy M. Carl

 Printed on Recycled Paper





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