



**CELEBRATING  
IMPACT**  
IN MASON COUNTY





## MISSION

To engage donors and connect them with opportunities to **make a lasting impact**, build community endowment, provide leadership on key issues, and make grants that reflect the communities we serve.

## VISION

Be a leader in community philanthropy to **build a vibrant community** with great opportunities for all.

**FOR GOOD. FOR EVER.**



## LETTER FROM LEADERSHIP

As we enter the second year of the Community Foundation's strategic plan, we celebrate the successes and recognize the collective efforts of many community partners and donors.

As we share highlights of the great work happening, you will find stories of people like you and me who appreciate our community and look to the future with a promise for a **better tomorrow for all**.

This year our tradition of grantmaking and partnering on community projects was focused on the strategic priorities identified by our community. Thanks to YOU, our community partners, we celebrate strategic efforts to:

- **Develop Financial Literacy** and improve awareness and access to post secondary education.
- **Strengthen Individuals and families** through access to safe and affordable housing and transportation.
- **Support Recreation Opportunities** that are accessible to all.
- **Develop Youth Leadership** in philanthropy to build the next generation of leaders for a stronger, more caring community.

Together, as we walk alongside each other, the people of Mason County can look to the future with hope and opportunity.

We thank **YOU** our community for being our continued partner in loving this special place we get to call home.

Sincerely,



**Andrea Large**  
Executive Director



**Patti Klevorn**  
Chair, Board of Trustees

## HIGHLIGHTS FROM 2022

### Gifts Received:

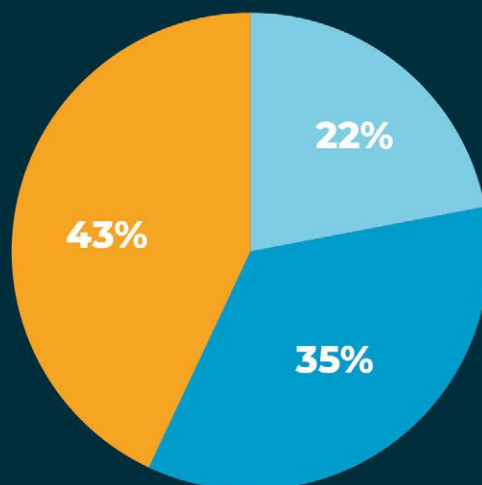
\$2,085,825

### Grants & Scholarships Awarded:


\$880,021

### Total Assets:

\$22,761,608



### Strategic Funding

-  Improve Workforce Supports
-  Community Development
-  Advancing Educational Attainment

## KICKSTART TO CAREER

Financial planning is a key component for anyone planning to continue their education. Our **KickStart to Career Program** aims to do just that by providing students with a child savings account along with financial planning lessons to help arm them with tools they will need to plan for their future.

Seed funding, thanks to the **John & Anita Wilson Family Fund**, of \$50 goes into each Kindergarten student's account with opportunities for match and incentive funds. Currently **over 1,200** Mason County kindergarten, first, second and third grade students have bank accounts to use toward career training helping build hope and opportunity for a bright future.

This summer, thanks to a grant from the **Patrick & Maria O'Hare Fund and Robert R. & Joan Hasenbank Fund**, third grade students will have the opportunity to earn incentive dollars for their accounts for completing a geography license plate search in Mason County.

## MADE POSSIBLE BY THE:

### Initial Seed Deposit:

- John & Anita Wilson Family Fund

### Match & Incentive Dollars:

- West Shore Bank
- Lake Michigan CPA Services
- Nader's Motel & Suites
- Adam & Christine Lamb
- Scottville Optimist Club
- Ludington Optimist Club
- Ludington Shop With a Cop Program
- Safe Harbor Credit Union
- Joan Hasenbank
- Mary Church



## CELEBRATING EDUCATION

## WESTSHORE CTE & ME DAY

In an effort to begin career exploration earlier in students' education, local school districts, West Shore Education Service District, West Shore Community College and the Community Foundation along with many local businesses supported a CTE & Me event to introduce third grade students across our region to their Career Technical Education (CTE) and community college programs.

A grant from the **Greater Mason County Fund** helped provide the opportunity for students to learn about careers within six career zones including:

- Arts & Communication
- Health Sciences
- Human Services
- Natural Resources & Agriscience
- Business, Management, Marketing & Technology
- Engineering/Manufacturing & Industrial Technology



# SCHOLARSHIP OPPORTUNITIES

The Community Foundation awarded scholarships to **67 Mason County students**, including renewals, which represents commitments over the next four years of **\$286,400**. Adding to that support for students this year will be the Drs. Ruth and John Carney and Irene Carney Kendrick Memorial Scholarship.

Dr. John Carney was a fixture in the Ludington community for over 70 years. He and his wife, Dr. Ruth Carney met in medical school at the University of Michigan and married in 1944. After a few years working in Los Angeles and Ann Arbor, they finally settled in Ludington - the "city of their dreams."

The Carneys' love for this community ran deep. In a conversation early in their marriage, Ruth told John, "I'd rather live in Ludington than any place in the world," and he agreed. They bought a house, turned part of it into an office, and got right to work. Both later held positions in local hospitals before they started a family practice that would operate for the next 42 years.

Eleanor Anderson—a nurse and longtime colleague of the Carneys—experienced this firsthand. John encouraged her to go back to school to become a nurse practitioner and then offered her a job at the family practice. She worked alongside him until his retirement. "It was a real compliment that they wanted me to join their practice," said Eleanor. "Dr. Carney was a great teacher."

After a lifetime of community service, Ruth passed away in 2000. In the ensuing years, John married June Strahan, co-authored a book, and enjoyed time playing golf, racquetball, and bridge. He died in 2022 at the age of 100.

A gift made through his estate created **two funds** at the Community Foundation to carry on his family legacy and support local students. John's encouraging spirit lives on in the two funds he created.

## DRS. RUTH & JOHN CARNEY & IRENE CARNEY KENDRICK MEMORIAL SCHOLARSHIP

The Drs. Ruth and John Carney and Irene Carney Kendrick Memorial Scholarship — established in memory of his first wife and their late daughter — creates opportunities for adult students, students pursuing postgraduate degrees, or those facing barriers to getting a college degree. The Drs. Ruth and John Carney Education Fund is a field-of-interest fund designed to address the diverse and changing educational needs in Mason County for generations to come.





# CELEBRATING **WORKFORCE SUPPORT**

## **HOUSING NEEDS ASSESSMENT**

Mason County lacks a county-wide perspective on housing development needs. With the convening of local leaders, we will invest in a **housing needs assessment**. This will provide data to prioritize residential development and ensure that everyone has safe, affordable housing.



## UNITED WAY **AUTO LOAN PROGRAM**

A grant from the Greater Mason County Fund provided seed funding to United Way of Mason County to create a transportation loan fund available to employees of the **Lakeshore Employer Resource Network (LERN)**.

Loans are available at **0% interest** with a reasonable payback schedule. This valuable resource has helped employees maintain their employment by removing transportation barriers.



## RIDES TO WELLNESS

Transportation can be a barrier to health and wellness for many in our community. Grants from the Rick & Mary Ann Randall and Greater Mason County Funds provided seed funding to pilot the **Rides to Wellness Program**.

This program provides transportation, through **Ludington Mass Transit Authority (LMTA)**, for seniors and residents with disabilities to non-emergency medical appointments in Mason County. Rides-to-Wellness has provided services to seven townships including Hamlin, Amber, Branch, Freesoil, Riverton, Custer, and Victory.

Prior to the start of the program, transportation services would have been unavailable to residents in these areas. As of the end of 2022, there had been **334 trips** since the start of the program in April of 2022. We are so proud to partner with LMTA!

**Rides to  
Wellness**



“

This program has **given me my independence back...**

Before this was available my daughter would need to help me get out to the vehicle I was taking to my appointment that day and then she would take my scooter back into our house. With the vans having the lifts, I am able to go to my appointments on my own and take my scooter with me without assistance.

- Diane Sommerfeldt, Rides to Wellness

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# CELEBRATING **RECREATION**

## **HAMLIN BEACH ACCESSIBILITY**

The beach walkway at Lake Michigan is heavily used by people of all abilities, just as the ones the City of Ludington has at Stearns Park. For some it is a matter of convenience, for others it's essential. Input from accessibility advocates Jamie Spore and Shelby Soberalski and a grant from Jeanne Oakes along with matching funds from the Michigan DNR made the **addition of a walkway** for use on the Ludington State Park's Hamlin Lake Beach as well as **two new beach wheelchairs** a reality.



## **YOUTH SAILING SCHOOL**

The **Ludington Youth Sailing School's** mission is to introduce Mason County youths to the sport of sailing and promote comfort on the water. Grants from the Ludington Youth Recreation and Greater Mason County Fund supported improvements to the sailing instruction site to increase safety as well as instruction and practice time during each learning session. This year **157 sailors**, up from 40 participants last year, learned about water safety, gained confidence and skill on the water and became acquainted with the Coast Guard and Mason County Sheriff's Department Marine Patrols.



## AFTER-SCHOOL ART VENTURES

The **Ludington Area Center for the Arts (LACA)** strives to promote the arts within our community. This year grants from the **Patrick & Maria O'Hare and Greater Mason County Funds** supported after-school youth art programming including a variety of themed workshops each week, snacks, and transportation from Ludington Elementary School.

Over **54 students** from schools across Mason County have taken advantage of this opportunity. In addition to feeding the creative spirit in area youth this program has served as a form of safe and affordable after-school care, which is needed in our community.



"My daughter loves the **After-School Art-Ventures!** We love that there are different classes offered so she can switch it up monthly, and she always comes home with super fun projects! I love that she can ride the bus right from school and I don't have to worry about transportation. Five stars!"

- Courtney Walters, Mother of 2nd Grade Participant

## PERE MARQUETTE CONSERVATION PARK

Pere Marquette Charter Township acquired **290 acres** along the Pere Marquette River and Lake Michigan with the vision of creating the **Pere Marquette Conservation Park**, a regional destination where natural resources are protected and the community can enjoy outdoor recreation. **Phase I** of this project is construction of a new Community Access Site at the mouth of the Pere Marquette River, providing boating and barrier free pedestrian fishing and wetlands observation access for area residents and visitors.

With the support of the Community Foundation, Land Conservancy of West Michigan, Dow, Inc., Pennies from Heaven Foundation, and a gift from the Thomas William Paine Charitable Fund, the Township established the Pere Marquette Conservation Park Development Fund to support this effort.

Please **consider a gift** to support this project that will benefit our community forever!

VIEW THE PARK'S  
MASTER PLAN!



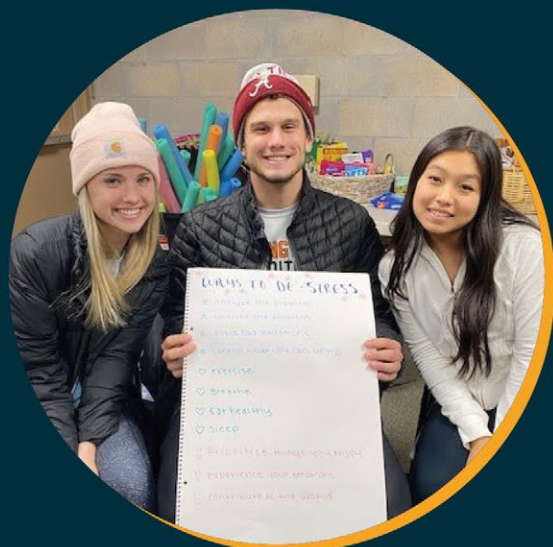


# CELEBRATING OUR YOUTH

## YOUTH ADVISORY COUNCIL

During their fall retreat at Grace Youth Adventure Camp, the Community Foundation's Youth Advisory Council (YAC) worked to address the three top concerns of area youths. Based on a county-wide survey of their peers, these areas included **academic stress, mental health, and substance abuse.**

The YAC decided to create a **public service announcement** focused on strategies for teen stress to share in our area schools, social media, and our local movie theater. Be on the lookout for their PSA this summer!



Building the **next generation of givers** for years to come.



They also responded to the needs of their peers by recommending grants to **Mason County Eastern School District** to support an academic planning program with a focus on stress reduction and to **West Shore Educational Service District** for a Math & Mentors program to build a love of math through games, along with teacher mini-grants to create innovative learning experiences. Some examples include salmon in the classroom, STEM bins for cooperative learning, Michigan Fisheries and Design, book tasting event, and more.

They also award **\$500 grants** for the All Around Seniors in each school district to give to the nonprofit of their choice; a tradition started by Katie Biggs, 2015 Ludington All Around Senior.





**GIVE**



**GROW**

The YAC recommends grants from the **Mason County Youth Advisory Council Fund**, which was started in 1996 when community foundations earned a matching grant from the W.K. Kellogg Foundation.

**Scan the QR code** for a full list of grants awarded in 2022!



To learn more about YAC, visit **[mason-foundation.org](https://mason-foundation.org)**.



# CELEBRATING GIVING

Thank you to the people who notified us of **planned gifts** through their estates or created **new funds** in 2022. These gifts will do great things in our Mason County community ... **forever.**

## PROMISED GIFTS

- Richard Laird & Patricia Rambasek
- Jennifer Miller & Dan Reum
- Dr. John Carney
- Gene & Ruthann Kyle
- Susan Bogart & Dan Petterson

## NEW FUNDS

### **Clinton & Lila Coleman and Charles & Margaretta Reader Fund**

Richard and Cathy Reader grew up in Mason County and both of their families have been a part of this community for more than 100 years. They wanted to give back to the community that has meant so much to their families, so they established a Fund for the Community in honor of their parents, Clinton & Lila Coleman and Charles & Margaretta Reader, that will support the needs and opportunities in Mason County forever.

### **Pere Marquette Conservation Park Development Fund**

Learn more on page 9.

### **Scottville Optimist Fund**

The Scottville Optimist Club has served the Scottville community for 70 years in promoting opportunities for youth. They established the Scottville Optimists Fund to provide sustainability for their work now and for years to come.

### **Drs. Ruth & John Carney & Irene Carney Kendrick Memorial Scholarship Fund**

Learn more on page 5.

### **Drs. Ruth & John Carney Education Fund**

Learn more on page 5.

### **Horizon Financial Fund**

Working with clients on pursuing their financial goals in Northern Michigan since 1992, Holly Gallagher, principal of Horizon Financial, is savvy with her own investing and generosity, too. She created this Fund for the Community that will support the emerging needs and opportunities in Mason County forever.

### **Susan Bogart & Dan Petterson Build a Fund**

Susan and Dan are known for their work with children and families. They started this Build a Fund to support the causes they care about. Their planned estate gift will continue their legacy by creating a Field of Interest Fund to support education and human service focused programs and projects so the community they love will always have their support.



## **Mark Boon Ludington Schools Student Resource Fund**

Mark Boon has served the Ludington community for 50 years. He was named the All Around Senior of his Ludington High School graduating class and continued his legacy with the District as a teacher and principal. Now retired, Mark continues this work, and the Mark Boon Ludington Schools Student Resource Fund will ensure that children and families of the Ludington School District will always have support.

## **Pere Marquette Memorial Cross Fund**

The Pere Marquette Memorial Association (PMMA) launched a campaign to repair and preserve the Father Marquette Memorial, located on Buttersville Peninsula. With that project now complete, the Pere Marquette Memorial Association, with support from the Pennies from Heaven Foundation, established the Pere Marquette Memorial Cross Fund to provide a permanent resource for the long-term maintenance of this historical area of our community.

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**With more than 183 different funds, the Community Foundation offers multiple ways to support good work in our community.**

## **COMMITTEE ADVISED FUNDS:**

*Allows organizations to be involved in selecting what projects they want to support locally.*

- Epworth Fund for Ludington
- Lakeshore Food 4 Kids Fund
- Ludington Area Rotary Fund
- Mason County Eastern Schools Athletic Boosters Fund

## **COMMITTEE ADVISED FUNDS (CONTINUED):**

- Mason County Veterans Endowment Fund
- Sabin Petunia Parade Endowment Fund
- Scottville Optimist Fund
- Triad Endowment Fund

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## **ORGANIZATION ENDOWMENT FUNDS:**

*Support the operational costs of organizations.*

- A Few Friends for the Environment of the World Fund
- American Red Cross Fund, West Shore Chapter
- Big Sable Point Lighthouse Fund
- City of Scottville Cemetery Perpetual Care Fund
- COVE Mason Endowment Fund
- Robert Dickson MCD Library Endowment Fund
- Disability Network West Michigan Mason Fund
- Emanuel Lutheran Missionary Support Fund
- Habitat for Humanity of Mason County
- HELP Ministry Fund
- Ludington All Sports Booster Club Fund
- Ludington Area Catholic Educational Foundation Faith Formation Fund
- Ludington Area Catholic School Fund
- Ludington Area Arts Council Endowment Fund
- Ludington Area Catholic Educational Foundation Tuition Relief/Scholarship Fund
- Ludington Rotary Strive Fund
- Ludington Soccer Club Fund
- Oriole Community Tennis Courts Maintenance Fund
- Mason County Central Educational Foundation Endowment Fund
- Mason County Eastern Educational Fund
- Mason County Sports Hall of Fame Fund
- Mason County Historical Society Endowment Fund
- Mason-Lake Conservation District Fund
- Mason County Promise Fund



## ORGANIZATION ENDOWMENT FUNDS (CONTINUED):

- Mason County Walleye Association Fund
- Oakview Medical Care Facility Fund
- Oriole Foundation Fund
- Pere Marquette Memorial Cross Fund
- Sandcastles Children's Museum Endowment Fund
- Scottville Clown Band George F. Wilson Endowment Fund
- Spectrum Health Foundation Ludington Fund
- United Way of Mason County Endowment Fund
- Western Michigan Fair Association Fund
- Zonta/Shirley Smedley Memorial Endowment Fund

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## BUILD A FUNDS:

*Provide an opportunity for donors to start a fund over time to support the causes they care about.*

- Susan Bogart & Dan Petterson Build a Fund

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## COMMUNITY PROJECT FUNDS:

*Support the administration of a specific program or capital campaign.*

- G2S Academy Capital Campaign Fund
- KickStart to Career Mason County Fund
- Ludington Area Arts Council Non-Endowed Fund
- Mason College Access Fund
- Pere Marquette Conservation Park Development Fund
- Sable Points Lighthouse Keepers Association Capital Campaign Fund
- Scottville Optimist Park & Sculpture Fund
- YAC Lake Jump Fund

## DESIGNATED FUNDS:

*Provides donors with a tool to make a specific local impact.*

- Childhood Cancer Campaign Fund
- Sheriff Kim Cole Legacy Fund
- Ludington Dog Park Maintenance Fund
- Ludington Waterfront Park - Sculpture Maintenance Fund
- Mason County Community Mental Health Fund
- Howard D. Olson, Sr. Memorial Fund
- Elmer & Rose Peterson Memorial Fund
- Pere Marquette Conservation Park Fund
- Geri and Harold Rohrmoser Fund
- Arts People (TAP) Fund
- Urka Family Fund

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## DONOR ADVISED FUNDS:

*Allows donors to be involved in selecting what organizations and projects they want to support locally.*

- Accessibility for Mason County Fund
- Robert and Mary Anne Andrews
- Raymond A. Biggs Family Fund
- Don Birtwistle Fund
- Blue Hat Ministries Fund
- Mark Boon Ludington Schools Student Resource Fund
- Paul Bromley Memorial Fund
- Dick and Anne Caldwell Fund
- Change Parts, Inc. Fund
- Thomas A. Coleman Donor Advised Fund
- Donald & Janice Fallis Fund
- Friends of the Ludington State Park Fund
- Friends of Mason County Sheriff Office Fund
- Marty & Jenny Gamble Fund
- Gateway to Success Academy All Around Senior Fund
- Dave and Sandy Gibbs Fund
- Good Neighbor Endowment Fund



# WAYS TO GIVE

Make a gift to the **Greater Mason County Fund** that can be used to address community needs and opportunities now and in the future.

- Direct your gift to one of the Community Foundation's existing funds that best matches your charitable interests.
- Start your own fund to achieve your charitable goals.
- Honor or memorialize a friend or loved one with a gift in their name.
- Remember the Community Foundation with a legacy gift in your will or trust.

## For more details on giving:

[mason-foundation.org](http://mason-foundation.org) | 231.845.0326

READY TO MAKE  
A DIFFERENCE?



**GIVE**  
TODAY!

LEAVE A **LEGACY**





## **DONOR ADVISED FUNDS (CONTINUED):**

- Dr. Joe & Kathy Grierson Fund
- Dave & Chrissie Hall Fund
- Hardman Construction Fund
- Al and Carole Hardman Fund
- Robert R. and Joan Hasenbank Fund
- Nancy Hesting Fund
- Human Trafficking Prevention & Victim Support Fund
- Marlene A. Haliburda Ladd Fund
- Tim & Andrea Large Fund
- Leibole Family Fund
- Letha Fulton School of Dance Fund
- Love Ludington Fund
- Lowing Family Fund
- Ludington All Around Senior Fund
- Ludington Beverage Company Fund
- Mason County Central All Around Senior Fund
- Mason County Eastern All Around Senior Fund
- Mason County Sheriff's Office Association Fund
- McKnight Family Fund
- Carol Nunn Nelson Fund
- Mike and Jeanne Oakes Fund
- Noah Oakes Fund
- Patrick and Maria O'Hare Fund
- Bob Parker Music Enrichment Fund
- Thomas F. and Gayle F. Peacock Fund
- Frank R. Petersen Community Fund
- Brad, Julia & Ethan Reed Family Fund
- Larry and Vada Reed Donor Advised Fund
- Milan and Dorothy Reed Family Fund
- Milan S. "Budde" and Sheryl Reed II
- Joseph and Janet Sanders Family Fund
- Scatena Family Fund
- Todd and Julie Schrader Family Fund
- Margaret Shaw Memorial Fund
- Becky Sopha Community Music Fund
- David K. Stites Fund
- West Shore Amateur Hockey Association Fund
- West Shore Bank Spirit of Giving Fund
- John and Anita Wilson Family Fund

## **FIELD OF INTEREST FUNDS:**

*Address a cause or an area of concern.*

- Bob and Kay Neal Fund
- Lee and Joan Schoenherr Fund
- Drs. Ruth & John Carney Education Fund
- Tom Coleman Fund
- Five Friends Fund
- Gerald and Dorothy Heslipen Fund
- Thomas L. Horowski Memorial Fund
- Stanley Kleinstein Youth Recreation Fund
- Ludington Lions Club Fund
- Mason Youth Advisory Council
- Ludington Area Foundation Recreation Fund
- Rick and Mary Ann Randall Fund
- Daisy Marsh Reek Fund
- Frank and Delores Valenta Fund

## **OPERATING FUNDS:**

*Supports the Community Foundation's long and short term operating costs.*

- Mason County Operating Fund
- Mason County Operating Reserve Fund

## **SCHOLARSHIP FUNDS:**

*Provide financial support for area students as they pursue post-secondary education expenses.*

- George Dila Memorial Scholarship Fund
- Joe Lancour Memorial Scholarship Fund
- Mason-Oceana-Manistee Board of Realtors Scholarship Fund
- Adam Murphy Fund
- Merry E. Petersen Memorial Scholarship Fund
- Rick & Mary Ann Randall Scholarship Fund
- Marlene Schoenberger Scholarship Fund
- Lee Shipman Engineering Scholarship Fund
- Lee Shipman WSCC Scholarship Fund
- Emily & Frank Smiddy Scholarship Fund
- Bethany Lutheran Church Scholarship Fund
- Hamlin Lake Preservation Society Fund

## SCHOLARSHIP FUNDS (CONTINUED):

- Sharon Bradley Johnson & Carl Johnson Scholarship Fund
- Michael & Rebecca Magee Scholarship Fund
- Thomas Thompson Family Scholarship Fund
- West Shore Community College Foundation Scholarship Endowment Fund
- Noble Arent Memorial Scholarship Fund
- Robert J. & Norma E. Bazzett Scholarship Fund
- Drs. Ruth & John Carney & Irene Carney Kendrick Memorial Scholarship Fund
- Richard & Helen Daron Scholarship Fund
- Fabaz Family Scholarship Fund
- Knizacky Family Memorial Scholarship Fund
- Margaret M. Lederle Ludington Area Schools Scholarship Fund
- Everett J. Liebetreu Education Fund
- Ludington Education Association Scholarship Fund
- Ludington High School Class of '59 Scholarship Fund
- Ludington Rotary Scholarship Fund
- Danny McCarty Memorial Scholarship Fund
- Miller Family Scholarship Fund
- Alberta Muzzin Chamber of Commerce Scholarship Fund
- Dr. Charles A. Paukstis Scholarship Fund
- Craig L. Rasmussen Memorial Scholarship Fund
- Virginia Scott Memorial Scholarship Fund

## FUNDS FOR THE COMMUNITY:

*Support the greatest needs and opportunities in our community.*

- Mason County Funds for the Community
- Charles L. (Sandy) Cabe Fund
- Class of 1957 of Ludington High School
- Charles Conrad Fund
- Richard and Helen Daron Fund
- Paul and Cathy Drewry Family Fund
- Isabelle Hasenbank Fund
- Horizon Financial Fund
- Everett J. Liebetreu Fund
- Maclean Family Fund
- Greater Mason County Fund
- Clinton & Lila Coleman and Charles & Margarette Reader Fund
- Shirley M. Smedley Memorial Fund
- Rick & Sharon Templar Fund
- Karen M. Worten Fund







## Community Foundation for Mason County

119 S. Rath Ave.  
Ludington, MI 49431

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### Community Foundation for Mason County 2022 Advisory Board

- |                            |                       |                    |
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| • Kristen Biggs            | • Lynda Matson        | • Kristi Zimmerman |
| • James Jensen             | • Dr. Jennifer Miller |                    |