



BUILDING A STRONGER COMMUNITY TOGETHER
THE CAMPAIGN *for* **MASON COUNTY**

Our vision, as the Community Foundation *for* Mason County, is to be a leader in community philanthropy so that we may build a vibrant community with great opportunities for all.



For nearly 30,000 people, Mason County is HOME.

Mason County is more than a few summer months of warmth and sunshine, memories made jumping over waves, and fireworks on the 4th of July. It is a community full of history and heritage. It is a community where people walk to the park after enjoying a scoop of ice cream in Ludington's thriving downtown. It is a place that celebrates the visual and performing arts, miles of trails for outdoor recreation, breweries, museums, and more. It is a community with tremendous medical facilities and health care, as well as public and private education offerings known for their small and personable class sizes and high education standards.

Mason County shines as it draws tourists and year-round residents alike, yet there are vital unmet community needs that could strengthen and propel our community to be even more.

The process of becoming even more begins when we realize that Mason County is largely a place with a waning middle class. With a total of **12,186** households, **14%** of our community lives in poverty – and a staggering **40%** struggles to meet basic needs. Circumstances aside, each member of our community contributes to the richness and beauty of Mason County. At the Community Foundation *for* Mason County, we appreciate every community member's efforts to educate our children, keep our families healthy, and fuel our economy. Everyone makes our quality of life better, and everyone counts.

Funds for the Community: Increasing Grantmaking Capacity



Our Challenge

Increasing Grantmaking Capacity

While Mason County is an extraordinary place to live for many, in some areas, our community falls short. By identifying the gaps and doing our best to fill them, the Community Foundation for Mason County works to address our community's most pressing challenges.

The \$5M Campaign for Mason County is our chance to fill those gaps. With your support we can help the people who live and work right here in Mason County find the resources they need to be successful. More than that, we can offer hope that our community is an extraordinary one for all of us.

We have made great strides, but to move the needle any further, we lack the necessary, flexible Community Funds to meet the annual demands placed upon our grantmaking program. This results in deserving requests from nonprofit partners and community organizations going unmet each year.

The Community Foundation has roughly \$124,000 a year in unrestricted flexible funding to grant to deserving nonprofit partners to assist with our community's greatest needs.

The Community Foundation draws a 4% distribution from our endowment annually. The current Funds for the Community endowment is \$3.2 million.

The desired Funds for the Community endowment is \$8.2 million. This increase would almost triple the grantmaking capacity of the Community Foundation.

\$124,000/year
Current

\$324,000/year
Goal



Our **Strategic Goals**

Educational Advancement



Advance Educational Attainment

- Increase post-secondary access and program completion (college, trades, apprenticeships)

Community Development



Increase Recreation and Quality of Life Opportunities

- Support the creation of community gathering spaces, arts, culture, parks, and beautification efforts

Economic Development



Improve Workforce Supports

- Facilitate access to affordable childcare, housing, transportation, and broadband

Our Opportunities

Imagine if we could add \$200,000 to our community grant budget, addressing the core issues impacting our community, our quality of life – and available opportunities – would brighten.

Building Funds for the Community now will make our community stronger for the future.

To increase our grantmaking abilities, we must increase our Funds for the Community from \$3.2 million to \$8.2 million. This will allow us to grant over \$300,000 each year, increasing our grantmaking efforts forever and give our community the boost it needs to make progress on real and pervasive issues. Our grantmaking committee will then be charged with using our identified strategic goals as a guide to focus on addressing the root cause of issues related to increasing educational equity, workforce supports, and innovative community and economic development.

With the ability to grant over \$200,000 more each year toward our strategic goals, our grant program will:

- Focus on projects that pilot, accelerate, scale, or fill significant gaps.
- **Build capacity** and support the incredible work of our nonprofits already in these spaces.
- Respond throughout the year to evolving community needs.
- Support **multi-year grants** to promote effective planning and programming.
- Leverage greater funds from outside our community through matching grants.

Growing our Funds for the Community through this campaign would help create a community where:

- All students would have the opportunity and support to continue their **post-secondary education.**
- Residents would have the resources to maintain steady employment, **prosper economically,** and enjoy the recreational offerings that make Mason County extraordinary.



This is **Our Moment**

By seizing the moment, donors eager to make an impact today can improve the quality of life and the quality of opportunities afforded to residents tomorrow.

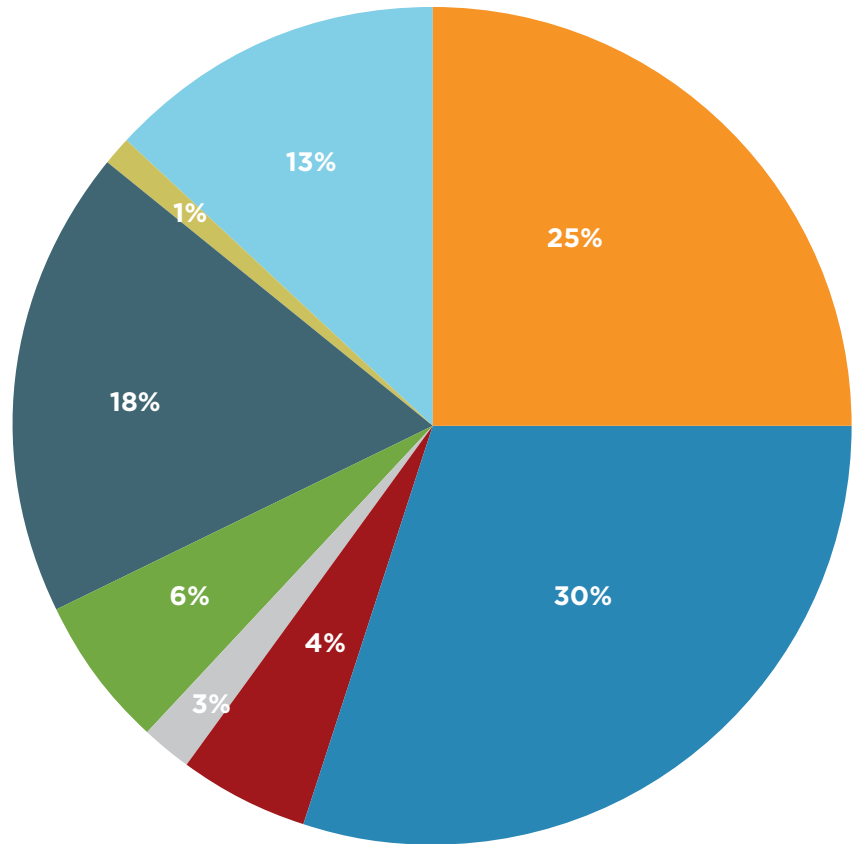
We deliver on our mission every day, enhancing the community that we all live in and love. In this moment, you can help us connect people with essential resources and advance our community's vision for the future.

By investing in the Campaign *for* Mason County, you will provide us with the financial resources to advocate, lead, and address emerging needs and opportunities community-wide.



Current Asset Breakdown

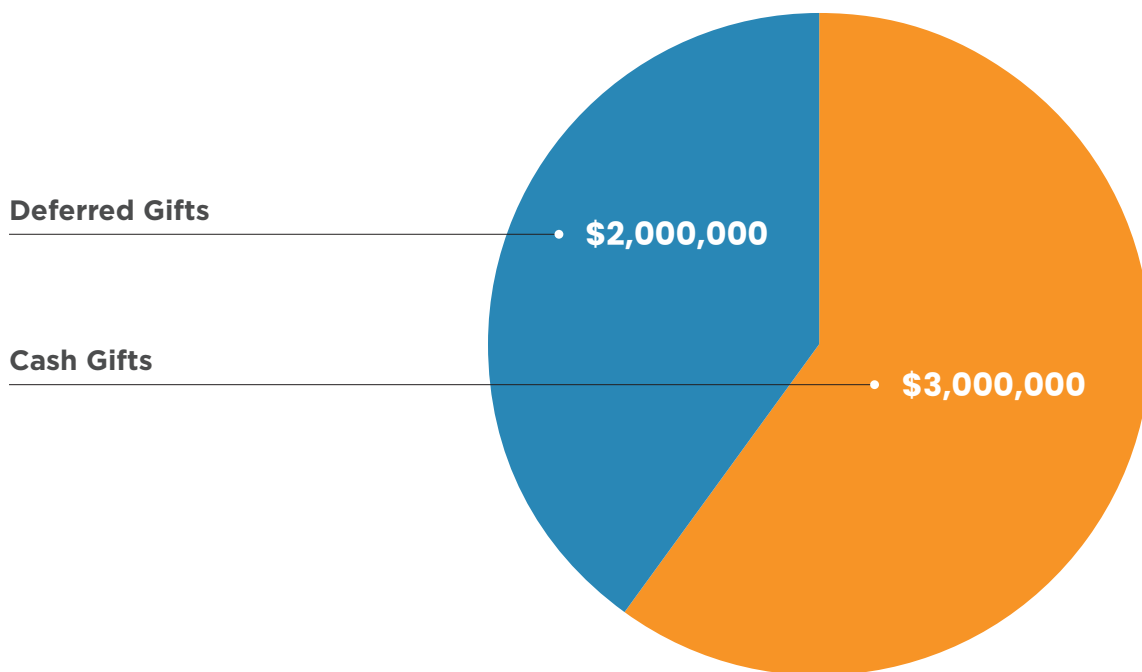
Donor Advised	\$6.5M
Agency Endowment	\$7.1M
Community Project	\$1.2M
Designated	\$0.9M
Field of Interest	\$1.5M
Scholarship	\$4.3M
Build a Fund, Annuities, Operating	\$0.3M
Funds for the Community	\$3.2M
TOTAL	\$25.1M



“The Community Foundation is connected to the community and the community’s needs, it is the perfect giving vehicle as it assesses and prioritizes the community’s greatest needs continuously. The Community Foundation serves as a connector of people, passion, ideas, and money. It serves a critical role in our community.”

- John Wilson (donor, Pennies from Heaven, Chair/Founder, business and community leader)

Campaign Funding



2023

Planning and Quiet Phase

2024

Quiet Phase

2025

Public Phase and
Celebration

“The Community Foundation does so much for our entire community. It is the trusted organization that supports all of Mason County’s initiatives, and I take pride in working alongside such an incredibly all-encompassing group that steps up to promote and create awareness for all projects, small or large.”

- Julie Van Dyke (local business owner, former Community Foundation board chair, and former KickStart to Career Coordinator)



Ways to Give



CASH

Make an outright gift or pledge your support. Pledges can extend three years and donations may be eligible for tax deductions.



GIFTS OF STOCK

Stock, or other appreciated assets, can be donated and may qualify for a charitable tax deduction. If the stock has appreciated in value, you may avoid paying capital gains upon transferring it to the Community Foundation.



DEFERRED GIFTS

You can create a meaningful legacy through a planned gift. Planned giving options include bequests, charitable gift annuities, charitable remainder trusts, life insurance policies, retirement plans, or other arrangements.



QUALIFIED CHARITABLE DISTRIBUTION

Individuals who are 70 1/2 years old, or older, can donate a maximum of \$100,000 to the Community Foundation directly from a taxable IRA instead of taking their required minimum distributions.



DONOR ADVISED FUND

You can give a gift through your Donor Advised Fund by contacting Andrea Large to recommend a grant.

CONTACT

Community Foundation *for* Mason County
Andrea Large, Executive Director

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Named Fund Opportunities

Funds for the Community are available to those who wish to create a fund in their name. These Funds provide unrestricted flexible dollars to make a difference every year, forever.

Our Legacy, **Our Promise**

Over three decades ago, local visionary leaders, Charles Conrad, Milan “Bud” Reed, and Don Birtwistle, were inspired by the success of the community foundations in Holland and Muskegon. Confident that they could create a community foundation of the same caliber in Mason County, the trio established an everlasting resource for generations to come. As a proud affiliate of the Community Foundation for Muskegon County, we reflect the character of the region we serve.

Since the beginning, the Community Foundation *for* Mason County has provided the permanent resources, advocacy, and leadership to create positive change at home. As you look around our community, you would struggle to see an area untouched by our support.

Our legacy of responsible stewardship continues to earn the trust of individuals, families, and businesses working to create the greatest possible good within our community. We manage \$25 million in assets that create a far-reaching impact on the people, programs, and places in our community. Every gift is cherished and honors a donor’s intent.

Our legacy, paired with your support, will help us build a stronger community together.

This year marks our 35th anniversary. Thanks to the generosity that lives here, our assets have reached \$25.1 million.

“Our Community Foundation *for* Mason County has become our most dynamic resource. The Foundation makes dreams come true by supporting projects that are built to last, helping our youth further their education, and creating the place where families can create legacies that live forever. Thank you for making our county an even better place to live and work!”

- Budde Reed (founding foundation family, donor, and community leader)







Photo courtesy of ToddandBradReed.com

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