



Thriving Together

now and forever

2023–2024 Annual Report

**Community
Foundation**

FOR SOUTHEAST MICHIGAN



Thriving Together

now and forever

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Thank you to all the Community Foundation staff and community partners who contributed to this annual report!

MESSAGE FROM OUR CHAIR AND PRESIDENT

Leadership: Past, Present & Future

During times of change and uncertainty, it's comforting to know there are some things you can depend on.

Since 1984, the Community Foundation for Southeast Michigan has been a trusted source of support for our region. We've granted \$1.4 billion via 91,000 grants to thousands of nonprofits working to benefit the well-being of communities in the seven counties we serve. Thanks to our funders and generous donors, we've also grown our asset pool to \$1.3 billion, enabling us to continue this work in perpetuity.

Our 2023 financial year continued our history as a vital community partner. We distributed \$120 million via 5,000 grants to support economic development, health and human services, children and youth, and much more. In this annual report, you'll read stories that bring this impact to life and

demonstrate how we've invested in the values outlined in our new strategic vision, "Thriving Together."

We developed this strategic vision to build on the legacy of the Community Foundation's first president — Mariam Noland, who led the organization for 36 years — and to meet evolving community needs, align with advances in technology, and integrate diversity, equity and inclusion into all of our work.

Charting this vital road map for our future and creating a rigorous succession plan for our staff and board was a top priority when Richard (Ric) DeVore took over as a transformational president in 2022. We are confident that when he retires in 2025 to enjoy more time with his wife and family after a vaunted career in banking and philanthropy, the Community Foundation will be in good hands because of the plans he has put in place.



Nicole Sherard-Freeman

We are delighted to share that Chief Operating Officer Nicole Sherard-Freeman, who has been a key partner in creating "Thriving Together," will become the Community Foundation's third president, beginning in January. She brings an extensive business, government and nonprofit background to the role. She also has deep roots in the community and a commitment to the well-being of the people we serve. We are thrilled that someone with her expertise, lived experience and expansive network will lead the Community Foundation into the future.

We're also pleased that Ric will stay on in an advisory role, beginning in January, to provide continuity during the leadership transition and to steward the Detroit riverfront fund. The \$35 million pooled fund was created in 2024 after a fiscal crisis at the Detroit Riverfront Conservancy. It is because of the trust the Community Foundation has earned and the relationships we've built over the past 40 years that we're in a position to ensure the work on this jewel of southeast Michigan is completed.

We're grateful that Chair David Provost — a veteran business and civic leader who has served on the Community Foundation board since 2011 and worked closely with Mariam, Ric and Nicole — will continue to serve as chair, acting as a bridge between our past, present and future.

As we celebrate our 40th anniversary this year and embark on our 10-year strategic vision, with capable leadership in place and in collaboration with thousands of engaged community partners, our request to you is twofold.

First, we invite you to renew and revitalize your connection with the Community Foundation and our work. As you read about our vision, mission and values in this annual report, please consider how they connect with your own.

We're also asking you to support our Now and Forever Fund, an essential resource for powering the day-to-day operations that make our work possible. By supporting this fund, you enable us to continue making a meaningful impact, while maintaining the flexibility to meet challenges head-on, as our community counts on us to do. Please reach out to our Donor Services team at donorservices@cfsem.org or call 313-961-6675 to make a donation.

Thank you, again, for your unwavering partnership and commitment to ensuring southeast Michigan is a place where everyone thrives, now and forever.



David T. Provost
David T. Provost
Chair



Richard L. DeVore
Richard L. DeVore
President

“We invite you to renew and revitalize your connection with the Community Foundation and our work. As you read about our vision, mission and values in this annual report, please consider how they connect with your own.”

HISTORY HIGHLIGHTS

Celebrating 40 Years of Impact

1984

Community Foundation established

The Community Foundation for Southeast Michigan launches after two years of community conversation and planning, spearheaded by businessman and civic leader Joseph L. Hudson, Jr.

1994

Diversity, Equity, Inclusion

The HOPE Fund becomes the first partnership of its kind in Michigan between the LGBTQ+ community and a community foundation. The fund strengthens organizations and projects that meet the evolving, essential needs of southeast Michigan's LGBTQ+ community.

2007

Innovation

The New Economy Initiative launches, providing direct assistance to small businesses. The initiative continues to grow an inclusive culture of entrepreneurship in southeast Michigan that benefits all residents and strengthens the regional economy.

2019

Operational excellence

The Community Foundation surpasses \$1 billion in assets and \$1 billion in grants, while pursuing continuous business practices that have resulted in clean audits for its entire history.



1991

Leading change

The Van Dusen Endowment Challenge launches, in partnership with The Kresge Foundation, raising nearly \$50 million in new endowments to support regional nonprofits in perpetuity.

2006

Trust and integrity

The Community Foundation earns Community Foundations National Standards accreditation, the nation's highest standard for philanthropic excellence. It has held the distinction ever since.

2013

Collaboration

The Community Foundation convenes regional and national foundation leaders to help create the "Grand Bargain," allowing Detroit retirees to retain pensions and health care benefits amidst the largest city bankruptcy filing in U.S. history.

2024

New strategic vision launches

The Community Foundation embarks on a 10-year strategic vision called "Thriving Together." The framework was created with input from our Board, donors, funders, professional advisors, community partners and staff.



Community Foundation

FOR SOUTHEAST MICHIGAN

Thriving Together: 2024–2034

The vision, mission and values outlined in our new strategic vision will guide our actions as the Community Foundation continues to serve southeast Michigan during the next decade.

Vision

Southeast Michigan is a place where everyone thrives.

Mission

We build the resources, relationships and expertise required to expand equitable access to opportunities. Our mission is to make southeast Michigan a desirable place to live, work and play for all residents, today and tomorrow.

Investing in our values

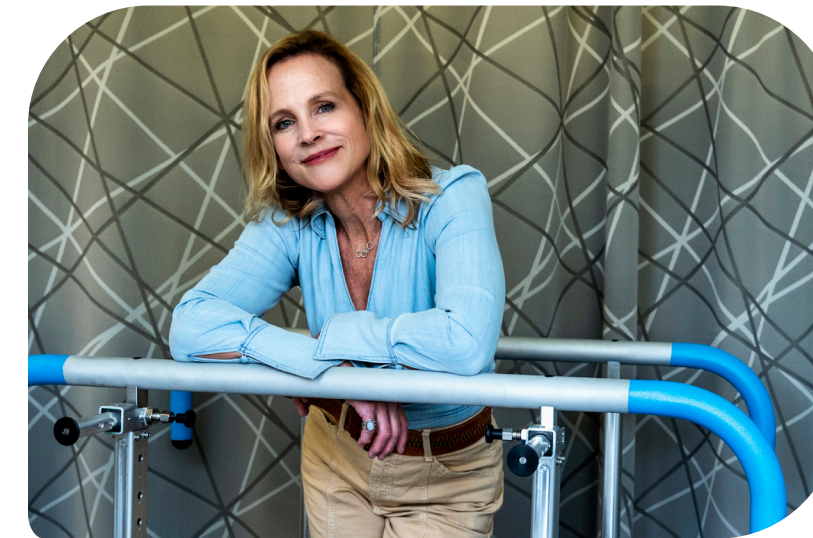
In this annual report, you'll read stories that demonstrate how the Community Foundation invests in our values.

- **Innovation:** We nurture cutting-edge ideas and respond nimbly to evolving community needs. We're a trusted partner for problem-solving in our region. We approach our work with creativity.
- **Leading change:** We lead with humility, empathy, curiosity and courage. We prioritize the well-being of our community. We identify and invest in regional solutions. We challenge the status quo.
- **Operational excellence:** We use data to guide our actions and measure our impact. We pursue continuous improvement and sustainable business practices. We grow endowments to create community capital today and for future generations.
- **Diversity, Equity, Inclusion:** We view southeast Michigan's diversity as a strength. We break down systemic barriers to expand equitable access to opportunities for all people. We welcome everyone to be their true self, so they can be their best self.
- **Collaboration:** We convene funders, foundations and nonprofit leaders to make measurable change around shared goals. We listen to and learn from our community.
- **Trust and integrity:** We are a responsible steward of our community's philanthropic dollars. We are transparent and share progress toward our commitments. We honor donors' intentions. We do what we say we'll do.

“The New Economy Initiative’s funding of (business incubator) Centrepolis helped us give back to the community.”

— Gina Adams, Wareologie, a grantee partner of the Centrepolis Accelerator, supported by the New Economy Initiative at the Community Foundation for Southeast Michigan

Innovation



Putting imagination to work

Ideas are crackling to life inside the Centrepolis Accelerator in Southfield.

On a recent day at the business incubator, a 3D printer zipped busily back and forth in the lab, while a team utilizing private office space collaborated intently around a computer screen. On a different day, a visitor might observe entrepreneurs pitching their ideas to a panel of judges, “Shark Tank” style, to win funding.

Centrepolis, which is a grantee partner of the New Economy Initiative (NEI) managed by the Community Foundation for Southeast Michigan, supports small manufacturers and hardware entrepreneurs. Its facility on Lawrence Technological University’s campus offers access to a state-of-the-art design and prototyping lab, conference rooms and office space, as well as expert guidance to help entrepreneurs get their ideas off the ground.

NEI recently invested \$200,000 in the Micro Makers Evolution Lab at Centrepolis. The lab supports small manufacturers in Wayne County and Southfield — like the medical equipment company Wareologie — that are

managed by women, people of color, veterans or people with disabilities.

“As an entrepreneur marketing a first-to-market product, it’s incredibly challenging,” says Gina Adams, Wareologie’s founder and CEO. “Centrepolis is a place where we can collaborate, commiserate and celebrate.”

Transforming ideas into reality

In response to calls from skilled nursing clinicians during the COVID-19 pandemic, Adams and her team invented the world’s first portable parallel bars on wheels. The innovative piece of medical equipment enabled patients, who often were isolated and immobile, to receive rehabilitation services at home or in their hospital room.

With support from NEI and Centrepolis, Adams was able to quickly bring the bars to market.

Since then, the Michigan-made product has caught on in oncology departments and other medical settings, where their portability gives clinicians the option to safely treat patients in the privacy of their room.

Wareologie has filled orders for the bars from Ascension health system, Kaiser Permanente and the Veterans Health Administration, among others.

Supporting small businesses

During 2023, the New Economy Initiative assisted 4,739 companies and made \$5.5 million in grants to 39 grantee partners, including Centrepolis. The investment underscores NEI’s mission to grow an inclusive community of entrepreneurship in southeast Michigan that benefits all residents and strengthens the regional economy.

Adams’ success story is a case in point.

“We’re now supporting ICU and acute care patients, to help them stand for early mobility, which is shortening their length of stay and improving their quality of life,” she says. “The New Economy Initiative’s funding of Centrepolis helped us give back to the community.”

Leading change



To anticipate the growing needs of this aging population, Livingston County Catholic Charities and Catholic Social Services of Washtenaw County, with support from the Community Foundation for Southeast Michigan, have partnered to expand free or low-cost services for older adults.

Safe, independent aging

The Community Foundation recently made a \$75,000 grant from its Community Health Endowment Fund to help the organizations raise awareness among older adults about the resources and services available to help them age safely and independently.

Livingston County Catholic Charities and Catholic Social Services of Washtenaw County will conduct outreach events and, once connected with seniors, will work to identify their needs and connect them with the appropriate supports.

For example, a representative might help older adults find resources for counseling, homebound meals, housing repairs, legal services, long-term care, prescription assistance or transportation. Or, they might help seniors find assistance to navigate Social Security, Medicare, Medicaid, Veterans Administration benefits, tax forms, or information about fraud and abuse.

A go-to resource for older adults

“Having a go-to resource like Livingston County Catholic Charities would have been so impactful in my grandma’s life,” Skomial says. “I appreciate and adore that we can be that person for so many seniors in our community. This past year, the program served almost 1,200 older adults.

“The Community Foundation for Southeast Michigan has profoundly impacted our agency over the years, particularly in enhancing our senior services,” Skomial says. “With their support, Livingston County Catholic Charities has been able to identify and address emerging needs.”

Preparing to support our aging population

When thank-you letters from older adults arrive at Livingston County Catholic Charities, Development and Marketing Director Ryan Skomial recalls her own grandmother.

“She lived in Massachusetts and we lived in Michigan. She was disabled and had very limited resources,” Skomial says. “Albeit, she took a bus to see me. She took trains to see me. She didn’t have much money, but she spent what she had to come see me. She was pretty remarkable.”

Skomial’s grandma represents the growing number of adults age 65 or older in the United States. In 2020, the senior population reached more than 55.6 million, or 17 percent of the total population, and it’s projected to reach 80.8 million by 2040, according to the U.S. Administration for Community Living.

Many older adults face challenges including social isolation, poverty, chronic health conditions, and lack of access to transportation. Additionally, the costs of geriatric care services, in-home care and assisted living are cost-prohibitive for many seniors.

“The Community Foundation for Southeast Michigan has profoundly impacted our agency over the years, particularly in enhancing our senior services. With their support, Livingston County Catholic Charities has been able to identify and address emerging needs.”

— Ryan Skomial, Livingston County Catholic Charities, a Community Foundation grantee partner

\$34M+

funds held as agency endowments

\$10K

minimum to establish an agency endowment fund

~250

agency endowment funds

Operational excellence



Agency endowment is 'the ultimate gift'

Alternatives For Girls — a Community Foundation for Southeast Michigan endowed fund partner — empowers homeless and at-risk young women by providing critical interventions including youth programs, an emergency shelter, housing assistance, support for survivors of human trafficking and domestic violence, workforce development and child care.

“Nobody chooses to grow up in a family with instability or violence,” says Cecile Aitchison, chief development officer at the Detroit-based nonprofit. “We’re supporting the young women we serve to see themselves outside their immediate circumstances. We want them to feel valued enough that they start thinking about their future in brighter terms.”

In 2005, Alternatives For Girls established its first agency endowment fund at the Community Foundation. The nonprofit’s goal was to create a sustainable funding source so it could continue to help young women break the cycle of poverty and become economically independent.

Alternatives For Girls is one of nearly 250 nonprofits throughout southeast Michigan that benefit from agency endowment funds at the Community Foundation.

What is agency endowment?

Agency endowment works like this: A nonprofit makes an initial financial contribution to establish a fund, and then the Community Foundation nurtures the investment over time. A portion of the fund is made available annually to the nonprofit, and the remaining assets are reinvested for growth in perpetuity.

The Community Foundation offers marketing support and handles all of the agency endowment fund’s administration, including gift processing, audit letters and investment management.

This frees up the nonprofit to focus on its work in the community, with the peace of mind that comes from knowing it will have funds to depend on in the future.

Endowment in action at Alternatives For Girls

“Young women and girls are some of the most vulnerable populations in our community,” Aitchison says. “The systemic issues they may face around the safety of their communities, the stability of their families, the support for their educational achievement, are exacerbated if basic needs such as food, transportation and health care are also a challenge.”

As long as these challenges exist, there will be a need for the services Alternatives For Girls provides. Aitchison says having agency endowment allows the organization to plan to meet this need and to have strategic conversations with donors about their legacy giving.

“What it signals is that Alternatives For Girls is a mature organization with future funding stability front of mind, and we’re partnered with another mature organization that will manage our investments,” she says. “Everybody knows the Community Foundation. It’s a very trusted presence in the community.”

“This work has nothing to do with politics. It has to do with being a good neighbor, a good human being, and helping those in your community.”

— Elizabeth Orozco-Vasquez, CEO of Freedom House Detroit,
a Community Foundation grantee partner

Diversity, Equity, Inclusion



A safe space to seek opportunity

“When I was growing up, the treat was going to McDonald’s on the weekend. It was not until I was an adult that I realized my mom never got anything,” says Elizabeth Orozco-Vasquez, who immigrated to the United States as a child with her mother. “It was just the fries or chicken nuggets that I would leave behind that she was having for the day.”

Today, her mother’s sacrifices and her own experiences as a first-generation immigrant guide Orozco-Vasquez’s work as CEO of Freedom House Detroit, a grantee partner of the Community Foundation for Southeast Michigan. The southwest Detroit-based nonprofit supports individuals and families seeking humanitarian protection or asylum.

Honoring Freedom House Detroit

The Community Foundation recently honored Freedom House Detroit with its 2024 Richard F. Huegli Award for Program Excellence, which recognizes nonprofits that have high standards in human services programming and a belief in human potential.

The Community Foundation has a long history of supporting human services organizations like Freedom House Detroit, which has received grants related to its LGBTQ+ community building, general operations and workforce readiness programming.

“Freedom House has been a vital partner, helping us grow our understanding of and investment in immigrant- and refugee-serving organizations,” says Surabhi Pandit, the Community Foundation’s director of Diversity, Equity and Inclusion & Community Engagement. “The gap in service provision for these populations is one that groups like Freedom House are working hard to close, all while building community awareness and cohesiveness in our region.”

Supporting thriving communities

Freedom House Detroit’s clients, many of whom were tortured in their countries of origin, don’t have access to government benefits or employment opportunities in the United States. The nonprofit offers them support as they go through the complicated, costly, often lonely process of applying for protection here or in Canada. This includes providing access to legal counsel, employment services, medical and mental health care, a safe home, food, clothing and internet access for up to two years.

Orozco-Vasquez says almost 100% of graduates from Freedom House Detroit’s programs become independent. This allows them to help build community, fill gaps in the labor force, and even launch businesses that employ other people in our region, she says.

“When I see people at Freedom House, they remind me of my own family. I wish we would have had that kind of support,” Orozco-Vasquez says. “This work has nothing to do with politics. It all has to do with being a good neighbor, a good human being, and helping those in your community. Helping your community thrive is really important.”

“Michigan Justice Fund convenings have always had this genuinely collaborative feel to them. It's not just people who are doing the work; it's people who are funding the work; it's people who believe in the work.”

— Adam Grant, A Brighter Way, a grantee partner of the Michigan Justice Fund at the Community Foundation for Southeast Michigan

Collaboration



Making reform, one connection at a time

Neon-colored sticky notes splash across the windows and hand-scrawled ideas fill nearby whiteboards in a room where Michigan criminal legal reform advocates have gathered to brainstorm.

“Everybody has a dog in the fight. So, we're all trying to build something together” says Adam Grant, executive director of A Brighter Way, a grantee partner of the Michigan Justice Fund at the Community Foundation for Southeast Michigan. “When we have ideas, we put them out there.”

The convening is an example of how the Michigan Justice Fund creates welcoming spaces where stakeholders can share their experiences and ideas in order to build an effective criminal legal reform movement.

Michigan Justice Fund gets results

Since it was established in 2020, the Michigan Justice Fund has made 221 grants, deployed nearly \$19 million, and touched all 83 counties in Michigan. Last year alone, the fund made 58 grants totaling nearly \$2.7 million.

The criminal legal reform movement it supports is yielding tangible, positive results.

Prison population rates are down 4% since 2020, according to research the Michigan Justice Fund commissioned, and the number of individuals under Michigan Department of Corrections parole supervision fell by nearly 30% between 2020 and 2022. The declines coincided with a decrease in violent crime, suggesting reduced incarceration and safer communities can go hand-in-hand.

A key strategy the Michigan Justice Fund uses to advance this work is bringing diverse audiences together to listen, learn and engage.

“We serve as a funder, convenor and community partner, working collaboratively with a cross section of stakeholders to advance reform work across the state,” Michigan Justice Fund Director Ashley Carter says. “We consistently work to create generative spaces where advocates, other funders, and relevant changemakers can gather, ideate and strategize about solutions.”

Building trust-based relationships

Returning citizens often face challenges such as lack of access to transportation, housing, child care, and employment, but Adam Grant says trust is also a barrier.

Grant leads the Ypsilanti-based nonprofit A Brighter Way, which helps formerly incarcerated individuals like himself return to the community and achieve purpose-filled lives, with support from peers and access to trauma-informed services.

He says the Michigan Justice Fund's carefully curated events play a vital role in building the trust-based relationships required to advance criminal legal reform. Each convening is designed to be emotionally engaging and interactive — a breath of fresh air for participants.

“Michigan Justice Fund convenings have always had this genuinely collaborative feel to them,” he says. “It's not just people who are doing the work; it's people who are funding the work; it's people who believe in the work.”

“Brad (Simmons) certainly made a difference in the region where he worked and lived. Through his fund at the Community Foundation, we are privileged to continue making grants in his name, in perpetuity, to support nonprofits throughout southeast Michigan.”

— Community Foundation Vice President and General Counsel Laura Brownfield

Trust and integrity



A donor's story of lasting generosity

Longtime Ford Motor Co. executive Brad Simmons was a beloved figure in southeast Michigan. He was known as a kind, thoughtful, generous man of deep faith — a servant leader who prioritized the well-being of people in our region.

Simmons inspired others by giving freely of his talent, time and treasure to support the causes he cared about, including his alma mater, Brother Rice High School, and HAVEN, a nonprofit that works to prevent domestic violence and sexual assault and to support survivors. He also supported the National Eagle Scout Association, which established the Brad Simmons Eagle of Extraordinary Service Scout Award in his honor.

Simmons, who passed away in September, even planned his giving to ensure nonprofits throughout southeast Michigan would continue to receive his support in perpetuity.

A longtime Community Foundation supporter



Brad Simmons

In 1996, Simmons began making annual donations to the Community Foundation's Southeast Michigan Forever Fund, which enables us to respond to emerging needs in the region. Then, in 2007, he established a donor-advised fund at the Community Foundation that allowed him to take an active role in his philanthropic giving.

Throughout his lifetime, Simmons worked with his estate planning attorney to ensure that his charitable giving would continue after his passing. He named the Community Foundation as a charitable beneficiary of two trusts, creating lasting impact and a legacy that reflects his values.

Trusted philanthropic partners who care

Community Foundation Vice President and General Counsel Laura Brownfield, who partnered with Simmons and his legal advisor to administer Simmons' bequests, says it was a privilege to work with Simmons during his lifetime and to honor him on his passing by carrying out his donor intent.

“I had the pleasure to call Brad a friend for over 40 years and to work with him professionally,” Brownfield says. “When I joined the Community Foundation, he reached out to inform me he had previously established a fund with us, sharing this sentiment via email: ‘I have always been an admirer of the unique and important services the Community Foundation (all of YOU!) provide to our community.’”

“Brad certainly made a difference in the region where he worked and lived,” she says. “Through his fund at the Community Foundation, we are privileged to continue making grants in his name, in perpetuity, to support nonprofits throughout southeast Michigan.”

Q&A: Trustee Maria Thompson says innovation, DEI help our region thrive



Maria Thompson is an optimistic leader who brings the perspectives of both a scrappy startup entrepreneur and an alternative energy innovator to the Community Foundation for Southeast Michigan's Board of Trustees.

Thompson and her husband, Dr. Levi Thompson, along with Dr. Mike Wixom, co-founded the alternative energy company T/J Technologies in 1991. They grew and developed the business before selling it in 2006 to A123 Systems, a leading global supplier of high-power, lithium-ion batteries used in vehicle manufacturing. In 2008, the Washington, D.C.-based Minority Enterprise Executive Council named Thompson as one of its 25 Powerful Minority Women in Business.

Today, the semi-retired CEO is a venture partner at Arsenal, a growth equity firm focused on the intersection of the government, large corporations and emerging technology companies. She also serves on the University of Michigan's Ross School of Business Zell Lurie Institute Advisory Board and the Reko International Group Board of Directors, among others.

Inspired by the Community Foundation's commitment to innovation, Thompson joined its Board of Trustees in 2020 and has since applied her extensive experience as a member of its Program and Distribution Committee. She also has donated to support the Community Foundation's administrative fund, as well as its Mariam C. Noland Public Spaces Fund.

"Philanthropy just makes the world a better place," she says. "Providing everyone an opportunity to get a leg up and to be successful pays dividends for the entire community."

What are you working on that has you excited?

One thing is voting. Getting people to vote is very, very important. I've been working on postcards, and some of my other organizations, such as the Links and Delta Sigma Theta, are really committed to increasing voter turnout. I can't think of anything more important in the

immediate future to be working on. I'm glad the Community Foundation is also involved with that.

In the past year, I've also joined the advisory committee of the New Economy Initiative, which the Community Foundation manages. Helping to encourage people to start and grow their own businesses is a passion of mine.

Which one of the Community Foundation's values resonates most with you?

There are two of them, actually. One is Innovation and the other is Diversity, Equity, Inclusion.

My training as an industrial designer was basically in innovation. Having an innovative, diverse staff was our superpower in growing our business, coming up with new battery materials for an industry that was just emerging. The Community Foundation also uses innovation to creatively address community problems and create opportunities to improve life in southeast Michigan.

The other is DEI, because what interests me as a Community Foundation trustee, besides entrepreneurship and the New Economy Initiative, is helping underrepresented minorities and people from less-privileged backgrounds. Southeast Michigan will be a better place if everybody has a voice and an equal opportunity to be successful.



Community Foundation for Southeast Michigan Trustee Maria Thompson recently joined the advisory committee of the New Economy Initiative. The initiative, which the Community Foundation manages, helps people like Michigan Farm to Freezer co-founders Mark Coe, left, and Brandon Seng start and grow businesses.

"Philanthropy just makes the world a better place. Providing everyone an opportunity to get a leg up and to be successful pays dividends for the entire community."

— Community Foundation Trustee Maria Thompson

What are your hopes for the Community Foundation and our region?

Southeast Michigan, because of the auto industry, has an opportunity to be the epicenter of advanced mobility vehicles and alternative energy opportunities.

We have some of the greatest research and development institutions.

I hope to see more of an emphasis on creating entry-level training and apprentice programs so that young people have an easier time landing their first job on their

career path. That will encourage them to stay in Michigan after graduation.

I appreciate that the Community Foundation is also supporting parks and greenways to make southeast Michigan an environment where people want to live, work and play.

2023 initiatives and targeted funds

Active Community Foundation for Southeast Michigan initiatives during 2023 included:

Afghan Resettlement Fund

This fund supports urgent human services/basic needs and legal services for Afghan refugees arriving in Michigan following the U.S. withdrawal from Afghanistan in 2021. The Council of Michigan Foundations requested this fund be established so foundations from across the state could pool funds to support this population.

Black-Led Mental Health Partnership

This collaborative funds partnerships between Black-led, community-based organizations and trusted behavioral care providers. The goal is to enable organizations to connect their clients to quality Black-led mental health services. This pilot program was launched because racial and ethnic minority groups are less likely to have access to mental health services, less likely to use community mental health services, more likely to use inpatient hospitalization and emergency rooms, and more likely to receive lower-quality care. A collaborative of Michigan-based foundations supports this work.

Community Policing Innovations Initiative

The Community Policing Innovations Initiative provides guidance and support for local community leaders and organizations, in partnership with local law enforcement, to develop community-driven, substantive, and pragmatic changes in how policing and public safety services are provided. A group of local corporate and private foundations supports this work.

Detroit Journalism Engagement Fund

The Detroit Journalism Engagement Fund was created in 2017 by the Ford Foundation, the John S. and James L. Knight Foundation, and the Community Foundation to increase the quality, outcomes, and reach of journalism in the region, with an emphasis on engagement, innovation, and the equitable recovery of Detroit.

Detroit Regional Workforce Partnership

The Detroit Regional Workforce Partnership is a business-led workforce development intermediary focused on bringing the employer community together across the region to solve for shared talent challenges. This model not only ensures that local businesses have the best talent to grow, but also that residents of our region have access to career opportunities and supports that will allow them to thrive.

Great Lakes Way®

The Great Lakes Way aims to create an interconnected set of 156 miles of blueways and 143 miles of greenways, stretching from southern Lake Huron to western Lake Erie. The trail will provide southeast Michigan residents and visitors with access to world-class freshwater, wildlife, recreation and heritage. A group of local foundations supports this effort.

Michigan Justice Fund

The Michigan Justice Fund is a collaborative philanthropic strategy designed to create the type of thriving, enabling environment in Michigan that is necessary to advance justice reform initiatives. A group of local and national foundations supports this effort.

Michigan Opioid Partnership

The Michigan Opioid Partnership is a public-private collaborative including the State of Michigan and key health-focused philanthropic organizations that share the goal of decreasing Michigan's high rate of opioid overdoses and deaths.

New Economy Initiative

The New Economy Initiative works to diversify the regional economy of southeast Michigan and stimulate entrepreneurial development.

Oral Health Equity Initiative

The Oral Health Equity Initiative is comprised of funders dedicated to reducing racial disparities, increasing access to quality oral health care, and eliminating barriers to workforce opportunities in dental fields.

Pontiac Funders Collaborative

The Pontiac Funders Collaborative supports leaders in Pontiac who are working to identify citywide goals, and provides funding to build capacity that enables local leaders and organizations to achieve those goals. It is comprised of local foundations.

Project Play

This initiative — supported by the Ralph C. Wilson, Jr. Foundation — seeks community and stakeholder input to collaboratively build local solutions that ensure all children can be active in sports.

Southeast Michigan Immigrant and Refugee Funder Collaborative

The Community Foundation, in partnership with other local foundations, created this collaborative to address the needs of immigrants and refugees in our region, including conducting “know your rights” campaigns, providing direct human services and referrals, serving as a hub for community activities, providing direct legal services and more.

Targeted, permanently endowed grantmaking funds at the Community Foundation during 2023 included:

Detroit Auto Dealers Charitable Foundation Fund

This fund supports nonprofit organizations that improve the lives of children and youth throughout our region.

The HOPE Fund

This fund was created in 1994 to strengthen organizations and projects that support LGBTQ+ individuals and families through targeted grantmaking and technical assistance.

Inclusive Arts Fund

This fund supports small- to mid-size arts and culture nonprofits throughout our seven-county region, building on related efforts to promote inclusion in and expand access to the arts.

Michigan Central/Church Street Fund

The fund supports neighborhood improvement activities in the Detroit communities of Corktown, North Corktown and Hubbard Richard.

The Ralph C. Wilson, Jr. Legacy Funds

These four funds focus on caregiving, design and access, and youth sports throughout the region, as well as the Grosse Pointe communities.

The Ralph C. Wilson, Jr. Trails Maintenance Fund

This fund provides ongoing support for already-developed trails and greenways.

Youth Leadership Fund

Youth Advisory Committee members review grant proposals from organizations that benefit youth in southeast Michigan and make recommendations from this fund.

\$120M

Distributed in grants

\$1.3B

Total assets

\$117M

In new gifts

5,000

Grants made

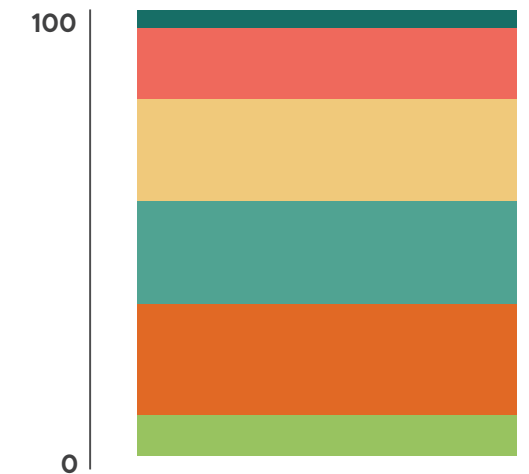
Financials: 2023 financial data



EXPENSE ANALYSIS

- Program activities 95%**
 - Grants
 - Direct charitable activities
 - Program administration
- Supporting activities 5%**
 - General administration
 - Fundraising

TOTAL NET ASSETS: \$1.2 BILLION



- Other 4%**
- Supporting organizations 16%**
- Designated, net of agency endowment 23%**
- Donor advised 23%**
- Field of interest and unrestricted 25%**
- With donor restrictions 9%**

2023 Endowment Investment Highlights

The Community Foundation for Southeast Michigan secures and invests funds to support the region. Its Investment Committee directs and oversees the investment program, emphasizing the larger endowment investment portfolio. Funds invested in the endowment are subject to a spending plan that makes a percentage of the fund's average market value available for grants each year.

Capital markets rebounded significantly over the course of 2023, led by the “Mag 7” (Amazon, Apple, Alphabet, Meta Platforms, Microsoft, Nvidia, Tesla) within the U.S. Large Cap Equity. The Federal Reserve was able to navigate a “no landing” scenario, as inflation began to subside from its 2022 highs, employment remained strong, and interest rate hikes ceased. As of December 31, 2023, the Community Foundation’s endowment portfolio totaled ~\$885.2 after a robust +12.2% return year over year. This marks an increase of ~\$99 million from the prior year’s market value, net of continued financial support to our community, thanks to market appreciation as well as new contributions. While on an absolute basis, these returns are greater than its target annual return, the Community Foundation performed slightly behind its peers (endowments and foundations \$100M-\$1B), with a 63rd percentile ranking over

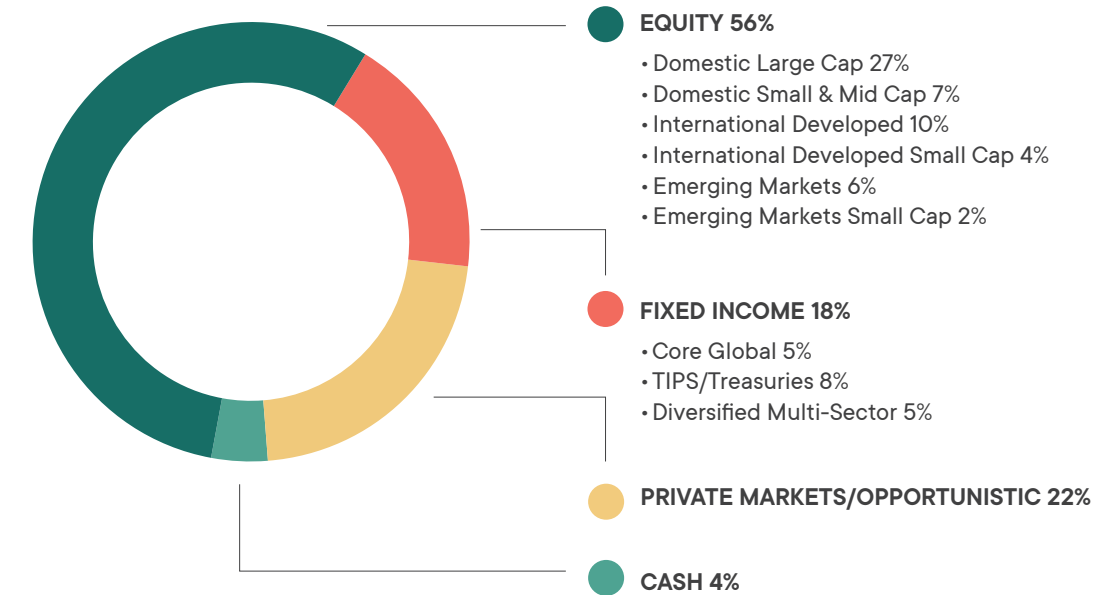
the 12 months. Over longer periods, performance has also exceeded the target return, up 8.3% and 7.3% over the trailing five- and seven-year periods. For context, the Community Foundation seeks to produce returns in the top half of its peer group while taking similar or less risk.

Through the first half of 2024, the S&P 500 is up 15.3%, with non-U.S. equities generating mid- to single-digit returns. While capital markets have performed quite well over the last 18 months, there are geopolitical tensions and economic uncertainty that give investors pause. In these times, adherence to a well-diversified portfolio and long-term investment horizon is paramount, as a multiyear approach to investing helps mitigate short-term volatility. As such, the Investment Committee works closely with its investment consultant, NEPC, to review investment risks and opportunities as they arise. A subcommittee is also engaged, as needed, to continue the momentum between meetings of the full committee.

The Community Foundation recognizes and appreciates the dedication and support of all its volunteer committee members and its consultant.

As of December 31, 2023, the Community Foundation’s endowment portfolio totaled ~\$885.2 after a robust +12.2% return year over year.

TARGET ASSET ALLOCATION



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Wells Fargo Advisors

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Renaissance Venture Capital Fund

Sean K. Werdlow
Senior Managing Director and COO
Siebert Cisneros Shank & Co LLC

INVESTMENT CONSULTANT

NEPC, LLC

Partner
Richard K. Ciccione

Principal, Senior Consultant
Scott B. Harsh

COMBINED STATEMENTS OF FINANCIAL POSITION

<i>As of Dec. 31</i>	2023	2022
ASSETS	TOTAL	TOTAL
Cash and cash equivalents	\$56,467,643	\$10,180,502
Investments	1,108,323,920	1,084,420,596
Contributions receivable	83,371,101	55,271,709
Deferred gifts receivable	2,275,700	2,432,764
Commercial annuities	6,977,788	7,296,798
Accrued investment income	327,996	484,249
Other assets	<u>2,746,574</u>	<u>3,084,125</u>
TOTAL	\$1,260,490,722	\$1,163,170,743
LIABILITIES AND NET ASSETS		
LIABILITIES:		
Grant commitments	\$16,696,330	\$17,821,681
Accounts payable	741,079	535,673
Charitable gift annuities	<u>11,950,853</u>	<u>12,506,949</u>
	29,388,262	30,864,303
Funds held as agency endowments	34,209,959	30,326,731
Total liabilities	<u>63,598,221</u>	<u>61,191,034</u>
NET ASSETS:		
Without donor restrictions	1,085,911,759	1,021,122,738
With donor restrictions	110,980,742	80,856,971
Total net assets	<u>1,196,892,501</u>	<u>1,101,979,709</u>
TOTAL	\$1,260,490,722	\$1,163,170,743

COMBINED STATEMENTS OF ACTIVITIES

<i>For the years ended Dec. 31</i>	2023	2022
REVENUES, GAINS AND OTHER SUPPORT:	TOTAL	TOTAL
Contributions	\$116,628,236	\$67,055,372
Less amounts received from agencies	(1,367,129)	(2,256,966)
Net assets released from restrictions	36,513,465	(36,513,465)
Change in value of deferred gifts receivable	418,653	418,653
Interest and dividends, net	19,419,169	13,419,287
Less net interest on amounts held for agencies	(368,885)	(272,814)
Net unrealized and realized gain (loss) on investments	99,314,688	(144,234,862)
Less (gain) loss on investments held for agencies	(3,342,218)	4,075,119
Remeasurement of charitable gift annuities	(333,195)	(321,971)
Administrative revenue from amounts held for agencies	146,681	138,470
Miscellaneous income	330,316	655,618
Total revenues, gains and other support	\$230,846,316	\$(59,264,324)
GRANTS AND EXPENSES		
Grants	120,033,180	103,493,093
Less amounts granted to agencies	(1,048,323)	(991,207)
Prior-year grants canceled	(115,000)	(1,261,736)
Prior-year grants returned	(10,587)	(15,636)
Direct charitable activities	5,166,599	4,785,485
General and administrative	11,907,655	9,532,843
Total grants and expenses	\$135,933,524	\$115,542,842
INCREASE (DECREASE) IN NET ASSETS	94,912,792	(174,807,166)
Net assets – Beginning of year	1,101,979,709	1,276,786,875
Net assets – End of year	\$1,196,892,501	\$1,021,122,738

"Everybody knows the Community Foundation.
It's a very trusted presence in the community."

— Cecile Aitchison, chief development officer at Alternatives For Girls

Partners



Supporting our community is a labor of love that requires immense collaboration and dedication.

The Community Foundation for Southeast Michigan would like to acknowledge all of the individuals and organizations that give their talent, time and treasure to ensure our region is a desirable place to live, work and play for all people.

This includes our advisory committees, supporting organizations, affiliated foundations, trustees and staff.

We couldn't do it without you.

Affiliated Foundations

The following affiliated foundations are administered as part of the Community Foundation for Southeast Michigan. Each affiliate is dedicated to building charitable resources for a particular geographic area within southeast Michigan, and to investing those resources in programs and organizations that are working to enhance the quality of life in that area. An advisory committee of civic leaders leads each affiliate and is supported by local individuals, families, businesses and nonprofit organizations committed to building a strong and vibrant community. Community Foundation staff members assist each affiliate in making effective investments in local nonprofits and helping donors fulfill their charitable interests.

Chelsea Community Foundation

The Chelsea Community Foundation was formed by the Foundation for Community Care and the Civic Foundation of Chelsea, and became affiliated with the Community Foundation for Southeast Michigan in 1995.

Advisors

- Anne Merkel, Chair
- John Daniels, Vice Chair
- Peter M. Feeney, Vice Chair
- Anne E. Mann, Immediate Past Chair
- Matthew A. Doan
- Rick Eder
- Doris Galvin
- Peter Heydlauff

- Willard H. Johnson
- Andy Kellogg
- Jeff Klink
- Brian Lantis
- David M. Schaible

Chelsea Community Foundation Fund

This is the general endowment for the Chelsea Community Foundation. It supports and promotes educational, scientific, literary, cultural and charitable purposes, primarily in and for the residents of the Chelsea community. The following funds have been established by individuals, families and businesses that care deeply about the quality of life in Chelsea.

- Chelsea Lumber Company Fund
- Chelsea State Bank Community Enrichment Fund
- Jeff and Kathleen Daniels Fund
- John Daniels and Jodi Daniels Fund
- Robert and Marjorie Daniels Fund
- Doan Family Fund for Chelsea (Established by Mr. and Mrs. Dennis D. Doan)
- Dunn Family Fund (Established by Mr. John F. Dunn)
- Michael and Ann Feeney Fund
- Bart and Maribeth Hammer Family Fund
- Dudley K. and Dawn C. Holmes Jr. Fund
- Willard Johnson Family Fund for Chelsea
- Willard Johnson Family Fund for Youth

- Mary Beth Koeze Fund
- M.P.S. Fund (Established by Shirley A. and Paul G. Schaible)
- John K. and Anne E. Mann Family Fund
- Jack and MaryAnn Merkel Family Fund
- Weiser Family Fund for Children (Established by Ronald and Eileen Weiser)

Scholarships

- **Robert L. Daniels Scholarship Fund** Supports Chelsea High School graduates who are interested in pursuing a postsecondary education in the building trades or building technology.
- **George L. Palmer Scholarship Fund** Supports Chelsea High School students who are entering programs for trade or vocational studies, or are pursuing associate degrees.
- **Brewster E. and Emily C. Peabody Fund** Supports Chelsea High School students.

Community Foundation for Livingston County

In 1991, a group of civic leaders sought a way to support and improve the public well-being and quality of life in Livingston County, now and into the future. They established the Community Foundation for Livingston County as an affiliate of the Community Foundation for Southeast Michigan.

Advisors

- Timothy H. Corrigan, Chair
- Denise Brennan-Nelson, Vice Chair
- Michael J. Lay, Vice Chair
- Pat Convery
- Robert W. Herbst
- Sean LaRosa
- Frank J. Mancuso Jr.
- David D. Rex
- Phil Utter
- Doris C. Ostrander, Chair Emeritus
- W. Rickard Scofield, Chair in Memoriam

Community Foundation for Livingston County Fund

This is the endowment for the Community Foundation for Livingston County. It supports and promotes educational, scientific, literary, cultural and charitable purposes, primarily in and for the residents of Livingston County.

The following funds have been established by individuals, families and businesses that care deeply about the quality of life in Livingston County.

- Bell-Borek Fund
- Citizens Insurance Company of America Fund
- John and Anne Colone Fund
- Detroit Edison Foundation Fund for Livingston County
- E.D. Ewing Family Fund
- First National Bank Community Fund
- Francu/Ostrander Fund
- Fund for Today and Someday
- Robert W. and Elizabeth “Betsy” Herbst Fund for Livingston County
- Harry Malynowsky Fund Supports charitable educational programs that serve the residents of Livingston County.
- Parke Family Fund (Established by John Parke Jr.)
- Rex Family Fund for Literacy Supports and promotes literacy development for young children, ages birth to 5, and their families who are residents of Livingston County.
- John P. and Janet V. Rex Family

Fund for Livingston County

- Patricia Joann Riley Memorial Fund (Established by Clyde Riley)
- H.W. Sr. and Pearl S. Scofield Fund
- William B. and Joy O. Scofield Fund
- Dr. Roscoe V. and Barbara D. Stuber Fund

Scholarships

- **Cary A. Baldwin Scholarship Fund** Supports graduating seniors of Howell High School.
- **The Beta Sigma Phi Iota Chapter Fund** Supports Howell High School students who are entering medical-related programs at accredited educational institutions.
- **Bernie Gibbons Memorial Scholarship Fund** Supports Howell High School students who are pursuing postsecondary education.
- **Headland Solar Community Scholarship Fund for Fowlerville High School** Supports Fowlerville High School students who are pursuing postsecondary educational programs focused in agricultural science, agricultural business management, natural resources management, environmental sustainability, renewable energy science, engineering, or construction.
- **Imelda “Mel” and Ralph Lemar Scholarship Fund** Supports Fowlerville High School students who plan to study chemistry, physics, mathematics, or electrical or mechanical engineering.
- **Susan Rafferty Scholarship Fund** Supports students from Brighton High School who attend Michigan State University.

Advisory Committees

The Community Foundation works with a number of advisory committees. This partial list highlights some of our key committees.

Michigan Justice Fund Steering Committee

- Andrea Cole
- Janean Couch
- Adena Hill
- Mathilde Laisne
- Kylee Mitchell-Wells
- Scott Nolen
- Jed Oppenheim
- Kumar Raj
- Raquel Robinson
- David Rogers
- Damon Ross
- Kevin Ryan
- Michael Shaw
- Rinia Shelby-Crooms
- Nicole Sherard-Freeman
- Raquel Thueme

Detroit Auto Dealers Association Charitable Foundation Fund Committee

- Rod L. Alberts
- Hon. Trudy DunCombe Archer
- Sam Klemet
- Joe Lunghamer
- Doug North
- Lincoln Phillip
- David T. Provost

- Thad Szott
- Todd Szott
- Karl Zimmermann

HOPE Fund Advisory Committee

- Sabin D. Blake
- Mark D. Blanke
- Stephan Bobalik
- Karen C. Brown
- Stacey E. Cassis
- Derek E. Daniels
- Gilbert M. Frimet
- Henry M. Grix
- Howard W. Israel
- Shane Pliska
- Faye Schuett
- Linda Stechison
- Father Anthony P. Sulkowski Jr.
- Suzanne K. Wait
- Thomas P. Wilczak
- John Zervos

Pontiac Funders Collaborative Community Advisory Committee

- Sarah Maria Acosta Ahmad
- Sani Campoverde
- Blanca Mares
- Davida Reed
- Alex Resnik
- Kevin Sanders

Youth Advisory Committee

- Jackson Glover, Chair
- Zion Williams, Vice Chair
- Maryam Alavi
- Nurayda Albeez
- Mesomachi (Jessica) Anyanwu
- El Auria Atienza
- Alexandria Balde
- Christine (Cece) Balde
- Nadia Caesar
- Christopher Cole Jr.
- Margaret de la Fuente
- Solene DeGaynor
- Krish Desai
- Gracie Grady
- James Greenfield
- Bryan Hong
- Hayden Howard
- Armita Marpu
- Zion McCann
- Neil Murphy
- Sruthi Pereddy
- Jibraan Rahman
- Ritvik (Vik) Sampath
- Sameeksha (Sam) Sampath
- Riya Shah
- Priya Williams

Supporting Organizations

A supporting organization is a separate corporation or trust affiliated with the Community Foundation for Southeast Michigan. Supporting organizations offer donors significant advantages — favorable tax status and full participation in grantmaking and investment activities — while avoiding the financial and management burdens private foundations often encounter. Supporting organizations also take advantage of the professional support of Community Foundation staff, who assist in the administration of their funds. Donors may establish new supporting organizations or transition existing private foundations into supporting organizations at the Community Foundation.

The Matthew and Karen Cullen Family Foundation

The Matthew and Karen Cullen Family Foundation provides the means to improve and sustain the quality of life for youth in our communities.

Foundation for Detroit’s Future

The Foundation for Detroit’s Future is a nonprofit affiliate of the Community Foundation. It was established to assist in Detroit’s emergence from bankruptcy and the restoration of the city’s economic and cultural vitality for the benefit of all residents of the city, region and state.

The Gilmour-Jirgens Fund

Allan D. Gilmour, former vice chairman of Ford Motor Co., established this fund in 1995 to support charitable organizations and activities of interest to him and Eric C. Jirgens. Grants from The Gilmour-Jirgens Fund are selected by the fund’s five-member governing board.

PEDALS

Positive Emotional Development and Learning Skills (PEDALS) improves preschool children’s emotional competence and skills.

The Russell Family Foundation

The Russell Family Foundation provides the means to improve and sustain the quality of life for youth in our communities. Areas of focus include programs for underserved youth, primarily in grades K–12.

Robert H. Tannahill Foundation

Robert Hudson Tannahill, a philanthropist and avid patron of the arts, created the Robert H. Tannahill Foundation in 1961. Today, the foundation continues to support the eight nonprofit organizations selected by the late Mr. Tannahill.

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Paul C. Hillegonds

Henry W. Lim

Michael T. Monahan

James B. Nicholson, Chair Emeritus

Reginald M. Turner

Barbara C. Van Dusen

Zion Williams, Vice Chair, Youth Advisory Council

Make an immediate impact, build a lasting legacy

Since 1984, the Community Foundation for Southeast Michigan has worked to improve the quality of life in our region. We help individuals, families, businesses, and private foundations — along with their professional advisors — to carry out their philanthropic goals.

We offer a variety of charitable funds, many of which can be established at \$10,000.



UNRESTRICTED

This is the most flexible of our funds, empowering the Community Foundation to identify and support projects that address urgent needs and unforeseen opportunities with an enduring legacy of public good.



FIELD OF INTEREST

These funds identify a focus area — such as the arts, youth or the environment — to support in perpetuity. The Community Foundation will make grants from the fund to partners doing work in the field of interest.



DESIGNATED

These funds provide a permanent income stream to one or more designated nonprofit organizations.



AGENCY

Established by a nonprofit organization, these funds support its mission in perpetuity.



DONOR-ADVISED FUNDS

An individual, family, business or private foundation can establish a donor-advised fund. These funds allow donors to appoint advisors to recommend grants and have an ongoing, active role in charitable giving.



CHARITABLE GIFT ANNUITY

These funds are invested to provide an income stream to one or two individuals during their lifetime(s), with the remainder of the gift supporting a named charitable fund.



SUPPORTING ORGANIZATIONS

A supporting organization is a separate legal entity managed by the Community Foundation. It offers the favorable tax benefits of a public charity, while leveraging our financial management and grantmaking expertise.



SCHOLARSHIPS

Scholarship funds help students throughout our region achieve their educational goals. The Community Foundation oversees the application process, coordinates with educational institutions, and tracks academic performance.

Thank you, donors!



At its core, the Community Foundation for Southeast Michigan is a collection of forward-thinking people working together to make life better in the region we call home.

Chief among these are the generous donors like you who give what they can — from a schoolteacher who mails in \$10 each month, to the wealthy philanthropist who creates an estate plan that secures their legacy of impact in the seven counties we serve.

Because of your gifts — and with support from our community partners, funders and volunteers — we can ensure southeast Michigan is a place where everyone thrives.



Visit cfsem.org/2023-2024-annual-report to view our full lists of grants, funds and donors.



Thriving Together

now and forever

Make a donation. Make a difference.

Your generous gift to our permanently endowed Now and Forever Fund ensures that the Community Foundation for Southeast Michigan has the talented people, up-to-date technology and necessary resources to make our region a desirable place to live, work and play — for all people, today and tomorrow.

To give: Visit [CFSEM.org/thriving](https://www.cfsem.org/thriving) or reach out to our Donor Services team at donorservices@cfsem.org or **313-961-6675**.



**Community
Foundation**
FOR SOUTHEAST MICHIGAN