Fearless

WHAT DOES IT MEAN TO BE FEARLESS?
You take the path less traveled.
You are confident you will succeed.
You are bold.
You believe in the strength of community.
You stand up for what is right.
You are determined.

At the Barry Community Foundation we celebrate our successes and fearlessly pursue opportunities to grow.

Mission
Improving lives by bridging resources.
<table>
<thead>
<tr>
<th>Month</th>
<th>Element</th>
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<tbody>
<tr>
<td>January</td>
<td>Letter to the community</td>
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<tr>
<td>February</td>
<td>1. arts and culture</td>
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<tr>
<td>March</td>
<td>2. environment</td>
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<tr>
<td>April</td>
<td>3. education</td>
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<tr>
<td>May</td>
<td>4. economy</td>
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<tr>
<td>June</td>
<td>5. neighborhoods &amp; community</td>
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<tr>
<td>July</td>
<td>Legacy society</td>
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<tr>
<td>August</td>
<td>Fearlessly growing</td>
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<tr>
<td>September</td>
<td>Barry Community Enrichment Center</td>
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<tr>
<td>October</td>
<td>6. health &amp; wellness</td>
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<tr>
<td>November</td>
<td>7. basic needs</td>
</tr>
<tr>
<td>December</td>
<td>Give the gift of giving</td>
</tr>
</tbody>
</table>
At the heart of all that happens at the Barry Community Foundation are the people who work and serve to make possible the dreams of donors.

Each staff and board member is also a community member; they know their neighbors. They are connected to our schools, our service organizations, our nonprofit organizations, and the unique nuances of each corner of the county.

Consistently, the staff and board members of BCF show up. They show up and they listen. When a community demonstrates a need or gathers around a passion, BCF is listening and is responsive in offering connectivity to needed resources. In this way, we are fearlessly and locally engaged.

Staff and board members also listen regionally networks. This results in applying emerging trends early. BCF is repeatedly fearless in paving the way when a resource matches community need and desire. From Program Related Investment Loans, to children’s savings accounts, from creating a nonprofit hub in the county, to re-imagining scholarships, from working with partners across sectors to make hands-on vo-tech programs possible, to knowing and caring about all 294 funds and fundholders at the Foundation, BCF is honored to lead Barry County bravely forward.

Bonnie S. Gettys
President and CEO

Shauna Swantek
Board Chair
January

1  New Years Day

7  8  9  10  11  12  13

14  15  16  17  18  19  20
  Martin Luther King Jr. Day
  Chamber Annual Dinner

21  22  23  24  25  26  27
  Leadership Barry County Opening Weekend
  Leadership Barry County Opening Weekend

28  29  30  31

February

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Tribute to an Artist

Ethel Denton Groos Memorial Scholarship

Ethel graduated from Cornell University in 1954 with a Bachelor of Fine Arts Degree. She chose Cornell because she considered a liberal education a critical element in the development of a complete education helping to develop objectivity and introduced the concept of multiple interpretations.

Ethel was very proud to be on the Board of the Kalamazoo Institute of Arts (KIA) when she passed away in 1999. The KIA had, by that time, become one of the premier art museums and schools in West Michigan, if not the state. She devoted much of her time and effort to ensure that there would be a quality local source of artistic exposure.

After taking time off to raise her five children, Ethel returned to the studio classroom at Aquinas College and the Kalamazoo Institute of Arts. Throughout her career as a painter, she enrolled in numerous classes and workshops to deepen her understanding of a variety of painting techniques.

Ethel understood the important role art plays in society and it is in this spirit as a life long learner that her children established a scholarship in her honor creating an opportunity for students in Barry County to pursue their journey in the arts.
February

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1 2 3
Mary Youngs Benefit Concert
4 5 6 7 8 9 10
Write Away Contest Entries Due
Show Me the Money Event
Green Gables Haven Auction
11 12 13 14 15 16 17
Valentines Day
18 19 20 21 22 23 24
Presidents’ Day
Walk for Warmth
25 26 27 28

March
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Margery raised 4 children and taught for 27 years. She remembered the joy that was experienced by her children when they received a tree to take home. She recognized that when a family planted the tree, they were creating a positive experience for their family resulting in something tangible that would grow with their family over time. Margery also had a passion for environmental sustainability and created the fund as a way to ensure that our youth understand the impact that trees have on our world. “Plant a tree and save the planet.” - Margery Martin

The Margery Martin Tree Fund distributes trees every year to each student at Delton Kellogg Elementary and Pre-School. The trees are ordered in the spring from the Barry Soil and Water Conservation District’s tree sale. They arrive in time for Arbor Day, and in some years, Earth Week. The trees are then packaged individually for their trip home with the students.

This fund was created by Margery in 2010 and distributes approximately 550 trees each year.
March

1 Scholarship Application Closed

4 Daylight Savings

11 YAC Grant Applications Due

18 St. Patrick’s Day

25 Good Friday

April

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NOW in its 3rd year, the KickStart to Career program continues to make its mark. It has impacted over 1,456 students and is being used as a model across the state to be implemented at other community foundations. While this is an immense achievement for the Barry Community Foundation, a great deal of thought and careful planning is being undertaken to ensure that once these accounts are opened, they are utilized. Bill and Nancy Bradley, executors of the Richard and Merilyn Foster Trust, felt that the children's savings program was such an impactful way to make a difference in the lives of children and a perfect way to honor the Fosters' wishes for their estate. They decided to use the Trust to create an endowed, matching fund that would forever incentivize deposits into the savings account.
Revvving up LOCAL ECONOMY

Impact Investment Program

Synonyms for CATALYST: stimulus, spark, spur, incitement, impetus. Launched in 2016 as a collaborative effort between the Barry Community Foundation and the Barry County Economic Development Alliance (BCEDA), the Impact Investment Program is intended to be a catalyst to positive development in the community. From the original genesis of the program back in 2014 as a method of gap financing for the much-needed Holiday Inn Express project in Hastings, to the recent utilization to fund the preliminary engineering for a proposed sewer expansion project to the Gilmore Car Museum and Hickory Corners, the Impact Investment Program is already a spark-plug. The Impact Investment Fund is focused on investing in projects meeting these four criteria: high-quality job creation and/or retention; direct or indirect increase to local taxable value; catalytic projects to the local community; and having a positive environmental impact. It is administered by the Barry County Economic Development Alliance through a partnership with the Barry Community Foundation and is overseen by a committee of BCEDA and BCF representatives. Specifically, the program is geared toward entrepreneurship and is a 100% local tool, with 100% local control over the application and approval process.

To find out more, contact the BCEDA at (269) 945-2454
BETWEEN November 2016 and February 2017, Putnam District Library staff members and community volunteers held seven group conversations called “Dine with Nine.” In all, there was participation by 115 community members from the greater Nashville area. These dinners were hosted by Putnam District Library, with financial support from the Barry Community Foundation.

In each conversation, people were asked who they would trust to assist them in achieving their dreams and overcoming community challenges. Three key organizations came up in nearly every conversation: the Nashville Route 66 Business District, Putnam District Library and Two or Three Together.

While people recognized that these are strong organizations, they also recognized they are already doing many things. When asked what would need to happen in order to create a desirable community, one participant summed it up by saying, “Let’s keep bringing groups together, instead of everybody doing their own thing. That’s what makes us a community... doing things together.”

Nashville desires to become a community that is: connected, engaged, thriving, safe and healthy. None of these aspirations stand alone and achieving one will help Nashville achieve another. It is the sweet spot in the middle....together.
LEAVING a legacy can be powerful. The act of caring for generations to come and providing for the future of others, is not only admirable, it is purposeful and significant. When you designate a gift in your will or estate plan to the Barry Community Foundation, you are leaving a legacy that will directly benefit Barry County and all of the people who live here. You also join those who have gone before you, encouraging growth and sustaining the beautiful landscape of life in our region.

GIVE more than you ever thought possible. Planned giving does not require a large income or vast estate, but only a thoughtful intention to make a difference in your community.

THE BEST TIME TO PLANT A TREE WAS 20 YEARS AGO. THE SECOND BEST TIME IS NOW.
- CHINESE PROVERB
July 2018

Barry Community Foundation Turns 23!

Independence Day

Gus Macker Tournament

Freeport Homecoming

August

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Growing into the FUTURE

Michigan’s Transfer of Wealth

OVER the next 50 years, $972 billion in financial and non-financial assets is expected to pass from one generation to the next in Michigan from the baby boomers – the wealthiest and one-time largest generation in U.S. history – to their heirs.

The Power of Giving Together

THEREFORE, navigating this latest transition will be critical and will present a one-time opportunity to create permanent benefits for Michigan. If only 5% of this wealth was earmarked for charitable endowment, the resulting $48.6 billion fund would generate hundreds of millions of dollars every year for local community projects and priorities across the state—forever. Michigan community foundations have established endowments focused on improving quality of life in each community, including the Barry Community Foundation.
<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
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<tbody>
<tr>
<td>10</td>
<td>Delton Founder's Festival</td>
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<td>11</td>
<td>Delton Founder's Festival &amp;</td>
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<tr>
<td></td>
<td>Chamber BrewFest</td>
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<tr>
<td>18</td>
<td>Middleville Heritage Days</td>
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<td>19</td>
<td>Middleville Concert</td>
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<td>22</td>
<td>Hastings Summerfest</td>
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<td>24</td>
<td>Hastings Summerfest</td>
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<td>26</td>
<td>Hastings Summerfest</td>
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WHEN I was 9 years old I began competing in the 4-H Culinary Competition. I didn’t win the competition but walked away from it with a new-found interest in culinary arts. I took a culinary course at the Barry Community Enrichment Center with Chef Justin Straube, owner of Seasonal Grille in Hastings, that concluded with preparing a four-course meal for 150 people. This experience revealed my love for cooking and Justin encouraged and helped me improve my skills along the way. More determined than ever, each year I entered the competition and 7 years later brought home the trophy.

I started working at the Seasonal Grille and took a college level culinary class with Chef Justin through Hastings High School. I continued to hone my skills and began applying to colleges to pursue my dreams of someday owning my own restaurant. Shortly after that, I was accepted to Johnson and Wales University, one of the most prestigious culinary colleges in the nation. This would not have been possible without the skills I acquired through the Culinary Arts Class at the Barry Community Enrichment Center and without Chef Justin’s commitment to helping me succeed.

Samantha Pennington, Culinary Arts Student
September

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October

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The Barry Community Foundation approved its second largest grant to date of $50,000 to Cherry Health to help expand access to primary health care in Barry County. This was all possible because of a new fund that was established at BCF – the Barry Health Access Fund. This fund was set up by the Barry-Eaton Health Plan (BEHP) and has been designed to carry out its mission to provide funding for health care services for the uninsured and underinsured.

The Barry Health Access Fund is also expected to grant approximately $25,000 annually toward health care access for the underinsured or underserved in Barry County beginning in the spring of 2020. Between 2017 and 2020, the Fund committee, which includes health care professionals and experts with experience working with the underinsured, will grant $100,000 to Barry County health care programs. A $50,000 grant to Cherry Health and a $15,000 grant to the Barry-Eaton Health Department were the first two grants from the fund.

Health care access grant applications will be accepted again in March, 2018.
October

TAEF Grant Applications Due

Columbus Day

BCF and YAC Grant Applications Due

Arts and Eats Tour

Halloween Day

Wilson H. Craig Jr. Grant Applications Due
The Family Economic Support Office (FESO) was created in order to assist individuals and families achieve financial independence by empowering them with the tools and skills necessary to maximize their income, build savings and gain assets. Funding has been provided by the Barry Community Foundation and its donors for three years, while a long term funding strategy is developed.

Integrated within Barry County United Way’s programming, the FESO resources include access to hardship and success loan funds, financial wellness workshops, financial and achievement coaching, free income tax assistance and an employer resource network that will embed these services into the workplace.
PEOPLE give for numerous reasons. Some have the desire to help and want to make a positive difference in the lives of others. Some want to leave a lasting legacy. Some want to make the world a better place for future generations. Whatever your philanthropic aspiration may be, we are a place where charitable giving becomes personal and meaningful. At the Barry Community Foundation we connect personal passions to lasting change and value gifts of all shapes and sizes whether it be of time, talent or treasure.

For a more detailed description of who we are, what we value and the numerous giving vehicles we offer, please download our Guide to Giving from our website or call the Barry Community Foundation to have a copy mailed to you.
<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
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<tbody>
<tr>
<td>1</td>
<td>2019 Scholarship Application Open</td>
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<td>24</td>
<td>Christmas Eve</td>
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<td>25</td>
<td>Christmas Day</td>
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<tr>
<td>31</td>
<td>New Years Eve</td>
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</table>
**Financials**

The Barry Community Foundation’s and Barry Community Enrichment Center’s financial statements are audited by Plante & Moran, PLLC. A full set of the audited financial statements will be available by contacting info@barrycf.org.

### GEOGRAPHIC AFFILIATES

The Barry Community Foundation supports philanthropic growth through affiliate Foundations in the neighboring Middleville and Delton communities by providing administrative support and investment services.

Each affiliate is represented by an advisory committee that reviews proposals and recommends grants. Detailed affiliate information is available upon request.

### THORNAPPLE AREA ENRICHMENT FOUNDATION

thornapplefoundation.org

- **$8,800** total grants awarded in 2017
- **$41,100** total scholarships awarded in 2017
- **$1,881,686** net assets 2017 fiscal year end

### DELTON KELLOGG EDUCATION FOUNDATION

dkef.net

- **$2,097** total grants awarded in 2017
- **$31,250** total scholarships awarded in 2017
- **$462,230** net assets 2017 fiscal year end

### SUPPORTING ORGANIZATION

**BARRY COMMUNITY ENRICHMENT CENTER**

Established in 2011, the Barry Community Enrichment Center brings together 11 partner organizations for centralized access to assistance and support services. Formerly the Hastings First Presbyterian Church, the Center has undergone several renovation projects and now boasts a modernized performing arts center, as well as a state of the art commercial kitchen.

- **$1,884,932** net assets

### COMMUNITY CONTRIBUTIONS

Each and every donor who partners with the Barry Community Foundation in making a long-term commitment to our community is a valuable piece of our success.

- **$4,803,411** barry community foundation in 2017
- **$160,911** affiliates in 2017

**TOTAL GIFTS** $4,964,322

The Barry Community Foundation’s and Barry Community Enrichment Center’s financial statements are audited by Plante & Moran, PLLC. A full set of the audited financial statements will be available by contacting info@barrycf.org.
COMMUNITY INVESTMENTS

BCF community grant requests are accepted annually on October 15th for distribution in December. For the 2017 fiscal year grant dollars were awarded to the organizations shown below.

<table>
<thead>
<tr>
<th>Organization</th>
<th>Grant Amount</th>
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<tbody>
<tr>
<td>Serenity Village</td>
<td>$4,804</td>
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<tr>
<td>Delton Kellog Elementary - STEAM</td>
<td>$696</td>
</tr>
<tr>
<td>CERC Scoreboard</td>
<td>$3,000</td>
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<tr>
<td>Sunny Crest Youth Ranch</td>
<td>$3,500</td>
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<tr>
<td>Township of Orangeville</td>
<td>$1,000</td>
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<tr>
<td>Delton District Library</td>
<td>$6,000</td>
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<tr>
<td>Pierce Cedar Creek Institute</td>
<td>$10,000</td>
</tr>
<tr>
<td>Thornapple Area Parks and Rec</td>
<td>$6,000</td>
</tr>
<tr>
<td>3 Year Priority Education</td>
<td>$23,217</td>
</tr>
</tbody>
</table>

FOUNDATION TOTAL ASSETS BY FISCAL YEAR

(fiscal year July 1 - June 30)

- 2017: 33,651,648
- 2016: 30,384,776
- 2015: 29,035,667
- 2014: 28,251,443
- 2013: 23,857,435
- 2012: 19,216,776

All totals obtained from consolidating balance sheet.

INVESTMENT ALLOCATION

- Global Equity: 28.8%
- Fixed Income: 26.1%
- Asset Allocation Funds: 27.5%
- Alternative Investments: 16.3%
- Cash: 1.3%

The Barry Community Foundation serves the common good in Barry County – building a strong community by engaging people in philanthropy and developing the community’s permanent endowment – now and for generations to come. To balance current and future needs, BCF employs investment and spending policies designed to preserve foundation asset values while providing a substantial flow of income.

The Barry Community Foundation’s Investment Committee and its consultant, Graystone Consulting, meet regularly to review investment risks and opportunities. Asset allocation proves critical to successful foundation performance. The asset allocation policy combines tested theory and informed market judgment to balance investment risks with the need to preserve the purchasing power of the assets.

- William S. Messner, CIMA | Graystone Consulting
Staff

BONNIE GETTYS  
President & CEO

ANNIE HALLE  
Vice President of Operations

AMY MURPHY  
Program Director

SARAH ALDEN  
Program Associate

MEGAN MCKEOWN  
Communications Director

JILL YOUNG  
Bookkeeper & Office Manager

TIM GIRRBACH  
Building Support and Maintenance

JOHN GALLAGHER  
Building Support and Maintenance
Board of Directors

FROM LEFT:
Bob Perino, Marcia Szumowski, Bonnie Gettys, Amy Murphy, Dave Coleman, Fred Jacobs, Tim Girrbach, Kim Norris, Annie Halle, Korin Ayers, Megan McKeown, Barb Case, Scott McKeown, Shauna Swantek, Sarah Alden, Diane Gaertner, Dave Solmes, Cheryl Bower, Jill Young, John Gallagher
In Barry County we don’t rely on others to get work done for us. We rally together and fearlessly take matters into our own hands to achieve the outcomes we desire. We lift one another up and form meaningful relationships with others who share the desire for positive change. We meet each new day fearlessly determined to make our mark and leave this place better, stronger and more united for generations to come.

Thank you to all of those who had a hand in helping make the vision of this report a reality! It is such a great reminder of how ingrained the Foundation is throughout the county. Thank you to all of our generous donors and volunteers for supporting the Barry Community Foundation, its vision and the work that it does in Barry County each year.