

INVESTING

in the future of our community



A letter from the CEO and Board Chair

Investing is an activity that threads itself through all aspects of a community foundation’s work. At the core it is reciprocal – donors invest in us, and we invest in Oceana County. We financially invest our assets, growing community capital for the future. By responding to our county’s evolving needs and aspirations, we invest in people, places and projects to all thrive together.

In this report, we celebrate the stories of investment in new parks, people gaining new skills and credentials, and communities feeling new optimism. The unique value of a rural community foundation is the opportunity to make a difference with gifts of all sizes. While large transformational gifts can make big dreams happen and put Oceana on the map, investing with small gifts can also transform a classroom, buy food for the hungry or help fix an adult learner’s car.



Tammy Carey
Tammy Carey
 CEO



Joseph H. Klimovitz
Joe Klimovitz
 Board Chair

In 2023 we received over 1000 gifts totaling \$2.6 million and gave back over 600 grants totaling \$2.7 million. With three decades of serving Oceana and four years now operating as an independent community foundation, we are poised to move our organization into the next decade of growth and impact. We will continue to be in pursuit of deep social impact and focusing on being strategic, but we will also be opportunistic. We invite you to make a gift in response to one of our challenge matches below.

Thank you for investing in the potential of Oceana County – we are so grateful for your partnership and wish you a wonderful holiday season!

WILL YOU INVEST *with us?*

We have a couple special anonymous donors that are seeding challenge matches for our next decade of growth. We invite you to help us maximize these opportunities by making a donation before December 31, 2024.

CHALLENGE MATCHES

\$25,000

Administrative Fund

\$50,000

Community Investment Fund

\$50,000

Building Fund

Foundation and Oceana CAN! staff enjoying the lush views of Pleasant Valley Winery after a successful Trustee reception – read more about our investment in people on page 6.

2023 Annual Report

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This popular viewing platform at Claybanks Township Park is now set to last another 30 years thanks in part to an investment from the Henry & Dorothy V. Fisher Family Fund – read more about Dorothy’s story on the back cover.



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Follow the
Oceana Community Foundation
to stay up-to-date throughout the year!

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Alicia Ortega
*AmeriCorps
Outreach Coordinator*

On our cover

A child plays at the newly opened
Shelby Township Community Park.
Read more page 4

The Oceana County Community Foundation is a 501c-3 nonprofit organization designed to help people create a lasting impact. With over 200 funds established since 1989, we work with donors, nonprofits, businesses, leaders, doers and more to make our county a stronger, healthier, more vibrant place to live. By connecting donors with causes personal to them and responding to ever-changing issues, we are all united around common goals of improvement, positive change and equitable access to resources for everyone to thrive.



PRIORITY AREAS
SHELBY
 Housing
 Downtown Revitalization
 Quality Jobs
 Inclusive Community

INVESTING *in Community*

SHELBY TOWNSHIP

Nearly four years after a seed gift that sparked the idea, Shelby Township Community Park officially opened on a warm Saturday in August this year. The Foundation has been a proud partner in the park’s progression, acting as the fiscal sponsor for its \$5 million fundraising campaign.

Foundation CEO Tammy Carey co- led the park’s campaign with Shelby Township Supervisor Richard Raffaelli. The Foundation helped connect donors, community residents, and the park’s advisory committee, hosting numerous gatherings and feedback sessions. The Township is following the successful campaign and build with a Phase II goal of adding an Indoor Sports Complex, fueled by a recent \$2.5 million Community Enhancement Grant from the State of Michigan, to be matched by a private donor.

Shelby Township is strategically investing in projects aimed at attracting new residents and growing its economic opportunities through a master plan developed with stakeholder involvement, including a community assessment project with the Foundation. These initiatives include new parks & recreation, expanding affordable housing options and strengthening water infrastructure to support housing developments, building a new elementary school, a daycare facility, and improving roads.

In recognition of those accomplishments and the opportunity to collaborate on many of the projects, the Foundation awarded Shelby Township the Community Builder Award at their annual event in September. Earl and Linda Peterson were lead investors on the large-scale recreation park, along with championing the creation of the West Michigan



Research Station and the Shelby Acres housing development. In recognition of their significant investments in Oceana County, they were selected as recipients of the Foundation’s Greater Good Award.

COMMUNITY ASSESSMENTS

In 2018, the Foundation was selected by the Council of Michigan Foundations to participate in the Rural Economic Development Cohort initiative. We decided to pursue this opportunity to help meet our strategic plan goals of better understanding and meeting community needs. The Shelby area was selected for the first assessment and a team of community leaders was recruited to gather information around economic development activities, conduct the assessment, and build relationships with state economic development funders. During the assessment a cross-section of community leaders and residents shared their thoughts, feelings and aspirations about the Shelby area (see box on this page for top priority areas).

A second community assessment was conducted by a similar process in the Pentwater area in June of 2019, led by the Pentwater Vision Team. In collaboration with the Village of Hesperia, the Right Place, and the Oceana County Economic Alliance, the Foundation completed a community assessment with Hesperia in fall 2021. Our most recent community assessment, in Walkerville, was conducted in January 2024.

PRIORITY AREAS
HESPERIA

Downtown Revitalization
Improved Communication
Focus on Recreation Assets
Youth Needs
Housing

Sparking Investments on the East Side of the County

HESPERIA

One of the most important objectives identified in the August 2021 Hesperia Community Assessment was to highlight the area's natural beauty. Expanding recreational spaces, especially around the White Lake Dam, was a priority for community leaders, business owners, and residents.

The adage “we are strong together” came to life in support of the Hesperia Beautification Committee's \$140,000 project to build a multi-use pavilion in Vida Weaver Park, a recreation space next to the White River and the Village's downtown. The Committee broke ground on Vida Weaver Park Pavilion in Spring 2024, made possible through support from Oceana County's American Rescue Plan Act funds (\$25,000), the Michigan Economic Development Corporation (\$45,000), the Village of Hesperia (\$25,000), and \$5,000 from the Foundation's Youth Fund and the Edward and Evelyn Kolbe Fund.

PRIORITY AREAS
WALKERVILLE

Grow Business & Retail
Develop Community Center
Human & Childcare Services
Rebuild Community & School
Housing & Infrastructure



WALKERVILLE

In its fourth Community Assessment, the Community Foundation partnered with Lake-Osceola State Bank and local leaders to meet with Walkerville residents, business leaders, and youth to discuss the village's future. An underlying sense of hope ran through the visioning process, a town hall, and focus groups as participants discussed their intentions to rebuild Walkerville's sense of community and morale. Following the Assessment, Walkerville Thrives launched the Walkerville Rebuild Community Committee to invite area residents to be a part of the change.

The newly inspired Committee hosted several fun-filled events, including a Midsummer Madness Cornhole Tournament and Community Picnic – an idea inspired by feedback from area youth. Residents were also passionate about supporting their local school and especially wanted to see their hometown band return. The school received \$7,500 from the Electric Forest Charitable Fund Music Give-back

Program, and was supported by nine other Foundation funders to help purchase instruments and other needed equipment to officially bring band class back this September! Alessandra Dronchi, the new Music Teacher for Walkerville Public Schools, said, “It is completely life-changing for our school and music department.”





Ashley Guardiola



Daisy Mendez



Alicia Ortega



Sidney Ibarra

INVESTING *in People*

In today's job market, candidates often need both experience and credentials to be competitive. The Foundation is building opportunities for Oceana residents to develop their workforce skills through offering summer internships, AmeriCorps service opportunities, and the Complete Your Degree (CYD) program.

This summer, the Foundation welcomed Ashley Guardiola and Daisy Mendez to its family as interns. Daisy is a recent graduate of Ferris State University, while Ashley currently attends Michigan State University. Their work at the Foundation was tremendously appreciated, as they gained new experience in communications, event management and graphic design. Starting in October, Alicia Ortega, a recent Central Michigan University grad from Shelby, will be joining the team as an AmeriCorps member. She will serve a dual role as Community Outreach Coordinator for the Foundation and for Oceana College Access Network. The Foundation intends to continue its summer internship and AmeriCorps programs to help introduce Oceana graduates to philanthropy in their hometowns and support their growth as rising professionals.

COMPLETE YOUR DEGREE PROGRAM

This fall marks the third year of CYD! The program has grown to support 12 current adult learners with three graduates pursuing degrees or credentials at West Shore Community College or Muskegon Community College. In addition to multi-year scholarship support, CYD provides life-needs funding and success coaching to students. Knowing that the cost of education does not stop at tuition, CYD's life-



needs funding addresses success barriers such as the cost of food, childcare, technology, housing, transportation, and more on a case-by-case basis. Foundation Program Officer Hannah Naples offers success coaching by providing information, resource referrals, encouragement, and support to help participants meet their goals. Providing life-needs funding and success coaching reduces students' emotional and financial stress and helps them navigate the often-confusing world of post-secondary education.



SIDNEY'S STORY

Current CYD participant Sidney Ibarra embodies the hope and tenacity of Oceana's adult learners. Sidney entered the workforce right away, despite graduating from high school with high grades, citing transportation and cost as barriers to further education. She later became an associate teacher at Shelby Early Childhood Center where her kids were students. In mapping her journey through CYD, Sidney wrote, "I thought about attending college for a teaching degree, but I couldn't imagine taking on the debt. I had not been to school in many years, and I'm not sure I felt worthy of the expense or even capable of adequate grades. I signed up for CYD with low hopes but was coached and made to feel worthy of accomplishing goals. Now you can find my name in the newspapers for high honors from our local college. I am a preschool teacher and plan to continue my educational journey until I earn an Early Childhood K-3 teaching certification. CYD helped someone like me, who never felt worthy enough to commit to the debt of school, achieve my goals and become a teacher." Sidney shared her story to highlight how CYD is changing the lives of participants, their families, and their communities.

INVESTING *in Each Other*



Warren Buffet once observed that “trust is like the air we breathe—when it’s present, nobody really notices; when it’s absent, everybody notices.” At the Foundation, trust is an essential component of our work. As donors trust us with their gifts, we trust our partners and the community trusts our work. The Foundation practices trust-based philanthropy, rooting philanthropic relationships in mutual respect. Instead of micromanaging partner non-profits on how their grants are implemented, trust-based philanthropy believes that our partners are experts in their programs. If needed, we work with grantees to pivot their funding to support a different program or approach that aligns with the original intentions. The Foundation is focused on building community capital by being a trusted partner in the community and a connector.

The Foundation’s faith derives in part from its growing relationships with Oceana non-profit organizations, which are facilitated by our Program Officer, Hannah Naples. She works with staff and partners to host Oceana Free Dives, a quarterly education and networking series that emerged from collaborative resource meetings held during the pandemic, when the significance of ongoing dialogue between non-profits facing those challenges was dramatic. “By working together, we amplify each other’s work to create synergy,” Foundation CEO Tammy Carey explained. “Instead of one organization trying to make an impact alone, these events connect us together to create collective change on a wider scale.” Topics were generated during the first Deep Dive in April 2023, as participants identified the most pressing concerns of Oceana’s nonprofit ecosystem, including housing and homelessness; government, economic development, and job creation; food insecurity and healthcare; diversity, equity and inclusion; resources and nonprofit collaboration; and daycare access and youth issues.

Just as the Foundation continues to invest in local nonprofits, other foundations are investing in our organizational growth. The Foundation received numerous grants in the past year to build programmatic and organizational capacity. The Gerber Foundation has been a long-time supporter of Read Early, Read Often, including a recent award of \$8,000 to purchase new literacy materials. Trinity Health awarded the Oceana College Access Network and Complete Your Degree scholarship program with a combined \$25,000, and \$5,000 from the Richard M. Schulze Foundation supported the Urgent Needs Fund. The generous support from Michigan’s foundations to the Foundation extends past supporting programs. The MET Foundation awarded \$5,000 to unrestricted grantmaking and operational capacity and the Council of Michigan Foundations granted Foundation staff \$1,700 towards professional development. Lastly many donors have contributed to our operations and administrative funds, helping to meet expenses and engage in leadership activities.

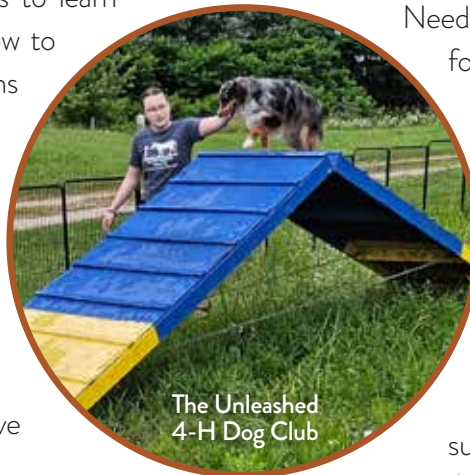


Quarterly Nonprofit Education and Networking Series - growing relationships and collaboration.



INVESTING *in Youth*

Over the past 35 years, the Foundation's Youth Advisory Council (YAC) has awarded 578 grants to local organizations, totaling over \$576,000. Hundreds of Oceana students from high schools across the county have participated in the program that brings together Oceana teens to learn more about leadership, philanthropy, and how to positively impact Oceana youth for generations through intentional grantmaking. YAC volunteers also work hands-on throughout the school year on issues important to younger community residents, overseen by YAC Advisor Maggie Payne, a YAC alum who served while attending Walkerville High School. These student-philanthropists have awarded \$131,273 in 116 grants in the past five years alone.



The Unleashed
4-H Dog Club

The West Central Michigan Horticultural Research Inc. is partnering with Oceana County schools to create a county-wide F.I.R.S.T. robotics team for Oceana high school students. FIRST (For Inspiration and Recognition of Science and Technology) is a global non-profit organization advancing STEM (science, technology, engineering, and math) education. This year, the Youth Fund awarded the team a \$4,500 grant to help establish a work/build station at the West Michigan Research Station. The robotics team also hosts competitions and helps students learn teamwork and leadership skills traditionally unavailable to rural students.

A \$1500 grant from the Oceana Youth Fund went to the Oceana County 4-H this year for The Unleashed Club, a youth-focused dog-training program designed to help students and their dogs build skills together. The program, part of 33 clubs and committees in the local 4-H program, was initiated in 2022. Teens work with their dogs, teaching their

canine companions agility, obedience, and showmanship skills while students learn pet management, nutrition, and service dog opportunities. Through the grant the club was able to purchase portable fencing to create a safe practice space outside Elbridge Township Hall.

Mental health is a priority for YAC, as its recent Youth Needs Assessment reported the greatest issues for area youth are stress from schoolwork, vaping use, bullying in school, depression/suicidal thoughts, and lack of self-esteem. The Community Foundation's annual Nonprofit Wish List identify specific items needed by local organizations. Fountain Hill Center, a local mental health nonprofit operated by therapists in New Era and Grand Rapids, requested new supplies for school therapy sessions, such as art supplies, interactive play toys, and games. Aligning with the Needs Assessment, YAC granted the Center's wish by providing \$475 in funding.





The Foundation gave a \$4,000 grant to the Medical Care Facility from the Urgent Needs Fund to enhance an outdoor courtyard with new landscaping, patio furniture, a mural, shade structures, outdoor speakers and a “hydration station” to invite residents to gather in safe outdoor spaces that appeal to all the senses.

INVESTING in Seniors

With bountiful natural resources and miles of beautiful Lake Michigan shoreline, Oceana County is highly attractive as a retirement destination as well as a lifelong residence. Significant growth in senior households is projected, prompting the need for investment in supporting older adults. From medical care to basic needs to recreation, addressing the needs of older adults encourages Oceana County residents to enjoy their community in their later years. This year, the Foundation partnered with Hospice of Michigan, the Oceana Council on Aging, the Oceana County Medical Care Facility, and AgeWell Services of West Michigan to make our community a safer, more accessible place for seniors.

For individuals with life-limiting illnesses and their families, the comfort of home care is invaluable. Hospice of Michigan’s home-based NorthStar Palliative Care (NSPC) provides terminally ill patients and their families with support to address their pain and quality of life in partnership with their physicians. NSPC supports patients and their caregivers through specialized medical care, including guidance on difficult conversations about care, management of symptoms and pain, and navigating the complex web of providers and available resources. A \$5,000 grant from the Randall and Linda Wagner Family Fund supports these services in Oceana County.

Access to walkers and wheelchairs can be life-changing for adults with limited mobility, especially those without insurance coverage or far from repair technicians. With a \$2,700 grant funded by The Healthy Youth, Healthy Seniors Fund, the Bessie E. & Ethan Allen Gray Health Fund, and the Ordoobadi Family Fund, the Oceana Council on Aging (OCCOA) is launching an Assistive Device Clinic to provide free device maintenance and information. OCCOA is partnering with assistive device experts from CareLinc and the Disability Network of West Michigan to hold six clinics in Hart, Rothbury, and Walkerville throughout 2024 and 2025.

“I enjoy helping my community and the clients have become good friends. One lady has been on my route since I started nearly 20 years ago.”

- Meals on Wheels driver Gordon & wife Janice Merten



From grocery shopping to meal preparation, sitting down with a warm, healthy meal can be daunting for homebound seniors. AgeWell Services of West Michigan provides nutritious meals and warm smiles to these seniors through its Meals on Wheels program. For the past five years, the Foundation has partnered with AgeWell to extend Meals on Wheels into Oceana County through more than \$14,000 in grant funding made possible through the Bessie E. & Ethan Allen Gray Health Fund, the William R. Lathers Foundation, the Elaine and Lee Curtis Fund, the Healthy Youth Healthy Seniors Fund, and the Community Investment Fund.

\$294,000

TOTAL INVESTMENT IN STUDENTS

OF RECIPIENTS
181

2024

SCHOLARSHIPS

OF SCHOLARSHIPS
264

OF APPLICANTS
120

Where are the students going?

40 total Institutions



20

Grand Valley State University

20

West Shore Community College

16

Michigan State University

12

Ferris State University

11

University of Michigan

8

Muskegon Community College

55

Scholarship Funds

\$7.2 million
Total Scholarship Assets

81

Scholarship Renewals

39%

First-Generation College Students

20%

Students Attending Community Colleges

INVESTING in Education

TEACHER MINI GRANTS

Teachers working directly with students best understand the needs of their classroom. The Mini-Grants program offers up to \$250 yearly for classroom needs. This year Olivia Mixer's 4th-grade classroom at Hesperia Public Schools used \$150 to subscribe to an educational program using music and bright visuals to help students memorize new information. Kelly Sisung's coding classroom at Pentwater Public Schools added a \$500 3-D printer so middle and high school students can grow their coding, design, and application engineering skills. Hart principal Brandon Bruce received \$250 to finance a weekly yoga/relaxation class for teachers at Spitler Elementary School. In 2023, the Oceana Youth Advisory Council awarded over \$9,500 to 35 local teachers in partnership with donor advised funds at the Foundation.

This year, Kay Vronko's K-2 grade classroom at Walkerville Public Schools received \$250 to purchase Math Stackers, an interactive 3-D modeling tool to help young students better understand concrete and abstract concepts. Since 2018, nearly 200 grants have been awarded as part of the Foundation's Teacher Mini-Grant program, putting over \$50,500 directly into Oceana classrooms.



Scholarship donor, Elaine Curtis, enjoying a special moment with two Pentwater grads.

Student Voices

"I've been working while attending classes to cover my tuition and enable me to finish my education. I'm one step closer to getting my degree because of you!"

Alexander Calixto, UofM college student

"This really means a lot to me since I will be the first in my family to attend university, and all I want is to make my family proud; with this scholarship, I am one step closer to achieving that." Ariana Hernandez, Hart HS

"I will be working through college so every bit counts. With this scholarship it helps my family to be seen & alleviate the stress of college" Hailey Jones, Shelby HS

"My passion for art started from a very young age and I cannot picture myself doing anything else. The amount of people from my town who go to college is small and your scholarship makes all the difference" Jenna Brown, Hesperia HS

"I was worried I wouldn't be able to do college at all due to having no money to pay for it. Every scholarship I receive is a big help." Zeontae DeLaPaz, Walkerville HS

"This scholarship will help me achieve my goals so I can return and give back to the community that has helped me for so many years." Marissa Sayles, Northern MI College Student

READ EARLY.

READ OFTEN PROGRAM (RERO)

For almost ten years, the Foundation has also supported the educational needs of Oceana County through the RERO program, a Foundation-led initiative helping to connect young readers with high-quality books and promote early literacy. Part of RERO's growing impact across our county is the strength of its partnership with the Mason-Lake-Oceana Great Start Collaborative (GSC), working together to improve young children's reading skills and academic future. Examples of this collaboration can be found across the County – the literacy bus at local events, book walks (both permanent & pop-up), play & learn groups and the new pedal pad at the Shelby Township Park.



COMMUNITY WISH LISTS

The Community Wish List, organized by the Foundation from requests by local non-profits, is also a regular source of support for education. Oceana Christian Schools received support from the Zack Snider Agricultural Memorial Fund to expand the school's new library by adding books and magazines and purchasing TubeLox toys that support science, technology, engineering and math education. Shelby High School received support from Robert and Mary Sue Cunningham to purchase 12 new Texas Instrument TI-84Plus calculators, a must-have for students in advanced math classes.



COMMUNITY GRANTS

During the Foundation's Community Grant Rounds in 2023, Pentwater and Walkerville Public Schools each received \$5,000 in awards to invest in multi-year initiatives. Pentwater Public Schools is revamping its music program over the next three years by purchasing new percussion instruments through an award from the Oceana Youth Fund and the Little Point Sable Arts Fund. Thanks to a \$5,000 award from the Oceana Youth Fund and the Ordoobadi Family Fund, Walkerville Public Schools sent the school's talented paraprofessionals to the HIVE Literacy Conference in Denver. With your help, the Foundation is investing in the future of our community.



Child enjoying the "Have You Filled a Bucket Today" pop-up book walk

Children selecting new books from the Literacy Bus



INVESTING *in Recreation*

Creating spaces for Oceana County residents to get outside provides enjoyment and impacts health by offering opportunities to engage in exciting forms of play and exercise. Recent investments in community recreation include new construction or renovation, notably the Shelby Township Community Park (see page 4 for story), Fairway to Heaven Disc Golf Courses along Lake Michigan, School Section Lake Public Beach outside Walkerville, and Getty Park in downtown Shelby.

Disc golf is a growing sport for youth and adults alike, as players try to toss their frisbee into a target. The Fairway to Heaven Disc Golf Courses opened in Pentwater in the spring of 2024 to provide enthusiasts with a new challenge along the lakeshore. The \$60,000 project was led by the Michigan Area United Methodist Camping - Lake Michigan Camp & Retreat, a Christian campground in the northern corner of the county. The scenic and unique Pro and Family/Ace courses were designed by Jim Schultz of Eagles Wings Disc Golf. A \$3,000 grant from the Community Investment Fund helped purchase wood tees, course-side benches, an information kiosk, and gravel for its parking lot. The courses are open to the public for a small fee and the Camp hosts tournaments throughout the season.



School Section Lake beach in Colfax Township welcomes summer visitors from neighboring campgrounds and year-round residents to its shore. Colfax Township used a \$4,000 grant to replace its outdated cooking grill and non-accessible



School Section Lake beach in Colfax Township

picnic tables and constructed an accessible path and concrete hardtop. Colfax residents suggested adding ADA-compliant park amenities to School Section Lake at township board meetings. The Township partnered with the Disability Network of West Michigan to choose design and materials, while construction was provided by volunteers and a local contractor. The Oceana Youth Fund, the Oceana County Parks & Trails Fund, and the Community Investment Fund supported Colfax Township's grant.

Getty Park has fulfilled many roles in the community of Shelby — it's a hangout for students after school, a recreational space for athletes, and a playground for young children and their parents. Conveniently located near the Shelby District school complex and downtown Shelby, the renovated park will add new amenities for the community to enjoy. In partnership with the Shelby Optimists Club, the Getty Park Renovation Fund at the Foundation helped to seed initial fundraising efforts of over \$140,000 towards community matches of state grants. The Park is slated to get open in 2025 and will be larger than the original, offering a fireplace, covered pavilion, pickleball and basketball courts and a much-anticipated splash pad.



Getty Park in Shelby

INVESTING *in Basic Needs*

When the Foundation established its Urgent Needs Fund during the COVID-19 pandemic, its Board of Directors recognized that its purpose would outlive the pandemic as families struggled to meet their basic needs. Now, five years after COVID's original appearance, the Urgent Needs Fund continues to help address resource gaps and barriers throughout the county. In 2022, the Fund awarded \$5,000 to the Oceana County United Way of the Lakeshore's two emergency cash assistance programs in Oceana County, providing household emergency loans and reimbursements for basic needs like food or rent. While the Community Foundation's Urgent Needs Fund continues to be strong after its fifth anniversary, it is only one way that the Community Foundation invests in multiple types of resources to meet residents' basic needs.



Trinity Lutheran Church food pantry walk-in freezer

Family Promise of the Lakeshore knows that one financial emergency can escalate into catastrophe. For families facing housing difficulties, an unforeseen cost can lead to homelessness. To assist their essential work of keeping Oceana families in their homes, Family Promise received a \$5,000 combined grant from the William R. Lathers Foundation, the Community Investment Fund, and the Homeless Prevention Endowment Fund. Through its Eviction Prevention and Housing Stabilization Program, Family Promise provides short-term financial assistance to households to cover expenses for rent, utilities, car repairs, gas, medication, and groceries to help them regain their footing and prevent eviction. In addition to financial support, the program provides case management assistance, coaching, and life skills training to build up participants' financial literacy.

The pandemic increased food insecurity in Oceana County, a trend that the Trinity Lutheran Church's food pantry has witnessed, with a 60% increase in the use of its services since 2022. With usage continuing to grow, Trinity Lutheran Church launched a \$65,000 campaign to update its pantry and add more freezer and cooler space. The Sparks/Ryan Memorial Fund awarded \$5,000 to the project. Expanding the Church's food pantry will allow for greater storage of nourishing food like meats, dairy, fruits, vegetables, and cheese.

Everyone deserves water and access can become insurmountable for some families living outside of municipal water systems. Two families received support to replace failed wells through the collaboration of Love INC, The Ladder Community Center, and the Foundation. Love INC acted as the fiduciary partner for the effort, while the Foundation collected donations and grants on their behalf to cover funding gaps. The Community Investment Fund, the Bob & Wilma Beckman Love Your Neighbor Fund, and the Raffaelli Family Fund, along with other anonymous private donors, provided a collective \$5,000+ for the new wells.

Access to essential resources, like personal items and school supplies, can influence a teen's sense of self, confidence and relationships. Through the Foundation's Community Wish Lists, Shelby High School and Staircase Youth Services assisted youth in need by closing their resource gap. Shelby High School received \$450 to resupply its student support closet with binders, backpacks, pencils, deodorant, feminine products, toothbrushes, combs, and more from an anonymous donor. Similarly, Staircase Youth Services had its wish list request doubled through an anonymous donor and the Ordoobadi Family Fund. Through its \$600 grant, Staircase Youth Services purchased bedding, dishes, cleaning supplies, and hygiene products for teens in its homelessness prevention program.



INVESTING in Opportunity

CAMPAIGN FUNDS

Oceana Conservation District - Land Preservation Fund



There's a renewed interest in rediscovering what we love about Oceana – our abundant and beautiful natural resources. The District recently received two gifts of land - the Otto Nature Preserve and the Stony Creek Nature Preserve. The Fund will support additional property acquisition and development. With the first fundraising goal of \$100,000 met, the District continues to prepare for future needs.

Gifts & Pledges Raised: \$119,000 • Total Campaign: \$100,000



Equipping the Pentwater Artisan Learning Center for the Next 20 Years

First established in 2002, the Pentwater Artisan Learning Center launched the Equipping the Pentwater Artisan Learning Center for the Next 20 Years Fund to support its continued growth over the next two decades. It is an investment in future artisans, as it will support replacement of outdated, nonworking, unsafe or unrepairable tools and equipment.

Gifts & Pledges raised: \$175,000

Total Campaign: \$250,000



Pentwater-Hart Trail Maintenance Fund

The Pentwater-Hart Trail Capital Campaign Committee aims to connect Oceana County's legendary Hart-Montague rail trail to Pentwater through a \$4.2 million campaign. With several state grants earned and major grants in submission phase, progress is steady. The Trail Maintenance Fund will be used towards meeting state grant requirements and for repairs and maintenance into perpetuity once the Trail is built.

Gifts & Pledges raised: \$126,500

Total Campaign: \$150,000



Pentwater Historical Society Building Expansion Fund

The Pentwater Historical Society acquired & renovated its permanent historic museum home, a former Baptist church, in 2012. The Society is actively campaigning to raise the needed funds to creatively double the exhibit space by 1,500 square feet, add indoor/outdoor event and meeting space, and improve the research facility.

Gifts & Pledges raised: \$707,000 • Total Campaign: \$1.5 Million

Shelby Township Community Park Fund

On the heels of the opening of the 35-acre, \$5.2 million Shelby Township Community Park in August, the Township received a \$2.5 million State of MI Community Enhancement Grant, to be matched by a private donor, to build an indoor sports complex on the same site. The indoor facility is in the design phase, but will include basketball & volleyball courts, indoor soccer field, space for multi-sports (football, wrestling etc) and more to be determined by community input.

Gifts & Pledges raised: \$5.3 Million • Total Campaign: \$7.0 Million



Getty Park Renovation Fund

Getty Park has been a staple of downtown Shelby since its donation from the Getty family in 1908. The Getty Park Renovation Fund was created by the Shelby Optimist Club to capture the local matches needed for several State of Michigan grants received by the Village of Shelby. These grants added some exciting amenities to the design, including a splash pad, pavilion with fireplace and new playground equipment. With the fully upgraded park scheduled to open in 2025, the fund has raised \$141,000 to support match requirements and has a small funding gap.

Remaining Funding Gap: \$69,000

Total Campaign: \$2.1 Million



Oceana County Fair Grandstand & Fairgrounds Renovation Fund

The Oceana County Fair is the longest running fair in Michigan and the grandstands were re-built in 1915. The campaign fund was originally established to upgrade the fairgrounds with modern electrical and to renovate and structurally upgrade the grandstands, while improving ADA-accessibility. With those and many other upgrades completed on the grounds, the most urgent need is a modern restroom and bath house facility to support fair activities and event camping.

Gifts & Pledges raised: \$11,000 • Total Campaign: \$125,000

INVESTING *in Partnership*

NEW FUNDS



**Michigan
Technological
University**

David A. Nobles & Elmo S. Nobles MTU Scholarship

The impact of a beloved grandparent can change a child's life. For David Nobles, Elmo buoyed his grandson's educational growth and college attendance. David relocated to his grandfather's native Oceana County as he and his late wife Jeannette established roots in New Era in 2002. David established the David A. Nobles & Elmo S. Nobles MTU Scholarship to honor Elmo's impact on himself, supporting the next generation's attendance at Michigan Technological University. The scholarship will support any Oceana student studying science, technology, engineering, or business administration.

Shelby High School Ride with Pride Fund

Inspired by other area schools, Shelby High School is launching its own Ride with Pride to encourage teens to make positive behaviors in and out of school. The Shelby High School Ride with Pride Fund will support rewards for students adhering to the program's positive habits, including an end-of-year lottery of a car for eligible participants. The creation of the fund will allow for the program's longevity, creating a lasting incentive for students' participation. At the same time, the teens will establish healthy practices like avoiding drugs and alcohol, and behavioral issues.



For the Love of Pentwater - Carol Oxford "Mrs. O" Fund

Before moving to the lakeshore in 1994, Carol and Raymond Oxford would visit Pentwater on weekends. Carol became a geriatrics nurse for several decades, later transitioning to cosmetology. Carol's transition from healthcare to hairstyling represents her love of learning and fellowship, which garnered her many friends in Pentwater. Carol treasured summers in Pentwater, enjoying music on the green and visiting friends and family. In her memory, Carol's family and friends established the For the Love of Pentwater - Carol Oxford "Mrs. O" Fund to support programs & projects in Pentwater.

More New Funds continued on next page.



Shirley L. Oles Educational Scholarship

John and Beatrice Gebhart raised their children alongside their thriving business, Golden Hart Fruit Farms. Their daughter, Shirley, would carry on the legacy of their family's farm with her husband of fifty-five years, Bob Oles. After earning her education degree, Shirley began her forty-year career in Walkerville and then Hart as a much-beloved home-economics teacher. Bob established the Shirley L. Oles Educational Scholarship to preserve Shirley's memory as a truly influential educator, supporting graduates of Hart and Walkerville.

Chuck Schultz Public Safety Scholarship

After passing in 2022, Sergeant Roger "Chuck" Schultz, Jr.'s family & many loyal friends established the Chuck Schultz Public Safety Scholarship to uplift the next generation of public safety professionals. Over his thirty-two-year career, Sgt. Schultz served as part of the Shelby, New Era, and Rothbury Police Departments and the Oceana County Sheriff's Office. He was always available to lend a helping hand to anyone in need. Sgt. Schultz's dedication to public safety was derived from his profound love for his family, recognizing each resident of Oceana County as someone's loved one.



Clifford & Ellen Prince Fund

Clifford and Ellen Prince spent over 55 years in New Era before their passing in 2023. They pre-planned & funded their charitable legacy through the use of a Charitable Remainder Trust to support Christian education across West Michigan. Clifford and Ellen were dedicated members of the New Era Christian Reformed Church and advocates of religious education. Clifford, a long-time local attorney, served on the board of directors for the National Union of Christian Schools and the Calvin College Alumni Association. Ellen taught at New Era Christian School and joined the Western Michigan Christian High School Board.

INVESTING *in Partnership*

NEW FUNDS



Patrick "Rick" Aerts Band & Music Therapy Fund

After graduating from Ferris State University, Rick Aerts rejoined his family in his hometown of Hart. He shared his talent for the trombone as a part of the Scottville Clown Band, the Pentwater Civic Band, and the West Shore Community College Brass Ensemble. The Patrick "Rick" Aerts Band & Music Therapy Fund will help student-musicians to attend area camps, provide new instruments and equipment to Oceana County bands, and support other community music needs.

Bobier Family Stewardship Fund

Bill and Patrice Bobier established Earthscape Farms on 40 acres of land in Hesperia in 1971, growing it into a large multi-generational organic agricultural business. The couple shares their love of holistic wellbeing throughout West Michigan, by selling produce & beef at Sweetwater Market in Muskegon. Patrice supports families as a well-respected midwife, while Bill is a former policymaker best known for supporting sustainable forestry and environmental management. Bill also served as a Foundation trustee in the early 2000's. Bill and Patrice made an immediate first grant to support the Oceana Conservation District's Land Preservation Fund.



Flora, Fauna & Friends Fund

An anonymous donor established the Flora, Fauna & Friends Fund to embody their humility and personality. The Fund supports the donor's interests in peace, land conservancy, animals and the greatest needs of Oceana County. By establishing the Flora, Fauna & Friends Fund, this thoughtful donor will make a philanthropic impact during and after their life, as they grow the fund through donations and a bequest.



Thomas Clair Fund for Young Musicians

Tom's long-time friend Stuart Laing and his family promised to establish this Fund to capture his love of music and to support aspiring musicians. He was a passionate enthusiast of the Hart Performing Arts Series and the program's ongoing exposure of world class talent to Oceana County students. The Thomas Clair Fund for Young Musicians will give scholarships to Oceana student musicians attending a fine arts camp and support local schools purchasing new instruments. Thomas was a graduate of Pentwater High School and retired to Ludington with his wife, Joan.



Bouchard-Esmark Fund

Within his forty-year career, James Bouchard established several successful businesses, most notably Esmark, a privately held steel, tin, oil, and gas production corporation. Now retired, James and wife Heisa enjoy splitting their time between their summer home in Pentwater and Harbor Bluffs, FL. Originally from Cuba, Heisa's philanthropic passions lie in uplifting Latino communities and youth, while James is interested youth development and the future of Pentwater. Heisa, James, and Esmark are active philanthropists, having donated over \$10 million dollars to US and International charities, and are eager to give back to Oceana County and celebrate their business success.



Gene Davidson Engineering & Skilled Trades Scholarship

Traces of Gene Davidson's renowned metal and woodwork installations can be found throughout Pentwater, whether it be the massive map of Michigan at the Pentwater Artisan Center, the handcrafted canoes hanging in the Pentwater Yacht Club, or the Foundation's Legacy Society display. Gene and wife Barbara established the Pentwater Artisan Learning Center as a haven for artists to gather and learn, regardless of experience or skill. Barbara and members of the Learning Center established the Gene Davidson Engineering & Skilled Trades Scholarship after his passing to support Oceana students pursuing a skilled trade or engineering degree or certification.



Mrs. Kronlein Reading Fund

When fourth grader Rob Barefoot's teacher introduced him to the magic of books, the experience instilled his passion for reading. In addition to serving as a school librarian, his teacher, Mrs. Judy Kronlein, taught in Hart Public Schools for several decades. Rob

established the Mrs. Kronlein Reading Fund in 2021 through the Build a Fund program and it reached full funding in 2024, partially through matched gifts from his employer, Microsoft. Rob is also a frequent volunteer for the Foundation's early literacy program, Read Early. Read Often., happily giving away books, literacy materials & advocating at the New Era Farmer's Market and the Oceana County Fair.

Hart Congregational United Church of Christ Fund

The historic Hart Congregational United Church of Christ celebrated its last worship gathering in late 2023. The church recognized its 155-yearlong fellowship by establishing the Hart Congregational United Church of Christ Fund in honor of its generational impact on Hart. The Fund will provide annual grants in perpetuity to ten local nonprofits and their Conference - including Oceana County Medical Care & Cherry Blossom resident activities, COVE, The Ladder, Crystal Valley Care Fund, Mason-Oceana County Jail Ministry, Love INC, Toys 4 Tots Oceana drive and the Foundation's Migrant Farmworkers and Child Task Force annual drive.



Mrs. Mullen's Closet - Benzie

While Benzie and Oceana Counties are miles apart, they share a hero: Dyanne Mullen. Dyanne secretly bought clothes and school supplies for students in need, first as a teacher and then as principal at Spitler Elementary School. After her passing in 2010, Dyanne's husband, Mark, and

friends established the Mrs. Mullen's Closet Fund to support Oceana students' success through accessible programming and resources. In 2024, Mrs. Mullen's Closet Fund - Benzie was transferred into the Oceana Foundation to continue supporting children's needs in Benzie, the family's seasonal home. Each Mrs. Mullen's Closet Fund will shape young lives in both of Dyanne's loved communities.

McIntyre Whitehead Family Fund

Grand Rapids-based entrepreneurs John and Betsy McIntyre established the McIntyre Whitehead Family Fund as an important tribute to Betsy's late sister, Susan Whitehead. She was a longtime resident of Pentwater, New Era and Willowbrook Adult Foster Care before passing away in 2014. Their establishment of an Oceana County-based donor-advised fund will allow for investments in Susan's memory in their community. The couple and their daughter, Molly Chelovich, are well-known philanthropists in Kent County & elsewhere, partly through the generosity of their company, Anderson Group of Companies.

Full Circle Midwifery Scholarship Fund

For expecting mothers, the care of a trusted midwife can be invaluable. Patrice Bobier knows this better than most as a mother, grandmother, and certified midwife who has assisted in thousands of births. She established the Full Circle Midwifery Scholarship Fund to support students working on a degree or certification towards becoming a licensed midwife in Michigan. With three current students, Patrice has also been the primary preceptor for four currently licensed midwives and has assisted in training three other licensed midwives.



Ladder Community Center Fund

The Ladder Community Center became part of the heart of downtown Shelby when it opened in 2016.

Dave and Kim Beckman transformed an auto repair shop into a Christ-based community center, serving youth and seniors. The Ladder uplifts families, children, and older adults through its combination of community and faith. The Ladder continues to grow each year, inspiring the creation of the Ladder Community Center Fund to provide annual operational grants towards sustainability and growth.

INVESTORS

UNRESTRICTED

Robert & Rose Haase Fund
Julie & John Stivers Fund
Community Investment Fund

DONOR ADVISED

Dave & Kim Beckman Family Fund
Bob & Wilma Beckman Love Your Neighbor Fund
Bluhm-Lockwood Memorial Fund
Bobier Family Stewardship Fund
Bouchard-Esmark Fund
Robin Bradley Memorial Fund
Jessica Lauren Bruce Fund for Bipolar Research
Cancer and Critical Care Fund
Carnes Family for Music Arts Camp Fund
Claycomb Family Memorial Fund
Elaine & Lee Curtis Fund
Electric Forest Charitable Fund
Wayne Elhart Be Nice Memorial Fund - Oceana
Henry & Dorothy V. Fischer Family Fund
Marge & Doug Gregg Fund
Happy Farmers Art of Living Fund
William Field Hart-Montague Trail Fund
Flora, Fauna & Friends Fund
Todd & Kellie Fox Family Fund
Jim Frank Memorial Fund
Hart Rotary Club Fund
Curtiss & Elizabeth Helgren Charitable Fund
Dr. James R. Hines Shelby Community Improvement Rotary Club Fund
Kimmel Family Fund
Edward and Evelyn Kolbe Fund
Mrs. Kronlein Reading Fund
LaBarge-Beeber Family Fund
Lake-Osceola State Bank Fund
William R. Lathers Foundation
David P. Markiewicz Memorial Fund
McIntyre Whitehead Family Fund
Gerald and Florence Meyers Fund
Miller Charitable Fund
Dan and Laura Muirhead Fund
Mrs. Mullen's Closet Fund - Oceana
Mrs. Mullen's Closet Fund - Benzie
Nobles Family Fund
Col. Joe & Rilla Nameth Fund
Neighbor to Neighbor Fund
Friends of Oceana County Sheriff Office Fund
Ordoobadi Family Fund
Gail Paulus Family Fund
Pentwater Service Club Fund
Peterson-Carey Family Fund
Gary & Mary Ann Peterson "Grandma & Grandpa Pete" Memorial Fund
Peterson Farms Fund
Raffaelli Family Fund
Ralph's Kids Fund
Mary R. Sanford Memorial Fund
Allan E. & Betty J. Seyfred Family Fund
Paul & Ann Schmiedeknecht Camp Fund
Shelby Optimists Club Fund
Shelby Rotary Club Fund
Shelby State Bank Fund
SLSD Jeep Invasion Fund
Sobecki Family Memorial Fund
Zack Snider Agricultural Memorial Fund
Sparks/Ryan Memorial Fund
Patrick Steen Helping Hand Fund
Mark and Jan Trommater Family Fund
James H. and Ann M. VanTassel II Family Fund
Randall and Linda Wagner Family Fund
Richard & Ryan Walsworth Memorial Fund
Warren G. White Memorial Fund
Wilson Family Little Point Sable Fund
Malcolm "Pete" Wood Memorial Fund

DESIGNATED

Thomas Clair Fund for Young Musicians
Crystal Valley Care Fund
James J. Farkas St. John's Catholic Church Cemetery Maintenance Fund
George Wilber and Edna Hansen Endowment Fund
Hart Congregational United Church of Christ Fund
Betty L. Johnston Family Fund
William R. Lathers Golden Township Fund
William W. Moyer Flower Creek Cemetery Fund
William W. Moyer Oceana County Historical & Genealogical Society Fund
Oceana County Historical and Genealogical Society Museum Trust Fund
Robert J. Olendorf Memorial Fund
Pentwater Red Barn Preservation Fund
Roy's Kids Fund
Shelby Area District Library - Paul and Katherine "Kate" Lound Fund
Clifford & Ellen Prince Fund
Trinity Lutheran Community Food Pantry Connie E. Bailey Memorial Fund
John and Kay Vrbanac Fund

AGENCY

COVE Oceana Endowment Fund
Gene and Barb Davidson Pentwater Artisan Learning Center Fund
Elbridge Community Church Endowment Fund
Fountain Hill Center Lakeshore Office Fund
Habitat for Humanity - Oceana County Fund
Hart Area Public Library Fund
Hart Community Performing Arts Association Fund
Hesperia Community Library Endowment Fund
Oceana Hispanic Center Fund
Ladder Community Center Fund
Lakeshore Community Hospital Endowment Fund
LASSI Fund
Love INC of Oceana County Fund
New Era Christian School
Educational Support Services Fund
New Era Christian School Endowment Fund
Oceana County Council on Aging
Oceana County Historical & Genealogical Society
Oceana County Medical Care Facility Fund
Oceana Christian School Education Fund
OCEANA'S HOME Partnership/Channel Housing Ministries Fund
Pentwater Township Library Fund
Pentwater Historical Society Fund
Shelby Area District Library-Caroline "Kelly" Hansen Morse Memorial Fund
St. Michael School, Brunswick, Education Fund
Trinity Lutheran Church Endowment Fund
United Way of the Lakeshore Oceana County Fund

FIELD OF INTEREST

Patrick "Rick" Aerts Band & Music Therapy Fund
Little Point Sable - Arts for Oceana County Fund
Child Neglect and Abuse Prevention Fund
Janie Denman Women & Girls Fund
Joe Foster Junior Golf Fund
Bessie E. & Ethan Allen Gray Health Fund
Harbor House of Hart Women & Girls Legacy Fund
R.P. & M.J. Henry Family Fund
Homeless Prevention Endowment Fund
Eugene Kuhne Fund
Oceana College Access Sustainability Fund
Oceana County Parks & Trails Fund
Oceana Youth Fund
Urgent Needs Fund

OPERATING

Administrative Fund
Operating Fund

SCHOLARSHIP

Clancy Aerts Skilled Trades & Healthcare Scholarship
 Oceana Aviators Scholarship
 Steve Boutell Memorial Scholarship
 Sharon Bowen Memorial Scholarship
 Boy Scout Camp Scholarship
 Robin Bradley Memorial Scholarship
 John Bush III Memorial Scholarship
 Elaine & Lee Curtis Scholarship
 Gene Davidson Engineering & Skilled Trades Scholarship
 Emily Dykstra & Aunt Catherine Lound Scholarship
 Complete Your Degree Program
 Jordan Evans Memorial Scholarship
 Ruth & Frans Feuerstein Scholarship
 Melissa S. Fralic Scholarship
 Full Circle Midwifery Scholarship
 Robert J. Gebhart Memorial Scholarship
 Gerald "Bud" & Judy Greiner Agricultural Scholarship
 Hager-Lacey Memorial Scholarship
 Collin Hansen Skilled Trades Scholarship
 Hart Public Schools Foundation Scholarship
 Hart Rotary Club Scholarship
 Hart Lions Memorial Scholarship
 Hart Public Schools Robert E. Diman Scholarship
 Helen Hutt Scholarship
 Edwin Johnson Memorial Scholarship
 Kirk Music & Education
 Michael W. Malburg Sr. Memorial Scholarship
 Gerald L. Malburg Scholarship
 Oceana/Mason MSU Alumni Scholarship
 Clarence Metzler Memorial Hart Band Scholarship
 David A. Nobles & Elmo S. Nobles MTU Scholarship
 Shirley L. Oles Educational Scholarship
 Ruth Jean Oomen Nursing Scholarship
 Parrington/Heyde Scholarship
 Dean Patrick Scholarship
 Pentwater Public Schools
 Ryan Scott Prudhomme Memorial Scholarship
 Terry & Pam Roach Cancer Survivor Scholarship
 Lucas Rosalez Memorial Scholarship

Joan & David Roseman Medical Scholarship
 Little Point Sable Barry Ross Scholarship
 Christopher Schaner Memorial Scholarship
 Thomas Schaner Memorial Scholarship
 Shelby Public Schools Foundation Scholarship
 Shelby Rotary Club Scholarship
 Shelby Area Chamber of Commerce Scholarship
 Mereta Ann Spitler Scholarship
 Seth J. Spitler & Margaret Schaner Spitler Scholarship
 Bert Stevens Memorial Scholarship
 Richard and Carole Tompkins Scholarship
 Lisa Veltman Scholarship
 Larry Wagner Appletree Automotive Skilled Trades Scholarship
 Walkerville Public Schools
 Joseph P. Warmbier Scholarship
 Janet A. Wessel Scholarship
 US Marine Brett Witteveen Memorial Scholarship

COMMUNITY PROJECT

Capacity Building Fund
 Equipping the Pentwater Artisan Learning Center for the Next 20 Years
 Getty Park Renovation Fund
 Oceana CAN! Operating Fund
 Oceana Conservation District Land Preservation Fund
 Oceana County Fair
 Grandstand & Fairgrounds Renovation Fund
 Oceana Read Early, Read Often Fund
 Pentwater Beautification Fund
 Protect Pentwater Harbor Campaign Services Fund
 Pentwater-Hart Trail Fund
 Pentwater Historical Society Building Expansion Fund
 Shelby High School Ride with Pride Fund
 Shelby Township Community Park Fund

BUILD A FUND

Lake Michigan Camp Harvey Weaver Preservation Fund
 Tom & Jill Oomen Family Agricultural & Skilled Trades Scholarship
 Colleen Plummer Acts of Kindness Fund
 Chuck Schultz Public Safety Scholarship
 For the Love of Pentwater - Carol Oxford "Mrs. O" Fund

BALANCE SHEET

ASSETS	2023	2022
Cash and cash equivalents	\$1,120,458	\$1,884,843
Investments	\$17,672,794	\$14,844,247
Property & Equipment, net	\$1,342	\$4,146
Total Assets	\$18,794,594	\$16,693,236
LIABILITIES		
Accrued expenses	\$9,733	\$8,072
Funds held as agency funds	\$559,625	\$494,981
Total Liabilities	\$569,358	\$503,053
NET ASSETS		
Total Net Assets	\$18,225,236	\$16,190,183
Total Liabilities & Net Assets	\$18,794,594	\$16,693,236

STATEMENT OF ACTIVITIES

PUBLIC SUPPORT & REVENUES	2023	2022
Contributions of financial assets	\$2,574,715	\$2,496,750
Net investment and other income	\$2,273,434	(\$2,735,151)
Total Public Support & Revenues	\$4,848,149	(\$238,401)
EXPENSES		
Program services	\$2,547,622	\$909,297
Operating	\$265,474	\$248,136
Total Expenses	\$2,813,474	\$1,157,433
CHANGE IN NET ASSETS		
Net Assets, January 1	\$16,190,183	\$17,586,017
Net Assets, December 31	\$18,225,236	\$16,190,183

Statement of Financial Position

for year ended
December 31, 2023

Vanguard Institutional Advisory Services,
Investment Managers

Dennis, Gartland & Niergarth,
Auditor

The portfolio experienced a
market gain of 16.84% in 2023.

COMMUNITY FOUNDATION FOR OCEANA COUNTY

PO Box 902, 388 S Hancock St.

Pentwater, MI 49449



INVESTING *in Oceana County* Now and in the future with your legacy gift

An investment in the Oceana Community Foundation is a meaningful way to leave a lasting legacy that will benefit generations. It's no surprise that many members of the Foundation's Legacy Society, which recognizes those who have named the Foundation as the beneficiary of any type of planned or deferred gift, are well-known now for their active community spirit, serving as volunteers, teachers, public officials and many other roles as civic leaders.

One of the sweetest stories of these treasured Oceana County benefactors began in 2019, when Dorothy Fischer met with Foundation Director Tammy Carey about establishing a fund – at age 99!

Dorothy was very active in the Oceana community over the years, including serving as a township treasurer and working with others to start the Asparagus Festival. She was active in the Oceana Historical Society, Grange, Farm Bureau, 4-H and was a champion pie baker. With her husband, she ran Fischer Trees, a favorite for holiday tree-shopping. She also was on a committee that planned and carried out international cross-cultural



programs. She traveled the world and, as a square dancer for over 60 years, danced on the Great Wall of China and in a giant beer keg in Germany.

Born just before women won the right to vote, she was featured in *We the Resilient*, a web site and book honoring that generation on the occasion of the first woman running for the office of U.S. President.

At the Foundation's 2019 annual Fundholders & Legacy Society reception, Dorothy was honored as our newest Fundholder. The event was held at a former working barn that was moved and restored as part of Heritage Wedding Barns near the lakeshore, moved from Dorothy's family's farm in Rothbury.

Dorothy died just a year after establishing the Glen & Dorothy V. Fischer Family Fund but was able to meet with the Foundation for a first round of grant-making before she passed. "She loved it," remembers Carey "And her daughter Diane and granddaughter Amy are continuing the family legacy of philanthropy." When reflecting on why she established the fund, Dorothy Fischer said "I'm interested in so many things and felt it was time to give back." May we all share in Dorothy's resilience, joy in life and her commitment to her community.

WILL YOU INVEST *in the future of Oceana County?*

Join our Legacy Society Leaving a gift to the Foundation can be as easy as adding us to your will or trust. Some folks choose a specific amount, while others leave a percentage of what's left after taking care of their loved ones. You can even name the Foundation as the beneficiary of your 401K, IRA, or insurance policy! However you choose to give, you'll be welcomed into our Society.