20 Stories for 2020
Our Vision
Kalamazoo County is the most equitable place to live.

Our Mission
Remove barriers through building relationships and connecting resources so people can reach full potential.

Our 20 for 2020
This has been an extraordinary year for our community. The stories in this report highlight our top 20 collaborations, projects, and innovations made possible by the determination and dedication of our staff, our partners and members of the Kalamazoo County community.

Give

donate online
kalfound.org/give-now

mail a check
Kalamazoo Community Foundation
402 East Michigan Avenue
Kalamazoo, MI 49007-3888

arrange a planned gift
There are many ways for you to plan now for a gift later. Get in touch with our Donor Relations team at donorrelations@kalfound.org or 269.381.4416 to learn more.

Support

what we fund
We provide grant support to 501(c)(3) nonprofit organizations for work that aligns with our community investment priorities and will benefit residents of Kalamazoo County.

We also provide scholarships for education beyond high school for Kalamazoo-area students.

learn more
kalfound.org/grants

Connect

269.381.4416 | kalfound.org

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Cindy Trout
Frances Vicioso

KZCF committee and team members are listed on the inside back cover.
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You’ve read our Annual Report. Learn what you can do next.
Reflections from KZCF Leadership & Board of Trustees

In the spirit of living into our values of shared collective leadership, we are including the voices of both KZCF’s Strategy & Leadership Team and Board of Trustees as part of this Q & A reflection on 2020 and our hopes for the future. Previously, our Annual Reports captured past year’s reflections of the President/CEO and Board Chair. However, there were so many rich reflections from our diverse leadership that we included it in this report. We hope you enjoy these musings!

What is the role of a community foundation during times of disaster?

Frank Sardone: KZCF has a long history of partnerships, and the past year has been no exception. In times of disaster, the foundation immediately partners with other organizations to quickly provide aid where it is most needed. KZCF continually evaluates the needs of our communities, with a focus on addressing root causes and systemic issues.

What could KZCF have done better during this crisis?

Sarah Lee: The biggest challenge when it comes to constantly innovating and adapting is how we center community input, especially Black, Indigenous, People Of Color (BIPOC) communities. Access to information and decision-making tables vary based on an individual’s socio-economic situation and we are constantly seeking ways on how we meet community where they are. Our commitment to innovation and learning is critical to ensuring we’re growing alongside with community.

What was at the top of your mind as a community leader during this difficult moment in time for our community, nation and world?

Joanna Dales: New information was coming in every day and there was so much unknown, especially in the beginning. Lots of fear and worry. How do we adapt our work so we can support the community in a time of great need and ensure a safe place (and pace!) for employees?

Elena Mireles-Hill: We have significant responsibility as a community entity with such extensive resources, influence, and power to be a bold and courageous leader – especially as it relates to racial and social injustice. We had been on this journey before the heaviness of the pandemic and the civil unrest over the last year. If we would not take a stand in this time against injustice and oppression, when?

What events or stories in 2020 made you proud of the community and/or the work happening at KZCF?

Carrie Pickett-Erway: I had a call with a donor family about the needs in the community. They were so concerned about youth and learning loss during the pandemic. They were compassionate and really interested in learning about how their giving could be align with our focus on equity. It showed me that donors see the importance of an equity approach in philanthropy. KZCF can be a great vehicle for this kind of synergy.

Answers to this question continues on page 5
Hon. Carolyn Williams: Based on what we know about the impact of systemic racism on the economic status of people of color – especially African Americans in Kalamazoo County as well as the Latinx population – it is important to leverage foundation resources to partner with nonprofits working to level the playing field.

Mary Harper: We try to approach everything with an equitable lens. When we focus on equity we move toward our goal where unfair barriers are erased.

Jorge Gonzalez: If you have a group in society that is not able to live up to their potential, the community doesn’t live up to its potential. If you work hard to make sure that everybody can shine, the community is going to be stronger.

What are your hopes for KZCF’s work in 2021?

Von Washington, Jr.: We will continue to look for ways to educate ourselves and others on why anti-racism work is imperative for community transformation.

Amy Upjohn: My hope is that the work of the Anti-Racism Transformation Team (ARTT) continues to strengthen the Community Foundation in equity and inclusion from within so that we can lead by example. I want us to be able to bring others along who are not yet on the journey and don’t understand. My hope is that through philanthropy, the Kalamazoo community can see that we are better together and stronger if we are all equal.

Si Johnson: The success of the Community Urgent Relief Fund demonstrated the generous spirit of our community, the depth of relationships that KZCF has and the power of collaboration, in addition to the continued work towards racial justice.

Sydney Parfet: I am proud to be a part of the Community Foundation which has made it its goal to call out the need for diversity, equity and inclusion and works every day to support and incorporate its values into the community and the organizations it supports. I am sad at the loss our community, country and world experienced in 2020. We have a lot of learning to do from this experience and a lot of growth and healing.

Erycka Hunter: I joined the KZCF team in the last few months of 2020. I was committed to learning during an extraordinarily turbulent time for our community and team. What I’ve learned is that KZCF is comprised of people who care deeply and are passionate about their work. I’m proud of my colleagues and excited to foster an internal culture that pours into each of them.

How did equity, inclusion and anti-racism show up in how KZCF addressed challenges this year? Why is this important in philanthropy?

Sarah Lee: Equity, inclusion and anti-racism is a non-negotiable in our work. It is a demonstration of being seen, heard and honored for who you are, your dreams and hopes, and your contributions to this community. I can’t imagine doing the work of philanthropy without these three core tenets.
2. Activating for urgent relief

March 2020 marked the second time KZCF and the United Way of the Battle Creek and Kalamazoo Region (UWBCKR) jointly activated crisis funds. The collaboration with another regional funder allowed a more comprehensive response to the gaps in key services for Kalamazoo County’s most vulnerable community members.

The KZCF and UWBCKR grantmaking teams met 2 to 3 times each week to evaluate and make joint decisions on hundreds of applications for crisis grants. Funding priorities were developed using a deep understanding of community along with vital input from agencies on the ground. Grantmaking in Phase I focused dollars on direct service needs, critical nonprofit operations and infrastructure and costs associated with additional volunteer capacity as needed in this time of crisis. Phase II prioritized access to safe and quality shelter, food, utilities and transportation; access to mental health supports and personal protective equipment; education access; and supporting to families and victims impacted by gun violence. Read more about our response to community gun violence on page six.

The community contributed more than $2.4 million in support of crisis relief funds. As a result, over $2 million in grants were awarded during Phase I. Phase II crisis grantmaking began in November 2020. As of May 2021, 59 grants totaling $1.8 million have been distributed to the community in this Phase. The urgency with which KZCF responded to the pandemic led to reflection on how philanthropy determines which issues are “urgent.” In an article for Nonprofit Quarterly, KZCF Community Investment Officer Kururama Masomere wrote about why philanthropy must continue to move with urgency even after this pandemic ends.

3. Adapting our grantmaking

On the morning of March 13, 2020, the KZCF grantmaking team began hearing from nonprofit partners. They were anticipating significant gaps in resources for immediate and emerging community needs. There was anxiety over increased costs for providing services and a deep concern for keeping frontline staff and volunteers safe while administering services.

KZCF’s Community Investment team recognized that partners were working diligently to ensure the well-being of their staff and the community members they support. They began working internally to modify and expedite the grantmaking process to be responsive to partner agency needs and provide stable operating support. To address limited capacity, KZCF supported partners using grant dollars received previously from KZCF for the greatest needs in their organization. Partners were trusted to make the best judgment in addressing the community’s most pressing needs.

As the nation went into crisis mode, KZCF Community Investment team also suspended requests to grantees to submit final grant reports to the Community Foundation. Intermittent and final report deadlines were also put on hold. To better understand partner needs, the team made proactive outreach to partners and connected them to resources wherever possible. Recognizing the disparate impact of the pandemic on the Black community and other people of color, efforts were made to prioritize supports for communities of color.

When the Community Urgent Relief Fund was activated, the goal was to be as nimble as possible. No request from partners was too small and there was no cap on requests. The abbreviated, joint grant application between KZCF and United Way, in addition to the teams collaborating to review requests, streamlined the process for nonprofits and moved resources quickly.
To ensure an efficient and effective community response to the pandemic, Kalamazoo Community Foundation joined the Kalamazoo County Response Consortium (KCRC), a collaboration of nonprofits, government agencies and local businesses organized by Gryphon Place.

KZCF joined weekly KCRC convenings to gather information and utilize learnings to determine the community’s most pressing needs.

The first call for the COVID-19 response brought together 91 participants with a variety of nonprofits, sectors and organizations represented.

The calls allowed the full nonprofit sector to collaborate, problem solve, and collectively identify needs as they emerged. Assessing the needs of community agencies and presenting information on how organizations can access support from the United Way Disaster Relief Fund, the KZCF Urgent Relief Fund, Gryphon Place, and the KCRC were an important part of the call.

Following local shootings in August 2020, Truth, Racial Healing & Transformation Kalamazoo (TRHT) held a TRutH Talk on gun violence with Ed Genesis, artist, organizer and TRHT Racial Healing Team Lead; Gwendolyn Hooker, CEO of H.O.P.E thru Navigation and member of the TRHT Law Design Team; Tami Rey, co-chair for ISAAC’s gun violence Task Force; Orlando Little, advocate leader in the Northside neighborhood of Kalamazoo and Greater Kalamazoo area; and Ed Genesis’s son, who provided an important youth perspective on the issue.

The conversation was one of the most watched TRutH Talks of 2020. The conversation received over 4,000 views on Facebook, was shared more than 30 times, and garnered 148 reactions and 94 comments.
Creative and collective giving

When KZCF activated its Community Urgent Relief Fund (CURF) to support nonprofits during the pandemic, gifts poured in from those eager to support their community in creative, collective ways.

The Richard Tomlinson Family Fund, now advised by Richard’s wife, Kathie, and three sons, Bill, Steve and Charlie, initiated a match challenge to help KZCF raise more money for families and individuals impacted by COVID-19. The Tomlinsons agreed to match gifts to the CURF up to $15,000. In under one week, KZCF met the $15,000 match.

Community members like Stuart and Karen Eddy and Jeff Mitchell signed over their stimulus checks to the Community Urgent Relief Fund.

“I wanted to donate the money to an organization who would get it to those most in need in our area and for a variety of conditions,” Mitchell said.

“When COVID-19 emerged and the stimulus checks became a reality we wanted to do something with the check we received that would be helpful,” said Stuart Eddy. “The obvious answer was to look to the Kalamazoo Community Foundation for a fund where we could donate the money. The Urgent Relief Fund was the perfect answer.”

Collective efforts inspired others to give passionately. Feed the Fight (FTF) Kalamazoo was founded to purchase meals from local restaurants and deliver them to healthcare workers and first responders. The purchases supported local restaurants while providing meals and a morale boost to those on the front lines. Jodi Michaels, a founder of FTF Kalamazoo, reached out to KZCF for support.

The KZCF Donor Relations team connected Jodi to a donor interested in supporting local businesses and frontline workers impacted by the pandemic. This led to a $30,000 contribution to FTF.

In addition to larger donations, over 150 first-time donors made gifts of all sizes to the CURF to support their community during a crisis.

Unprecedented grantmaking from donor advisors

Donor Advisors with funds at the Kalamazoo Community Foundation granted more than $2 million to local nonprofits in 2020 compared to the $284,000 granted in 2019.

The collaborative nature of the community foundation made the extraordinary performance in 2020 possible. KZCF fosters long-standing relationships with donor advisors who have a flexible giving vehicle already in place and, like most, care deeply about Kalamazoo County.

Within a few weeks of activating the Community Urgent Relief Fund, donor advisors made more than $1 million in grant suggestions to support KZCF’s COVID-19 relief efforts.

KZCF also made several critical administrative adaptations – most of which were inspired by working remotely. Those adaptations enabled KZCF to move resources into the community more efficiently and effectively.
8. Scholarship expands opportunities for immigrant families

When Christine Walker was 11 years old, she and her Polish family emigrated to the United States from France. Her own emigration story inspired her to establish the Jerry A. and M. Christine Walker Scholarship Fund with immigrant families in mind.

“That, in addition to the current immigration issues, led me to endorse a preference for scholarship awardees from families of immigrants.”

After establishing the scholarship in 2019, Walker worked with her KZCF Donor Relations Officer in 2020 to restructure the scholarship. She created an unrestricted scholarship fund to expand financial assistance to more students. Additionally, Walker chose to make the scholarship renewable as the fund’s spendable increased. She believes everyone should be able to achieve their goals of increased financial independence through education and employment.

“I wanted the scholarship money to be accessible with the fewest number of restrictions,” Walker says.

The first recipient of this reimagined scholarship was Leonel Aguila-Martinez. Inspired by his grandmother, Leonel came to Kalamazoo from El Salvador to pursue a degree in nursing. His grandmother was a nurse and he fell in love with medicine while volunteering with her in El Salvador. Leonel’s scholarship was able to cover his tuition and the leftover funds were used for housing.

“I like the construct of the KZCF scholarship funds where a certain amount of money is reserved for emergencies,” says Walker. “It’s hard to study if you don’t know how you’ll get to the classroom. Or if you don’t have a computer.”

Read more about Leonel’s aspirations and achievements in the Spring 2021 issue of the KZCF UPDATE newsletter.

9. New name, same mission for athletic scholarship

Duane Young’s name and local legacy proceed him. A graduate of Kalamazoo Central High School and Michigan State University, Young’s talent and hard work earned him a career as a professional football player.

Young’s parents established the Duane Young scholarship fund in 1994 to honor their son’s achievements and support the dreams of young athletes. The fund provides assistance to student athletes who have the desire and the skills necessary to participate in athletics while attending a college/university in pursuit of a post-secondary degree.

When his mother, Dorothy Young, passed away in November 2020, Young renamed his scholarship fund in his parents’ honor. Mrs. Young was active within the community and sat on the board of Duane Young Scholarship fund for many years. Though the scholarship has now changed to the Curtis and Dorothy Young Scholarship Fund, it’s mission to support student-athletes is still going strong. The Young Scholarship has awarded 26 Kalamazoo County students totaling nearly $60,000.
10. **Library scholarship honors commitment to diversity**

Amanda Green was a library assistant in Teen Services at the Kalamazoo Public Library for 23 years, providing library resources, programs, and services that meet the unique needs of teens in our community. According to KPL, Green’s “passion and support of KPL’s mission to support and mentor teens has been passed on for years.”

To expand access to people of color interested in becoming librarians, KPL established the Amanda Green Scholarship at KZCF in her honor. The library system hopes to develop and maintain a library team that reflects the diversity of the community, by providing monetary assistance to individuals seeking a master’s degree from an accredited library science program.

The new scholarship opened for applications for the first time early 2021. The first scholarship was awarded to Kalamazoo native Theodore Gill in June 2021.

11. **Diversity, Equity & Inclusion at the leadership table**

After more than 20 years of equity work, KZCF created the first dedicated position to advance Diversity, Equity & Inclusion (DEI) and Anti-Racism standards and practices internally. Elena Mireles-Hill joined KZCF’s Strategy & Leadership team as DEI Director in March 2020 to provide collaboration capacity across the organization and engagement with donors, nonprofit partners and community.

“The current conditions of our community, especially around issues of racism and oppression, implore that institutions like KZCF take seriously our role and influence in advancing the equitable community that Kalamazoo County deserves,” Mireles-Hill says. “We know that we cannot hold our community accountable to that which we aren’t willing to do in our own institution.”

In her role, she is expanding the organization-wide plan for DEI and anti-racism work, supporting the work of the Anti-Racism Transformation Team (ARTT) and leading the planning for DEI training, culture-building, and development for KZCF staff and board members.

“Equity — the redistribution of influence and resources so everyone has what they need to reach full potential — continues to be a key strategy in reimagining a community where zip code, race or identity do not predetermine the life trajectory of our neighbors,” says Carrie Pickett-Erway, president/CEO of KZCF. “While all staff are encouraged to lean into their personal DEI learning, Elena is instrumental in guiding our DEI cohesion as we develop as an organization.”

12. **KZCF thought-leadership at statewide conference**

Kalamazoo Community Foundation staff led important conversations at the Council of Michigan Foundations (CMF) annual conference in October 2020. The conference, themed Building Inclusive Communities, brought together hundreds of industry professionals from across the state.

*Story continues on page 11*
Jordan Duckens and Tom Vance (retired) of KZCF’s Marketing Communications team presented during a panel discussion with other Michigan nonprofit communicators. Duckens shared the team’s insights on challenging how philanthropy tells the stories of People of Color and communities made vulnerable by historical oppression. Carrie Pickett-Erway and members of KZCF’s Anti-Racism Transformation Team led a discussion about the impact of establishing an anti-racism team at KZCF, its influence in shaping processes and policies that correct power imbalances and de-center whiteness as the norm.

Elena Mireles-Hill, KZCF’s Diversity, Equity & Inclusion (DEI) Director, and Donor Relations Manager, Carla Fernández-Soto, organized the first networking session by the new CMF Latinx Affinity Network (LAN). The session highlighted important work of West Michigan Latinx leaders in collaboration with funders such as KZCF to address community needs in the pandemic. This session was an opportunity to elevate the important work of the Mi Gente Fund, only one of two funds serving the Latinx community in the state of Michigan. The LAN group is one of the first statewide affinity group of Latinx professionals in philanthropy in the country.

### Institutionalizing Anti-Racism: Spending policy for unrestricted funds

The pandemic magnified disparities that have long existed: the racial wealth gap, health disparities, pay inequity and a number of other inequalities.

Disparities in outcomes in the community and country are the direct result of current and historical discriminatory practices in the distribution of resources and wealth. In 2020, KZCF began reimagining how resources are distributed to ensure communities that have historically been excluded from policies, practices and systems can live in a community that recognizes and repairs these past harms.

Increasing the spending policy is one powerful step KZCF made toward that change. The change in spending provided an additional $2 million in resources for 2021, increasing the amount available for operations and community investment from $6.6 million to $8.6 million. The policy will be reviewed yearly, however the goal is to have an increased amount available going forward.

The idea for the spending policy review was initiated by the Institutionalizing Antiracism workgroup of the KZCF Anti-Racism Transformation Team (ARTT). A committee of staff, ARTT external community members, and a KZCF board member reviewed the Spending Policy for Unrestricted Funds utilizing an anti-racist lens to identify where there was flexibility to expand the structures for spending. The committee recognized the tension between spending more now versus saving for the future. The team discussed how to honor KZCF’s commitment to immediate action around racial equity and long-term investments in communities of color.

### Affinity Groups create critical space for solidarity and action

Affinity groups are important spaces for convening people who share the same race, age or identity. In 2020, Truth, Racial Healing & Transformation Kalamazoo launched its first Affinity Group Series. The series offering was developed to build relationships, share collective wisdom, and use radical imagination to envision a community that thrives, while creating space to formulate action steps to get there.

The affinity group leads have the flexibility to cover topics and convene in a way that is relevant to their group, but meetings usually include:

- Sharing and learning from one another about personal healing practices;
- Relationship building using Virtual Healing Experiences;
- Analysis building, understanding root causes of issues related to racism and system injustice;
- Relationship building, knowledge sharing, trainings, and collective visioning across affinity group spaces.
Healing continues in new platform

When the pandemic hit, the Truth, Racial Healing & Transformation Kalamazoo team knew they had to reimagine what healing would look like with in-person activity restricted by quarantine and social-distancing mandates. From their imagination, the Virtual Healing Experience project was created. The project served to deepen relationships, share resources, and support community collectively during the crisis.

“Many have recognized this time as an opportunity to do personal, interpersonal and societal healing work” said Sholanna Lewis, former Director of TRHT Kalamazoo. “The moment asks us to reflect on what needs to happen to overcome current challenges and create the future we want to see.”

The project included unique weekly online offerings by local leaders, artists, and healing practitioners, such as discussion spaces on key issues, elevating voices and experiences of local residents; art and performances; physical and mental wellness workshops; poetry, book clubs; reflections and more. Facilitated group spaces were offered for different affinity groups. A webinar series for essential and frontline workers was developed to create an opportunity for empowerment and resilience during an especially challenging time.

The racial healing practitioner cohort created Virtual Healing Experiences, an adaptation of the TRHT trademark Racial Healing Circle experience. TRutH Talks were also a signature program of the Virtual Healing Project. Learn more about TRutH Talks and its impact in the next story.

Through virtual facilitation and livestreamed events, the TRHT team reached more people in community. The adaptations made through the Virtual Healing Experience Project will remain when gathering in-person is not possible.

TRutH Talks create space for community conversation

Since last Spring, the TRHT team has hosted over 40 virtual TRutH Talks featuring intimate conversations with community members that center truth-telling and relationship building. Although the project debuted during National Day of Racial Healing in January of 2020, the project became an essential space for community to process the events of 2020. When issues like police violence, the presidential election aftermath and gun violence dominated our collective consciousness, TRutH Talks held space for the questions, frustrations and conversation.

Community also tuned in to get intimate perspectives on how to build and support strong relationships and coexist with different groups of people. Local leaders and experts answered questions about COVID-19 safety guidelines and vaccines.

One of the unique features of TRutH Talks is the engagement guidelines, also known as the Touchstones. Touchstones are used to create a space that’s courageous and curious. Examples of Touchstones include being willing to challenge assumptions and biases, allow for mistakes, commit to learning, practice deep listening and suspend judgement.

Story continues on page 13
The series consistently drew anywhere from 500 to 3,000 views on Facebook and YouTube, providing a critical platform for subject matter that is most debated, but least understood — like immigration, housing and reparations — to be discussed in a way that builds connection and trust. The most watched talk focused on gun violence in Kalamazoo last summer. The conversation garnered over 4,000 views on Facebook, was shared over 30 times, and garnered 148 reactions and 97 comments.

### Connecting community to therapists of color

Truth, Racial Healing & Transformation Kalamazoo partnered with Rootead Enrichment Center and local community groups to connect residents to therapists of color in order to heal racial trauma.

“Community care is so important now and always,” said Kama Mitchell, Artistic Director and Queen Doula of Rootead. “Representation deeply matters for de-stigmatizing Black and Brown mental health.”

“Cultural mistrust and access to culturally relevant mental health care are two significant factors in the underutilization of mental health services in our community,” said Dr. Kenlana Ferguson, Director of the Kalamazoo College Counseling Center.

“This collective will address these barriers by giving Black and Brown survivors in our community access to Black and Brown clinicians who are slow to pathologize and will instead help them understand the impact of oppression on their thoughts, feelings, and behaviors. These Black and Brown clinicians are among the best in Kalamazoo and the survivors in our community deserve our best.”

The project, hosted by Rootead, is a six-month pilot project created in partnership with Interfaith Strategy for Advocacy & Action in the Community (ISAAC), Urban Alliance, Fire Historical and Cultural Arts Collaborative, Hope thru Navigation, Gryphon Place, and El Concilio. Intentional outreach has been done to families of victims and perpetrators of gun violence; youth of the Fire Arts Collaborative; community advocates and organizers for racial justice; Kalamazoo Valley Community College students and expectant parents.
Making a Statement

In 2020, the KZCF team grappled with how and when to publish statements on social and political issues. We understand our role in community and the implications of lifting our voice, amplifying others’ voices and staying silent.

Last year, KZCF made four statements on standing in solidarity with communities of color, police, and post-election violence. Through trial and error, we learned how important it is to center the voices of those most impacted by the issue at hand; to look for meaningful actions to back up our words; and to understand where we can best use our institutional voice and influence for the greater good of the community.

Lessons Learned: Building teams in a virtual space

KZCF virtually hired and trained four new staff members last year. We learned virtual training required a deeper organization-wide understanding of software and digital tools. Building relationships also proved difficult as the more organic forms of connecting in person were not available. Attempts to recreate these interactions did not always translate online.

Additionally, we learned to be intentional about finding meaningful ways to recognize personal and professional milestones in the lives of our team. It felt more important than ever to celebrate those entering retirement, reaching work anniversaries, earning promotions and welcoming new babies during an extraordinarily difficult year.
## 2020 Combined statement of financial position

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<th>2020</th>
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<td><strong>TOTAL ASSETS</strong></td>
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<td>598,904,597</td>
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<td><strong>LIABILITIES AND NET ASSETS</strong></td>
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<td>Funds held as agency endowments</td>
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<td><strong>TOTAL LIABILITIES AND NET ASSETS</strong></td>
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<td>598,904,597</td>
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### Combined Statement of Activities

**REVENUES**

- Public support: 9,282,647 (2019), 13,657,371 (2020)
- Dividends and interest: 10,264,772 (2019), 11,360,443 (2020)
- Net gain (loss) from investment transactions: 74,617,753 (2019), 38,873,552 (2020)


**EXPENSES**

- Program services: 1,568,612 (2019), 1,600,977 (2020)
- Donor relations and development: 1,462,497 (2019), 1,185,434 (2020)

**TOTAL EXPENSES**: 21,807,845 (2019), 29,162,877 (2020)

**CHANGE IN NET ASSETS**: 73,187,690 (2019), 36,182,011 (2020)

**ENDING NET ASSETS**: 527,783,719 (2019), 563,965,731 (2020)

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Moderate Growth Performance / Endowed Funds report is on page 16. Kalamazoo Community Foundation’s audited financial statements as of December 31, 2020, are available online at kalfound.org/publications.
Moderate growth performance / endowed funds

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<tbody>
<tr>
<td>Moderate Growth</td>
<td>Actual</td>
<td>9.0%</td>
<td>6.3%</td>
<td>9.3%</td>
<td>8.3%</td>
</tr>
<tr>
<td></td>
<td>Benchmark</td>
<td>11.4%</td>
<td>8.0%</td>
<td>10.2%</td>
<td>8.4%</td>
</tr>
<tr>
<td>Socially-Responsible Investment</td>
<td>Actual</td>
<td>15.9%</td>
<td></td>
<td></td>
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</tr>
<tr>
<td></td>
<td>Benchmark</td>
<td>13.3%</td>
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</tr>
</tbody>
</table>

The Moderate Growth Benchmark is a staged index composite benchmark which has the current composition of the Barclays US Aggregate Bond Index (15.0%); Barclays US Treasury 5-10 Yr TR USD (10.0%); DJ US Select REIT index (2.5%); MSCI EAFE Small Cap index (10.0%); MSCI Emerging Markets Value index (10.0%); Russell 1000 Value index (10.0%); Russell 2000 Value index (10.0%); Russell Micro Cap index (5.0%); S&P 500 index (30.0%); and the NCREIF Fund Index ODCE (2.5%). The composition of the benchmark over time is available upon request.

The SRI Benchmark is 70% equity benchmark and 30% fixed income benchmark. The equity benchmark is 75% Standard & Poor’s 1500 Index, 15% MSCI EAFE Index, and 10% MSCI Emerging Markets Index. The fixed income benchmark is the Bloomberg Barclays Intermediate Government/Credit Index.

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Other committees and teams
More than 150 community members also serve on our scholarship committees, TRHT Design Teams, the LGBTQ Equality Fund and Love Where You Live Environment Fund committees.
Actions You Can Take Now | I’ve read the Annual Report. Now what?

10 ACTIONS YOU CAN TAKE AFTER READING OUR ANNUAL REPORT

You can do all 10 or you can do one – but do something!
A small action can help move us closer to our home being the most equitable place to live.

ENGAGE

1. Follow TRHT on Facebook, Twitter and Instagram @TRHTKalamazoo for regular updates on healing and transformation in Kalamazoo County.
2. Follow KZCF on Facebook, Twitter, Instagram and LinkedIn @kalfound for daily updates on community stories, nonprofit impact and what’s happening at your community foundation.
3. Connect with a KZCF Donor Relations Officer to learn how to establish a fund that supports our mission and your philanthropic interests at donorrelations@kalfound.org or 269.381.4416.

LEARN

4. Watch a Truth Talk on the TRHT Facebook or YouTube page.
5. Read how your gifts to the Community Urgent Relief Fund supported Kalamazoo County during the crisis by visiting kalfound.org/Grants/CommunityUrgentReliefFund.
6. Explore our anti-racism and racial equity resource page at kalfound.org/About/Anti-RacismRacialEquityResources.

GIVE

7. Support our mission by making a gift to our Love Where You Live Greatest Needs Fund.
8. Make a gift to the Community Urgent Relief Fund for ongoing relief efforts during the pandemic and future crises.
9. Make a gift to the TRHT Endowment Fund to sustain community healing for generations.

SHARE

10. Share one story from our report with a friend, colleague or family member via text, phone conversation, email or on social media.