

Kalamazoo Community Foundation Guide to Philanthropy



The most trusted philanthropic partner for
every resident of Kalamazoo County.



KALAMAZOO
COMMUNITY
FOUNDATION

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A Welcome from Our President/CEO



On behalf of our wonderful staff and board of trustees, I extend a warm welcome to you! We are so pleased that you are eager to learn more about the incredible work we are doing here at Kalamazoo Community Foundation (KZCF) to make Kalamazoo County a thriving community.

Since 1925, when W.E. Upjohn and Carrie Gilmore Upjohn, gave the first \$1,000 gift to KZCF, we have funneled hundreds of millions of dollars back into our community via our nonprofit partners across Kalamazoo County – partners who work every single day to improve the lives of our community members.

As president/CEO, I have the distinct honor of driving the work that began in 1925 forward to ensure we realize our vision of Kalamazoo County becoming the most equitable place to live. Whether for students who are looking to pursue their education, nonprofits who are providing vital resources to our community members or donors who want to leave a legacy that lasts for generations to come, KZCF is our community foundation.

We look forward to partnering with you as you learn more about the work we do and how you can get involved!

With gratitude,

Dr. Grace Lubwama

President/CEO

Kalamazoo Community Foundation



Creating Individual and Community Transformation *-Together*

Simply put, a community foundation is a type of charitable organization that pools donations from individuals, families and businesses to support charitable initiatives within a specific geographic area – ours has and always will be Kalamazoo County.



How Does Our Foundation Operate?

1

Get

We **get** funds from individual donors, corporations and other foundations in the form of cash donations, bequests or other types of assets.

2

Grow

We then **grow** these funds by strategically managing them to generate new income.

3

Give

Finally, as part of our commitment to invest back into our community, we funnel this new income into the community via grants that we **give** to nonprofits that are addressing the local needs and priorities of our residents.





4

Gather

Beyond grantmaking, KZCF plays a vital role in community development and leadership by working to **gather** groups of community members together to address systemic issues.

5

Support

To ensure that we can continue to operate at full capacity, we rely on critical support and collaboration within our internal teams, which allows us to provide necessary **support** to our developing donor base.





Mission

To create a thriving community where people, resources and expertise are mobilized to advance racial, social and economic justice in Kalamazoo County.

Vision

Kalamazoo County is the **most equitable place to live.**

Community Impact *Priorities*

We believe Kalamazoo County thrives **W.H.E.N.** ...



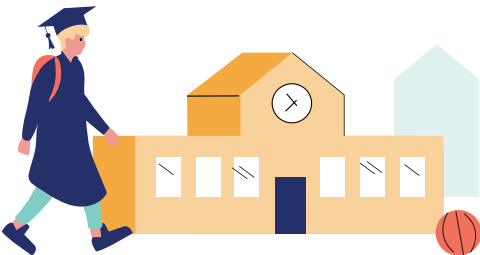
W ealth

is attainable; people have resources to meet their needs and invest in their future.



H ousing

is affordable, safe and available.



E ducation

is accessible and learners are supported.



N eighborhoods

are vibrant; health, safety and strong social connections are nurtured.

Our Core Values

CENTER ANTI-RACISM

We welcome questions that challenge us to grow and hold ourselves accountable to better serve historically oppressed communities, resulting in safety and equitable access to opportunities. Our commitment to anti-racism drives us to analyze all aspects of our work, tackle root causes of disparities and implement interventions to combat racism.

CULTIVATE TRANSFORMATIVE RELATIONSHIPS

We actualize the transformative power of authentic relationships, which drive our work, influence people, shift institutions, advance movements and grow communities. Without them, we cannot thrive. Relationships keep us engaged, sustained and hopeful, propelling change forward.

NURTURE HEALING & LOVE

We understand that liberating our communities from oppression, particularly racism, requires both individual and systemic transformation rooted in healing and love. We see healing and love as essential for driving change, and we commit to learning from the past, building authentic relationships, and engaging in both personal and collective healing. Our ultimate goal is a shared vision of liberation for all, fueled by the transformative power of love.

SERVE THE GREATER GOOD

We uphold the greater good when making decisions centered on an abundant worldview, love and our shared humanity. We center those who have been historically oppressed in order to maximize the benefit for the collective. We engage decision making that is made with people — always striving to minimize harm. We advance decisions that are rooted in integrity, honesty and transparency.

LEARN & GROW

We thrive through continuous learning and evolution, embracing the imperfect and iterative nature of the process. We pledge to apply newfound knowledge in navigating the complex, uncomfortable and non-linear path toward racial, social and economic justice. Taking responsibility for our individual learning, we foster spaces for collective reflection and analysis.

EMBRACE JOY

We believe joy is a form of resistance, liberation and connection to our wholeness amid the demands of transformational work. It is essential for sustainability, grounding and purpose on our hardest days. Joy requires space and practice. Joy takes us beyond survival and is at the center of a re-imagined, prosperous and loving community.

Why We Are Your Most Trusted Philanthropic *Partner*

Our team's expertise and long-standing relationships can help you maximize the impact of your gift.

Since 1925, KZCF has been uniquely positioned to serve the residents of our community. This means that for 100 years, we have kept a pulse on the philanthropic sector and nurtured valuable and trustworthy relationships with hundreds of local nonprofits. Each day, our Philanthropic Services & Development, Investment, Finance and Community Impact teams work together to ensure that every dollar coming in is stewarded strategically and carefully to achieve maximum positive impact on the way out.

What do these things mean for you?

♥ You can rely on our longevity.

KZCF has a permanent endowment, which means we have the capacity to weather the changing landscape of our community, both now and in the future. For example, gifts to our Love Where You Live Funds are pooled with other gifts to become part of our permanent endowment. These gifts go on to benefit residents of Kalamazoo County for generations to come no matter the economic, social or political changes that take place.

♥ You benefit from our strong investment performance.

KZCF's investment performance is within the top 10% of all community foundations! Our Financial Investment Committee and board of trustees establish investment policies and objectives, which are regularly monitored and reviewed to track investment performance. Our assets allow us to have lower fees with investment managers, so more goes to our community!

♥ You can draw from our knowledge and relationships.

Our team is connected to local charitable organizations and larger community initiatives. We are able to connect donors to causes they care about and share the impact of the investments they make in Kalamazoo County.

♥ You can connect directly with our team.

We have experienced staff who are ready to provide personalized service by phone or in person. We can assist you with every aspect of the donor experience.

♥ You can accelerate your philanthropy with our partnership and support.

We provide trusted guidance and unique offerings including assistance with your planned giving strategy, family and corporate philanthropy objectives, co-investment opportunities, and much more.

Select Your Values | Now that we have shared a bit about us and our values, we invite you to explore how you see yourself improving Kalamazoo County and making it the most equitable place to live. What are the values that you want reflected in your philanthropic journey?

Instructions | To help you select the values important to your giving, circle three to five words in the list below. For couples and families, it can be helpful to do this activity individually before sharing your responses and discussing areas that overlap or differ.

ACCESSIBILITY
ACCOUNTABILITY
ANTI-RACISM
AUTHENTICITY
COLLABORATION
COMMUNITY
CONNECTION
COURAGE
CREATIVITY
CURIOSITY
DIGNITY
DISCIPLINE
DIVERSITY
EFFECTIVENESS
EMPATHY
EMPOWERMENT
EQUITY
EXPLORATION
FAIRNESS
FAITH

FAMILY
FREEDOM
FUN
GENEROSITY
GREATER GOOD
GROWTH
HAPPINESS
HARMONY
HEALING
HEALTH
HONOR
HUMILITY
HUMOR
INDEPENDENCE
INNOVATION
INTEGRITY
INTERDEPENDENCE
JOY
JUSTICE
KINDNESS
LEADERSHIP

LEARNING
LOVE
LOYALTY
PASSION
PATRIOTISM
PEACE
PERSISTENCE
RELATIONSHIPS
RESOURCEFULNESS
RESPECT
SECURITY
SELF-ACTUALIZATION
SERVICE
SIMPLICITY
SPIRITUALITY
SPONTANEITY
STEWARDSHIP
TRADITION
TRUSTWORTHINESS
UNITY
WELL-BEING

Reflect on Your

Instructions

Reflect for a moment on the values you selected.
Why do these resonate with you?

[illegible]

Our *Love* Where You Live Funds

Now that you have identified your key values, our Love Where You Live Funds represent a great way you can put them into action.

Gifts to these funds become part of a permanent endowment of pooled assets from like-minded people, which means they benefit Kalamazoo County forever! We continue to steward these funds, so they grow and maximize the resources on hand to address our community's needs. Learn more about our Love Where You Live Funds below.

Making a gift to one of our Love Where You Live Funds is a lasting way for you to show your love for your community and be part of our work.

♥ **Greatest Needs**

Supports nonprofit programs addressing the greatest needs as they change over time to make Kalamazoo County a community where all can thrive.

♥ **Arts**

Supports nonprofit programs that honor, awaken, and nourish diverse arts and culture programming for a more vibrant and connected community.

♥ **Economy**

Provides resources for entrepreneurial and local infrastructure development, job training, and wealth-building opportunities to sustain a strong local economy.

♥ **Education**

Supports nonprofit programs from cradle to career and scholarships for post-secondary education to provide equitable opportunities for lifelong learners.

♥ **Environment**

Supports nonprofit programs to preserve and sustain Kalamazoo County's natural environment.

♥ **Health**

Supports nonprofit programs to increase the quality and access to health care services for all, improving county-wide health outcomes.

♥ **Housing**

Supports nonprofit programs that make housing affordable, safe, and available.

♥ **Youth**

Provides resources to support and develop young people in Kalamazoo County.



We contribute to the KZCF Love Where You Live Fund because we love living in a community so vibrant with culture, food and surrounding natural spaces. More importantly, there is a deep striving in our city to ensure all members of this community gain resources to live. This community thrives only when **all** of us are thriving.”

Dave McCollum and Beth Herman

Dave and Beth have been long-time supporters of KZCF’s Love Where You Live Greatest Needs Fund, helping the community address the most pressing needs.



“We said, ‘We have a business checking account at the bank earning zero interest.’ People were talking about the Kalamazoo Community Foundation. I said, ‘I think we need to investigate how we can best make this money viable not for today, but for the long term.’”



Steve and Ryane Leppard

The Solstice Foundation Fund was established in 2020 by Steve and Ryane Leppard to strategically increase their ability to invest in the community now and in the future.

Select Your Area of Focus | Now that we have shared one way we put our values into action. We invite you to explore how you might put the values you have outlined in the previous activity into action. What areas of focus do you want to see reflected in your philanthropic journey?

Instructions | Circle up to five specific focus areas of interest (e.g., special education, libraries, etc.) or write in focus areas that are meaningful to you.

- Adult Education
- Elementary & Secondary Education
- Higher Education
- Libraries
- Special Education
- Vocational & Technical Education
- Literacy
- Scholarships

- Children & Youth Services
- Fair Employment
- Family Services & Assistance
- Housing & Shelter
- Labor Unions
- Economic Development
- Food Programs & Security
- Nutrition

- Diseases & Conditions
- Hospitals & Primary Healthcare
- Medical Research
- Mental Health
- Public Health
- Rehabilitative Care
- Reproductive Health

- Climate Change
- Environmental Education
- Natural Resources Conservation & Protection
- Pollution Abatement & Control
- Recycling Programs

- Criminal Justice Reform
- Crime Prevention
- Law Enforcement
- Legal Services
- Protection Against Abuse
- Rehabilitation Services

- Arts & Culture
- Arts Services
- Historical Organizations
- Humanities
- Media & Communications
- Museums
- Performing Arts
- Visual Arts

- Civil Liberties
- Civil Rights
- Democracy
- Intergroup & Race Relations
- Voter Education & Registration
- International Human Rights
- International Peace & Security

- Disaster Preparedness & Relief Services
- Search & Rescue Squads

- Animal Protection & Welfare
- Veterinary Services
- Wildlife Preservation & Protection
- Zoos & Aquariums

WRITE IN YOUR OWN

WRITE IN YOUR OWN

WRITE IN YOUR OWN

Reflect on Your Areas of *Focus*

Reflect for a moment on the areas of focus you have selected.

Why are these areas important to you?

What is your vision for Kalamazoo County as it relates to the values and areas of focus you have selected?

Pathways for Philanthropy

KZCF provides several opportunities to partner and make an impact in your community! By establishing one of the following funds, you can ensure that your gift keeps on giving for generations to come.

♥ **Love Where You Live Funds** are community resources that are pooled together and invested to address the greatest needs facing our community at any given time. More information on these funds can be found on page nine.

♥ **Field-of-Interest Funds** enable donors to focus their giving on the community needs they care about most, such as youth, the environment, education, healthcare or the arts. Donors know their gifts will remain relevant and flexible to meet community needs in their area of interest. Our staff reviews and evaluates requests from the field and determines the best, most impactful grantmaking response.

♥ **Donor Advised Funds (DAFs)** are convenient, flexible tools for individuals, families, businesses or groups that want to be actively involved in suggesting community investments (grants) made possible by their fund.

♥ **Nonprofit Funds** are investment tools designed to support a specific nonprofit, educational institution or faith-based organization. These funds support an organization's financial goals and help with long-term sustainability and growth.

♥ **Scholarship Funds** support undergraduate and graduate education, training, professional development and other educational enrichment opportunities for individual learners.

You may also support an existing fund. With hundreds of funds to choose from, there might already be a pathway to philanthropy that is perfectly aligned with your values!

Start Your *Journey*

Join a community that embraces the spirit of philanthropy.

You have many ways to contribute to our work and the nonprofits we support. You can make a gift to any of our existing funds, including our Love Where You Live Funds, or you may open a new fund by using any of the following methods that are most applicable and convenient for you.

Connect with us!

Email the Philanthropic Services & Development team at psd@kzcf.org.

Donate from a DAF.

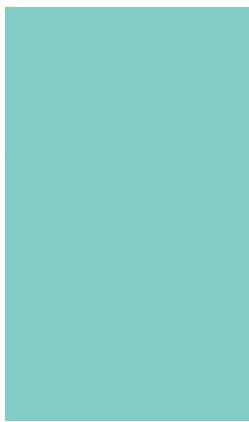
It is easy to support your community with a gift from a DAF, whether it is held here at KZCF or elsewhere!

Donate appreciated stocks, bonds or mutual funds.

If you currently hold these types of funds in a taxable brokerage account that has increased in value since you acquired them, this is one of the best ways to donate. When you donate these assets directly to KZCF, you avoid paying capital gains taxes on the appreciation and you get a tax deduction for the full value of the securities.

Give tangible personal property (real estate, art, vehicles, collectibles, etc.).

KZCF has professional staff and advisors to help you leverage more complex assets to achieve your philanthropic goals!





Use your IRA for charitable giving.

By donating directly from your IRA to KZCF through a Qualified Charitable Distribution, you can avoid tax liability and make an impact in your community! Simply contact your IRA provider and request a direct transfer to KZCF.

Name KZCF as a Life Insurance Beneficiary.

This easy, yet powerful tool for philanthropy can help you ensure that the community you love is taken care of.

Make a planned gift.

Meet with KZCF's dedicated planned giving and estate advisor and explore how we can be good partners in securing your legacy! We can help you explore how estates, bequests, IRA beneficiaries and more can be used to make an impact that lasts.

Make a gift using cash or a personal check.

You can make your gift in person or mail a check to our office in downtown Kalamazoo.
Kalamazoo Community Foundation
402 E Michigan Avenue
Kalamazoo, MI 49007-3888

Scan the QR code.

If you are ready to make a gift to your community today, we're ready to partner with you! Scan the QR code to make your one-time or recurring gift online and start your philanthropic journey with KZCF!





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FOUNDATION**

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