



PHFoundation

# 2019 ANNUAL REPORT

You make the difference. Together we make it possible.



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### Cover Image:

*Career and Technical Education students help erect the Copper Country Intermediate School District greenhouse that was funded in 2019.*

*Visit [phfgive.org/greenhouse](http://phfgive.org/greenhouse) for an amazing video of the project.*



## PHFoundation

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*The Portage Health Foundation is a 501(c)(3) charitable organization. Your contributions are tax-deductible to the extent of the law.*



The flood of summer 2018 and the work that has continued since has enlightened us further on the needs that exist in our community. It has highlighted parts of our community that need more help and attention than that which was previously given.

We are grateful for a community that supports one another and recognizes that we can accomplish more when we come together. It has been a humbling experience to be a recipient of the outpouring support, encouragement and trust which has been given and entrusted to us as we work together to meet the needs of our community. We continue to take that as an obligation to serve our community as best as we can.

We are thankful for the recognition of our work – as an organization and a community – and the respect that is implied in the recognition of both our collective achievements. We are proud to represent that which is best in us – compassion and collaboration – as we have accepted awards this past year on behalf of our community.

And we are appreciative of our partners, donors and other community stakeholders who contribute of themselves in ways that make our community better and healthier. Our hope is that you will see some examples of our collective work and successes in the following pages. Please, take time and ponder the life-changing support and influence that we have been able to accomplish together.



Dear Friends,

After the Father's Day Flood in 2018, this community stepped up in an amazing manner to help our neighbors. We were so proud of the trust you bestowed on us at the Portage Health Foundation to facilitate the remedial work needed of so many homes. In September of 2019, the Portage Health Foundation was recognized by Governor Gretchen Whitmer, with the Governor's Service Award for the work we did in response to The Father's Day Flood. I believe that our entire community shares in this award for your unparalleled generosity in response to this great need.

That sense of generosity from our community continued on into 2019 with our Giving Tuesday campaign. We had a total of 558 donors that raised a staggering \$244,932. With the \$150,000 match from the Portage Health Foundation, we were able to pass on \$394,932 to our non-profit community. Those dollars helped people in our community from the very young to the very old, and so many in between. Our entire community is filled with gratitude for your donations.

Our work at the foundation has enabled us to reach many areas of need in this community. From our grants to schools to create a healthier learning environment, funding a live fire training facility, recreation grants that encourage a healthier lifestyle, to early intervention programs for at-risk children, we are indeed endeavoring to make a healthier community through enhanced philanthropy and collaboration.

We are filled with gratitude to our very generous community. The work we do is made possible by you. I hope you will read through this annual report and feel pride in your contributions given to make our small corner of the world, a much better place to live.

I would like to close with this quote from Winston Churchill.

***"We make a living by what we get, but we make a life by what we give."***

Thank you again, and may your lives be enriched by your generosity.

Sincerely,

*Bernadette Yeoman-Ouellette*

Bernadette Yeoman-Ouellette

Chair, Board of Directors







## Foundation earns statewide recognition for flood response

After a flood ravaged our community in June 2018, Portage Health Foundation stepped up to help those in need. To date, the foundation has expended more than \$2 million and helped raise \$950,000 in private and corporate donations to help those affected. In September 2019 that effort was recognized as PHF was given a Governor's Service Award in the Outstanding Volunteer Program category. Several board of directors and staff traveled to Detroit to accept the award and take part in the spirited festivities at the historic Fox Theatre.





## Final original board member steps down

**Dr. Terry Kinzel served since 1990**

The board of directors looked a little different to start 2020 as Dr. Terry Kinzel stepped down after nearly 30 years of service to Portage Health Foundation. “He’s an exceptional human,” fellow long-term director Jeanne Kurtz said. “We’ll miss his presence, thoughts, questions and humor.”

He was a key person in starting the foundation when it served the hospital, and saw the organization through its transition to a community health foundation. While there’s a lot he can be proud of during his time with PHF, this was just one of many things that keep him going. “He lives his values, and looks out for the most vulnerable,” Kurtz said.

Dr. Kinzel is still seeing patients at UP Health System-Portage and continues to play a key role in the successes of Keweenaw Land Trust and the Churning Rapids Trail System.





## FULL CIRCLE OF FUNDING IN ACTION

By the time the police were at their house that afternoon, the two school-aged children had known for quite some time that something wasn't right. That knowledge didn't make things any easier for them as their parents were being taken away by police. The parents had been trafficking drugs - harming themselves, the buyers of their drugs and putting the children in danger.

You can imagine the emotions this would bring up for a child. Thanks to already-established partnerships, those children were far from lost in the crowd. The police had given their school a heads up that this was happening. The primary teachers and administration for the students knew to be ready when they pulled up. They knew extra attention was needed for those students and leaned heavily on the

trauma-informed best practices that they'd learned during professional development training sessions. They also knew their partnership with Dial Help to provide professional counseling at the school was about to be flexed.

There's never an easy way to get through these kinds of situations. But months later the students are no longer in danger from the illegal activities. They became closer to their teachers than ever before. Professional counseling helped them go through the emotions and turn toward a better tomorrow.

"Everything put in place like that was huge for us," said one of the teachers at the school. "When they went home it was traumatic, but there was a plan and they had help at school."



The students didn't miss a single day of school because of it. Soon after the arrests, the work began to help the parents clean up so they could be reunited with their children.

"Many agencies do their best to protect these kids," said Jason Wickstrom, a member of Upper Peninsula Substance Enforcement Team West (UPSET West) that was on the scene that day. "Sometimes the only way to really protect them is to take a family member out of the house for a while. Hopefully open up some kind of treatment avenue so they can change their lifestyles and habits so they can be reunited with their children."

Ultimately that's the goal for the UPSET West team and having a strong relationship with the schools helps make that more likely.

"Knowing that the student has the support at school that they needed is one less thing that's in the back of your mind as you're trying to get into the house and secure everything," Wickstrom said. "Everyone on our team got in this to help people. We have seen where an addict was able to get back into their lives and are succeeding in holding down a job. At least being part of their children's life again. It's hard, but that is always what we want to see in these situations."

For the school, being prepared meant they were able to provide so much better care for their students.

"It might not sound like a lot to read this, but when you see that kid upset and crying, not knowing where they would be able to go, how they would get food, how they would even live their life, it's hard," the school teacher said. "We were able to go from that to a student thriving and doing incredible work — living up to their potential."

A key part of that is the offering by Dial Help. They activated their Mobile Response Team for this situation as they didn't have a counselor on-site at that school that day.

"It helps to have someone from the outside come in," said Mandy Daniels, a prevention specialist with Dial Help. "We have people that are always on call and can be there whenever something comes up. As you can imagine, things don't always happen during our scheduled hours."

That extra attention is also regularly available to the schools through a program called Youth One Stop. Dial Help staffers like Daniels regularly visit most of the schools in the Copper Country to help students with the day-to-day needs and establish the relationships needed to be top-of-mind when crisis strikes.

"For example, when there were a couple of students who died in L'Anse last year, we were called out to support those students," Daniels said. "The schools are so thankful for us. We hear it from teachers and administrators all the time."

It's this full circle of services mindset that the Portage Health Foundation takes into consideration with its funding. Cycles of drugs and addiction cause families to have trouble, so we fund training in the schools, fund professional support to the schools and enhance law enforcement resources to stop the problems at their root. If that ends up displacing a family, the training available at schools and through programs like Dial Help is there to assist the children.

These are three of dozens of agencies that the Portage Health Foundation works with to help our future generation have a better chance at success. If you have ideas for ways that we can fill gaps, connect dots and improve offerings in our community, we invite you to talk with us. All of these projects came from ideas presented to us by people in the community, and your idea could be the next piece in the puzzle to a healthier tomorrow for Copper Country residents.



## CASH BASIS GRANT AWARD & PROGRAM EXPENDITURES FOR 2019

### Grant Awards

Omega House.....	\$17,500
City of Houghton (UPSET West).....	\$127,815
Michigan Technological University.....	\$750,000
Houghton County 4-H.....	\$1,000
Alzheimer's Association.....	\$1,000
Hiawatha Boy Scouts.....	\$1,000
NM Waters Girl Scouts.....	\$1,000
Copper Country Habitat for Humanity.....	\$1,000
Western UP Healthcare Access Coalition.....	\$1,000
Copper Country Audubon.....	\$1,000
Catholic Social Services.....	\$1,000
Calumet Art Center.....	\$1,000
Barbara Kettle Gundlach Shelter.....	\$2,000
Baraga County Shelter Home.....	\$2,000
Great Lakes Recovery Centers.....	\$4,500
Phoenix House.....	\$2,000
UP Kids – Big Brothers Big Sisters.....	\$2,000
Keweenaw Land Trust.....	\$4,000
Little Brothers Friends of the Elderly.....	\$2,575
Dial Help.....	\$10,000
Simple Kindness for Youth.....	\$4,475
Keweenaw Family Resource Center.....	\$4,500
Horizons Alternative High School.....	\$15,000
Calumet Township.....	\$2,500
Chassell First Responders.....	\$16,550
Ontonagon County Cancer Association.....	\$100
R. Decker Nursing Excellence Award.....	\$200
TRIO Pre-College Program.....	\$2,000
Dan Schmitt Gift of Music.....	\$2,000
Keweenaw Little League.....	\$2,000
Lake Linden-Hubbell Public Schools.....	\$2,000
Superior Child Abuse Prevention Council.....	\$2,000
PJ Olsson's Rock Camp.....	\$500
Salvation Army.....	\$25
Brody Strong Foundation.....	\$100
Copper Country Intermediate School District.....	\$5,000



## Grant Awards

Copper Country Intermediate School District.....	\$23,000
Stanton Township.....	\$147,941
Chassell Township.....	\$11,521
Village of L'Anse .....	\$25,000
Village of Ontonagon .....	\$16,900
Calumet Township.....	\$15,000
Copper Harbor Trails Club.....	\$9,000
Keweenaw County.....	\$3,500
Baraga County.....	\$25,000

## Mental and Behavior Health

Public Schools of Calumet-Laurium-Keweenaw.....	\$38,785
Dial Help.....	\$270,302

## Flood Relief

Relief payments to individuals and contractors.....	\$275,118
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## Scholarships

Gogebic Community College.....	\$10,000
Michigan Tech Fund.....	\$10,000
Finlandia University.....	\$10,000
NMU Foundation.....	\$10,000
James Bogan Health Scholarship.....	\$2,500
Individual Scholarships.....	\$5,500

## Giving Tuesday

Omega House.....	\$65,324
Dial Help.....	\$29,550
Baraga County Shelter Home.....	\$13,500
Barbara Kettle Gundlach Shelter Home.....	\$35,245
Copper Country Senior Meals.....	\$5,685
Dan Schmitt Gift of Music.....	\$6,755
Keweenaw Family Resource Center.....	\$21,045
Little Brothers Friends of the Elderly.....	\$101,375
Ontonagon County Cancer Association.....	\$6,405
Phoenix House .....	\$17,525
Simple Kindness for Youth.....	\$20,690
Superior Search & Rescue.....	\$6,464
Swedetown Trails.....	\$17,123
31 Backpacks.....	\$18,049
UP Kids.....	\$33,843

## Access to Care

Cancer Support – Gas Cards.....	\$2,000
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## PHFoundation

### 2019 Board of Directors

Bernadette Yeoman-Ouellette, Chair  
Brent Peterson, Vice Chair  
Ann Clancy-Klemme, Secretary  
Bruce Rukkila, Treasurer  
Michele Blau  
James Bobula  
Dr. Terry Kinzel  
Jeanne Kurtz  
Jamey Markham  
Paul Ollila

### Committee Members

Jonathan Leinonen  
Guy St. Germain

### Current Staff

Kevin Store,  
Executive Director  
  
Dr. Michelle Seguin,  
Director of Community Health  
  
Connie Greenleaf,  
Executive Assistant / Compliance  
  
Mary Jo Munch,  
Grants Management Coordinator  
  
Meghan Jaszczak, Community  
Health Educator  
  
Michael H. Babcock,  
Marketing & Communications  
Coordinator

## CONSOLIDATED BALANCE SHEET

### ASSETS

#### CURRENT ASSETS

Cash and Cash Equivalents	236,152
Accounts Receivable	50,300
Prepaid Expenses	8,093
Investments, at fair value	61,333,909
Investments, at fair value, held by Keweenaw Community Foundation	—
Equity Investments	7,891,042
Property and Equipment	34,088

#### TOTAL ASSETS

**69,553,584**

### LIABILITIES AND NET ASSETS

#### LIABILITIES

Accounts Payable	19,321
Payroll Liabilities	4,063
Grants Payable	259,046

#### TOTAL CURRENT LIABILITIES

**282,430**

Non-current portion of Grants Payable	107,144
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Total Liabilities	389,754
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#### NET ASSETS

Unrestricted Net Assets	68,926,743
Temporarily Restricted Assets	237,267

#### TOTAL NET ASSETS

**69,164,010**

#### TOTAL LIABILITIES AND NET ASSETS

**69,553,584**

## CONSOLIDATED STATEMENT OF ACTIVITIES

### UNRESTRICTED REVENUE

Contributions	5,957
Fundraising	3,724
Interest and dividends	17
Investment income; net of fees	1,249,679
Joint Venture Equity gain (loss)	569,510
Unrealized gain (loss) on investment securities	9,357,593
Realized gain (loss) on investment securities	677,069
Other income (loss)	7,388

### TOTAL REVENUES AND OTHER SUPPORT

**11,870,937**

### EXPENSES

Program expenses	1,411,065
Management and general expenses	727,610
Fundraising expenses	13,431

#### TOTAL EXPENSES

**2,152,106**

Net Assets Released from Restriction	454,707
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<b>INCREASE (DECREASE) IN NET ASSETS w/o Donor Restrictions</b>	<b>10,173,538</b>
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### CHANGES IN NET ASSETS WITH DONOR RESTRICTIONS

Contributions	492,319
Net assets released from restrictions	(454,707)

### INCREASE (DECREASE) IN NET ASSETS w/Donor Restrictions

<b>INCREASE IN NET ASSETS</b>	<b>10,211,150</b>
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Net assets at beginning of year	58,952,860
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<b>NET ASSETS AT END OF YEAR</b>	<b>69,164,010</b>
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Dear Friends,

I read a quote recently that said, “You have to do it by yourself, but you can’t do it alone.”

I found it interesting as I reflect on that statement in relation to my own life – both personally and professionally. I think for me what this means is that no matter how much work

I personally put out there, none of it would be possible without the

contributions and support of others. Those things in life that we have to tackle and to meet head on... although we have to stand-up as an individual there is an army of support and encouragement behind us. We are never alone!

The motto of the Portage Health Foundation is “You make the difference. Together, we make it possible.” As I am thinking back to all the work of 2019, I can’t help but think about all the school faculty that are making a difference in the lives of their students. The one-on-one moments that those kids need and the support the teachers are giving them. I am happy that the support of our trauma and resiliency programming and training is helping those teachers be more in tune and more equipped to support their students in that process.

I recently discussed with Dr. Joseph Kirkish (Joey for those that know him best) how he has always wanted to feel like a philanthropist. Although he is making a decision of charity, together we are able to identify areas of need where his support can make a real impact in the lives of those touched by his generosity. Most often, his own humility does not allow him to see how the gifts of himself and of his resources have made an immeasurable difference in countless people – young and old – throughout our community.

There are so many other examples of conversations that have led to collaborations that have led to greater works within our community than I can mention in this letter. My hope is that the few examples presented in this report will encourage you to think about your own contributions. I want you to consider and be proud of the ways that you make a difference every day in our community. And for our partners, we want you to know that your support and your contributions are life-changing for someone you may never meet or get to know.



Please know that we are thankful for your support and collaboration. We feel privileged for the opportunity to serve our community. We know we can’t do it alone – and we are glad that we don’t have to.

Thank you!

A handwritten signature in dark ink, appearing to read 'K N Store'.

Kevin N. Store  
Executive Director



**PHFoundation**

400 Quincy Street  
P.O. Box 299  
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**You make the difference.  
Together we make it possible.**

**Mission:**

To positively influence a healthier community through enhanced philanthropy and collaboration.

**Vision:**

- To influence a shared vision
- To foster collaborations and partnerships
- To build community capacity to shape outcomes