

## **Michigan Masonic Charitable Foundation 2009 Annual Report**

*The mission of the Michigan Masonic Charitable Foundation (MMCF) is to provide quality programs and services for Masons and their families while making communities a better place to live.*

Dear Brothers,

In the year just passed, the Michigan Masonic Charitable Foundation (MMCF) has greatly increased our outreach to our Brothers and lodges throughout Michigan. In accordance with the MMCF's Strategic Plan, we now have an active presence in all areas of the state. We have a greater ability to keep our fraternity informed about the programs and activities made possible by MMCF.

Our main focus is on increasing charitable giving. The generosity of individual Masons over many years has made it possible for MMCF to meet the charitable needs and expectations of our Fraternity. We have taken important new steps to grow our donor base so that, together, we can continue making a positive difference, now and in the future.

Below you will find a detailed report on MMCF's activities in the last year, along with stories on how the MMCF has worked with individual Masons and lodges, to positively impact lives. These stories remind us of the impact that we have when working as partners. We are pleased to provide this report to the delegates and brethren attending the 2009 Annual Communication of the Grand Lodge F.&A.M. of Michigan, and we offer a heartfelt thanks to our Fraternity members for their support and guidance

### **Implementing the MMCF Strategic and Work Plans**

In the 2009 fiscal year, the Foundation, under Executive Director Brother Lawrence Wallach and the MMCF Board, began to implement the Strategic Plan which was adopted by the MMCF Board in 2008. The MMCF's Strategic Plan called for the MMCF to increase its donor base through development of a multi-year, systematic program of lodge and person-to-person outreach. The Board recognized that, to increase charitable giving, the Foundation had to significantly increase its presence throughout the state and greatly increase awareness among our Masonic Fraternity about the MMCF, the programs it funds and needs it meets.

The task is especially important and time sensitive. More than 60% of our Fraternity members are over the age of 65 and nearly 40% are over 75. The time for broadened outreach and greater fundraising effort is now. To that end, the Foundation is happy to report that, despite a budget

that is notably smaller than last year's, MMCF has the staff and resources in place to take full advantage of the opportunity to grow the MMCF's endowment and continue to support the needs of our fellow Masons and lodges. With good stewardship and careful cost control, we are making our dollars go farther while working harder and smarter to lay the groundwork for success.

## **Outreach & Communications**

Asking potential donors to support the work of an entity they know little about is putting the cart before the horse. Unless their life circumstances, or those of a close loved one, brought them into direct contact with the Foundation, many of our brethren have only limited knowledge about the MMCF and its role in funding programs and activities within our Fraternity. That is why the MMCF is greatly increasing its public awareness and outreach to Masons, lodges and Masonic groups across the state.

### ***MMCF Website***

MMCF's new, user-friendly website (**[Michiganmasonsfoundation.org](http://Michiganmasonsfoundation.org)**) went up in late June, 2008. The site offers users a detailed overview of what the Foundation helps to fund, and the different ways Masons (and others) can support our efforts through many types of charitable giving. One innovative feature allows users to calculate the income they can receive through a Charitable Gift Annuity. Users can also make donations to MMCF on-line and even specify the program they wish their donation to support.

### ***Brochures and Informational Materials***

The Foundation now has a new brochure providing a general overview of the MMCF, its mission, what it funds and a description of the different types of charitable gifts Masons and their families can make to support the Foundation's work. A basic brochure on Charitable Gift Annuities, which benefit both the MMCF and the donor, will soon be available. A short DVD, focusing on several of the people whose lives have been made better through the MMCF's support, will soon be available as well. All of these materials will be accessible to Masons and lodges throughout the state, from the MMCF representatives in each region or through the MMCF's office in Alma.

### ***Newsletter & Magazine***

The MMCF is deeply involved in the changes to the Grand Lodge's newsletters and magazine. MMCF is working closely with Brother Bob Conley, MWPGM, in developing and producing the Grand Lodge's new magazine, which will be an unprecedented collaborative effort between the Grand Lodge, MMCF and Pathways. We are also continuing **On the Level**, the MMCF's newsletter to donors, which is published twice a year.

***Presentations to Lodges, Groups and Gatherings***

The information contained on the MMCF website and in our brochures is also covered in the personal presentations MMCF representatives have been making to lodges, other Masonic groups since last fall. Since September 2008, MMCF representatives have made presentations in approximately 40 lodges and at more than 60 other meetings. Brother Lawrence Wallach has also spoken about the MMCF at most of Grand Master Jungel’s Town Hall meetings in the fall and spring. More than 3,000 of our Masons have heard a personal presentation about the MMCF and charitable giving in the past year.

***Hosting BGP/DDI Lunch at Annual Communication***

This year, for the first time, the MMCF will host the BGP/DDI’s Tuesday lunch at the Annual Communication, as a tribute to the work that both groups do and as a thank you for the help and guidance provided to MMCF Representatives by members of both groups. The MMCF will also have a staffed table at Annual Communication, and we urge all delegates to stop by.

**Charitable Giving**

The MMCF can only continue to support the programs and activities we do through the generosity of our Masonic Fraternity. As has always been true, it is the donations of individual Masons that make it possible for us to meet the needs and expectations of our communities.

In the 2009 fiscal year, (April 1, 2008 to March 31, 2009), the MMCF received 3,778 gifts and bequests, for a total of \$2,098,273. This includes funds received and bequests that have matured and are in various stages of the probate process.

Annual Appeal	93,511
Bequests (Received)	804,840
Other	299,922
Total Cash	1,198,273
Bequests (Matured)	900,000
<b>Grand Total</b>	<b>2,098,273</b>

The current economic situation presents us with unprecedented fundraising challenges this year. Yet, MMCF’s plans to increase charitable giving are based on a clear understanding by its leadership and Board that the work necessary for success is not short term. It will take 3-4 years to begin to see the major results from the work we do today. When the economy does improve, it will be the charitable groups that did the hard, careful relationship-building work during difficult times that will experience the greatest fundraising success. Those that stopped or reduced outreach, relationship building and donor development to save short term dollars will have to start from scratch, losing both time and opportunity. It is imperative that the MMCF be among those that keep up the hard work in hard times.

## ***Regional-Based Fundraising Plan***

In the fall of 2008, the Foundation implemented a statewide plan to increase both charitable giving and the involvement of our Masonic brethren in helping achieve that goal.

The Foundation divided the state into five regions. Region 1 is the Upper Peninsula. Region 2 is the Northwestern part of Michigan. Region 3 is the Northeastern Lower Peninsula. Region 4 is Southwestern Michigan and Region 5 is the Southeastern Part of the state. Each region has MMCF representatives assigned to it. MMCF representatives in each of the regions serve as the major point of contact between MMCF and individual Masons, lodges and other Masonic groups in the region. Regional Representatives also visit lodges and other Masonic groups to give informational presentations about the MMCF and charitable giving. They also contact and work with prospects who may become donors.

## ***Ambassadorial Advisory Councils***

MMCF will be working with Masonic leaders in each region to set up an Ambassadorial Advisory Council to consist of approximately 5-7 Masonic brothers who have a history of leadership and strong involvement with their lodges and other Masonic bodies. Members will include local and regional Masonic leaders, former Grand Lodge officers, and others with a strong interest in our charitable mission.

Ambassadorial Advisory Council members will work with MMCF Regional Representatives in reaching out to Masonic brothers to inform them of the programs and activities MMCF supports. They will also play a key part in helping to increase donations and commitments by brethren to remember the MMCF in their wills and estate plans—which is the purpose behind membership in the Lewis Cass Legacy Society.

The benefits of developing this region-based model of highly committed Ambassador/Advisors working closely with MMCF Regional Representatives in each region are many. Among the most important:

- It allows MMCF to develop an in-depth presence and focus in each region.
- It provides the MMCF with the assistance and guidance of brothers who play integral roles in their regions.
- It offers brothers yet another avenue for leadership to help MMCF fulfill its charitable mission by acting as “peers” whose voice, actions and influence can be particularly effective in developing increasing charitable support among our Masonic brethren.

In several regions, the process is already well along, and initial meetings with the Advisory Councils are set. By summer, the Foundation expects to have Ambassadorial Advisors identified and organized in each region of the state. You will be hearing much more about the Foundation’s activities in your region, as one of the Foundation’s key objectives is to work with Ambassadorial Advisory Councils to develop a social event for all members and lodges in each region. These will be events where brethren and their wives can socialize, connect or reconnect as they learn about the MMCF and the ways they can help support the Foundation’s work.

### ***Lewis Cass Legacy Society***

The Lewis Cass Legacy Society exists to honor Masonic brothers and their families who commit, in writing, to making a bequest in their will or estate plan to support the work of the MMCF. This form of charitable support is especially important, as the vast majority of the charitable gifts MMCF receives come from bequests made by Masonic brothers and their spouses. **Since the inception of the Lewis Cass Legacy Society in 1999, its members have provided the MMCF with almost \$2.8 million, either in outright gifts, charitable gift annuities, or in bequests.**

An increase in Lewis Cass Legacy Society membership was a major MMCF objective for 2008. MMCF's new focus and structure have already yielded significant results in this area. MMCF Regional Representatives have spoken about the Foundation and the Lewis Cass Legacy Society at meetings of every kind and are working closely with dedicated Ambassadorial Advisors in each region. Together, they significantly increased Lewis Cass Legacy Society Membership, which has grown in the last year, from 268 to 466 members, an increase of almost 75%. This year's Lewis Cass Legacy Society Annual Dinner, on April 25<sup>th</sup>, was the largest we have yet held, with attendance approaching 250.

In joining the Lewis Cass Society, you indicate your intent to remember the MMCF in your estate plan. It can be as simple as putting the following provision in your will:

***“I give, devise and bequeath \_\_\_\_\_% of my estate (OR, all of the rest, residue and remainder of my estate), to the Michigan Masonic Charitable Foundation, located at Alma, Michigan, to be deposited into its endowment fund.”***

By including the Foundation in your estate plan, you help to guarantee that the MMCF continues to be there for Masons in need. It is easy to join the Lewis Cass Legacy Society. Just contact the MMCF Office at 1-800-994-7400 and ask for Diana Bradley at extension 3803. She will be happy to mail you an application.

### ***The Story of an Ambassador: Charles Kramsvogel***

A longtime brother, who very recently passed away, embodied the Masonic values and charitable commitment that we are seeking to mobilize in all areas of the state. His story follows.

*“The greatest people never talk about themselves, but help others.”*

This was said by many at the April 13, 2009 memorial service that paid tribute to the life of Charles Kramsvogel, a 33° Scottish Rite Mason, from the Scottish Rite Valley of Grand Rapids. Over 400 people attended the simple, but elegant Masonic memorial service on April 13, 2009.

Charles Kramsvogel lived and led by example. This was evident in his military service when, in the Korean War, he received the Purple Heart with Clusters and a Silver Star. His leadership was on display in his work as a lighting engineer for Consumers Power, where he was a key contributor in designing the lighting for the Mackinac Bridge.

Charles used his influence and affluence to benefit the Michigan Masonry, and the Chicago Shrine Hospital. He served as Chairman of the Masonic Home Board, and was a great force in the High 12. The Michigan Masonic Charitable Foundation was deeply appreciative of Charles' willingness to provide the Foundation with the benefit of his skills and abilities. The Lewis Cass Legacy Society was only an idea when Charles and Joan Kramsvogel first became ardent supporters and true Ambassadors. Over a period of four years, Charles recruited dozens of new members to the Society, even as he brought in more Ambassadors to connect Masons to the Mission of the Michigan Masonic Charitable Foundation. His fellow Lewis Cass Legacy Society Ambassadors in Grand Rapids honored Charles with a special dinner and award evening in February 2009.

Because of his demonstrated accomplishments and leadership, Charles was asked to become a MMCF Ambassadorial Advisor, which he agreed to do just prior to his sudden passing in April. He did much, and wanted to do more yet. As a true leader, Charles' be missed by all, but especially by the Michigan Masonic Charitable Foundation. Charles Kramsvogel. A leader. A Philanthropist. A Mason.

### ***Changes to Annual Appeal***

Another MMCF objective in the past year was to enhance the annual Deputy Grand Master's Appeal. Last year, the MMCF raised just over \$92,000 through the Annual Appeal, an increase of 4% over the prior year. MMCF is striving to increase both the number of annual appeal donors and the average amount that donors give. Annual Appeal letters, which go out each spring, will be personalized starting this year. The Annual Appeal will now have a set goal for each year. For this year, the goal is \$100,000. We hope all in our Masonic family will participate in the Annual Appeal to the fullest extent their individual circumstances allow.

### ***Generous Donor: Robert Lantz***

Our Masonic Fraternity has touched people in many ways, and we, in turn, are always deeply impressed by the way those we impact have chosen to show their deep and lasting goodwill. Robert Lantz's story is one example of this.

In early 2003 Robert Lantz, of San Diego, California, contacted the Michigan Masonic Charitable Foundation's office inquiring about the Lewis Cass Legacy Society. Mr. Lantz's father had been a loyal Michigan Mason from Saginaw, and Masonry was a large part of his life. Mr. Lantz explained that, when his father died, he had a Masonic funeral. Though he was not a Michigan Mason, Robert Lantz was so deeply moved by the Masonic Memorial service for his father that he wanted to join the Lewis Cass Legacy Society.

Mr. Lantz never attended the annual Lewis Cass Legacy Society recognition dinner, yet he always made sure to express his gratitude to the Foundation for every gift and birthday card he received from the MMCF. One year however, Lantz's annual gift was returned by a representative from his estate, who indicated that Mr. Lantz had passed away.

In September, 2008, the Michigan Masonic Charitable Foundation received a generous gift of \$105,000, which was one third of Robert Lantz's estate. This story is another lesson that we should never underestimate how the caring and character show by Masons and the Masonic Fraternity touches those who experience it.

## **Staffing**

The MMCF staff is led by Executive Director, Brother Lawrence Wallach, of Livonia Lodge #586. Brother Wallach, working with a committed and talented staff, directed and oversaw the development and implementation of the outreach and fundraising plans that now guide the MMCF's work. He is committed to ensuring that the MMCF has the capability to meet the needs and expectations of our Fraternity and of individual Masons, now and in the future.

None of the outreach, awareness and fundraising plans and activities described in this report would have been possible without the staff to make it happen. Prior to the summer of 2008, MMCF staff consisted of Executive Director Brother Lawrence Wallach, Brother Keith Bankwitz, of Livonia Lodge #586, Director of Philanthropy, and longtime Administrative Assistant Diana Bradley. It was not possible for any one or all of them to handle ongoing activities and events and build an extensive and intensive presence throughout the state.

Beginning in July 2008, four new staff members joined Brother Wallach, Brother Bankwitz and Diana Bradley to undertake the activities described in the MMCF Strategic and Work plans. Brother Joe Corrado, who is a member of Paw Paw Lawton Lodge #25, is the MMCF Regional Representative for much of Southwestern Michigan. Brother Corrado brings to his position an extensive background in fundraising and works closely with members and lodges to build Lewis Cass Legacy Society Membership and to increase other charitable giving in his region.

Brother Craig Maison, a member of Traverse City Lodge #222, is known to many in our Fraternity from his extensive involvement in Masonic activities at every level. Brother Maison is the MMCF Regional Representative for much of Northwestern Michigan and the Upper Peninsula, and assists Executive Director Brother Lawrence Wallach in developing and growing the donor base in the Oakland/Macomb/Livingston area, where he has family and extensive connections.

Rikka Bos, formerly Marketing Director at Pathways, joined the Foundation as Communications Director. In that role, she oversees the development of all MMCF written materials, including brochures, newsletters and informational pieces, as well as the organization of the annual Lewis Cass Legacy Society Dinner. Rikka also represents the MMCF at selected events and works in collaboration with Brother Bob Conley, MWPGM, in the preparation of the new Grand Lodge magazine and newsletters which go to all Masons.

Finally, Peggy Wright is responsible for the processing of all invoices, provides clerical support and assistance to the MMCF Regional Representatives by tracking events and activities within their regions. She also provides valuable assistance to Diana Bradley with record keeping, preparations for the annual Florida and Arizona reunions and the Lewis Cass Legacy Society Dinner. Diana remains responsible for the MMCF prospect and donor database.

## Charitable Support Provided by MMCF

During the past fiscal year (April 1, 2008—March 31, 2008) the Foundation provided almost \$4.5 million to support Masons, their communities and the Masonic Fraternity. Below is a breakdown of the programs that received MMCF funding in fiscal year 2009:

• Masonic Assistance (Provided through Masonic Pathways)	3,915,000
• Outside Relief	72,000
• Scholarships (Matching Lodge Grants)	117,450
• Community Charities (Matching Lodge Grants)	51,260
• Library and Museum	146,680
• Michigan Child ID Program	110,000
• Student Assistance Program	30,000

**Total: 4,444,390**

### *Masonic Pathways*

This past year, MMCF subsidized approximately 200 residents at Masonic Pathways, making it possible for them to reside at Pathways. This assistance represents a combination of support for indigent Masons and for Masonic-affiliated residents at Pathways.

### *Outside Relief*

MMCF provided nearly \$72,000 for home assistance to 25 Masons in need.

### *Student Assistance Program*

The MMCF supported two Student Assistance Programs in Flint and Dowagiac.

### *Masonic Library & Archives*

The Masonic Library & Archives in Grand Rapids, so ably managed by Brother John Wallsteadt, P.M., is also a part of the MMCF. The library and archives are a great treasure trove of Masonic History. They are also valuable sources of Michigan history, genealogical research and a place where the public can learn about Masonry. We are now developing plans to greatly increase public awareness of and access to the library and archives.

### *Matching Funds for Community Charities & Scholarships*

In the past year, the MMCF provided 96 Community Charity matching grants in response to requests from 66 lodges. MMCF Matching funds helped a wide range of community charities supported by lodges throughout Michigan. This is grass roots charitable support--all of the needs and programs supported by Community Charity Matching Funds are chosen by local lodges

seeking to serve people in their areas. Lodges apply MMCF matching funding to increase the amount of support they provide those in need, increasing the impact of their support. Below are just a few examples of local lodge charitable grants that were matched with MMCF funding last year:

- Lakeshore Lodge #298 received matching funds for a grant to outfit a home for an area veteran who became a quadriplegic when he was shot in the neck while serving in Iraq;
- Birmingham Lodge #44 received matching funds to make a grant to a young widow whose husband was a member of the lodge;
- Mt. Vernon Lodge # 166 received matching funds to make a grant to a Habitat for Humanity project to construct homes in Branch County.
- Traverse City Lodge #222 received matching funds for a grant to Camp Quality, a summer camp for children battling cancer;
- Corinthian Lodge # 241 received matching funds for a grant to Brighton Hospital's Addiction Treatment Facility, which they gave in honor of Brother Ivan Ludington;
- Carson City Lodge # 306 received matching funds for a grant to provide assistance to the Carson City Fireman's Auxiliary;
- Clam Lake Lodge #331 received matching funds for a grant to support field trips for students in Cadillac Community Schools;
- McMillan Lodge #400 received matching funds for a grant to provide a personal emergency response system to areas senior citizens;
- John Q. Look Lodge #404 received matching funds for grant to send two World War II veterans on a trip to Washington, DC. to visit the national WWII Memorial.

The MMCF also provided almost 257 grants to match lodge scholarships awarded to deserving students selected by 108 lodges. These scholarships assist students with the cost of college and help them attain the education they will need to become the employees, citizens and community leaders of tomorrow.

MMCF's matching grants help your lodge make a positive difference in lives of people of all ages and backgrounds in communities across the state. They increase the impact of your lodge's charitable giving. They are a great example of Masons making a difference and of how the MMCF can be a partner for you and your lodge. This year and in future years, we hope to see a greater number of lodges take full advantage of the Community Charity and Scholarship matching grants.

***Touching People's Lives***

It is important to remember that all of the programs and activities MMCF supports are about helping *people*; about providing relief to those who, due to various circumstances, find themselves in need or distress. This is our mission and the reason for our existence. This is also a key Masonic value. Below is one particularly powerful example of how our lodges take community charity and service to heart, even when facing their own special challenges.

### ***The Mt. Moriah Lodge #226***

In 2001 the Officers and Brothers of Mt. Moriah Lodge #226 in Caro voted to establish an endowment fund. The Brothers worked hard developing a series of volunteer-organized events and dinners. Whenever possible, volunteers sought donations of food and supplies to help keep costs down. As a result of their stewardship and hard work, the Brothers were able to establish a significant endowment fund.

In late 2004, a devastating fire roared through the Mt. Moriah Lodge, causing over \$550,000 in damage to the building and to furniture, furnishings and artifacts that had been a part of the lodge since they were hand-crafted in the 19<sup>th</sup> century. Rather than exhaust their endowment fund, the Officers and Brothers looked at the tragedy as an opportunity. Brothers combed through the wreckage and salvaged what they could. Relying on proceeds from their insurance company, members of Mt. Moriah took a personal role in restoring precious artifacts and furniture, some of which many feared were damaged beyond repair.

Even as their lodge was being repaired, the Officers and Brothers of Mt. Moriah Lodge #226 kept up their lodge work and even raised twenty-nine new Brothers in borrowed quarters. They also continued holding dinners and other special events, over time rebuilding their endowment fund, which now totals over \$140,000.

Using the same stewardship and diligence that built an impressive endowment fund and restored their Lodge, the Brothers and Officers of Mt. Moriah Lodge have utilized the Michigan Masonic Charitable Foundation Scholarship and Community Charities Programs to benefit their community. In 2008 alone, Mt. Moriah Lodge awarded seven \$500 scholarships, for which it received \$1,500 in matching funds from MMCF. In 2009, Mt. Moriah Lodge hopes to award five additional \$500 scholarships and ten \$750 scholarships, for a total of \$10,250 to college-bound high school students and undergraduate college students.

Also in 2008, Mt. Moriah Lodge contributed over \$3,400 towards the construction of the Caro Community Pavilion, a joint project supported by several area individuals and businesses. The Michigan Masonic Charitable Foundation provided \$1,500 in matching funds. Mt. Moriah Lodge is also planning the construction of a food pantry to feed thousands in surrounding areas.

Together, we *do* make a difference.

### ***Trustee Leadership***

One new Trustee, Brother Fred Kaiser, RWJGW, joined the MMCF Board in the past year. Brother Kaiser joined the MMCF Board when he entered the Grand Line as Junior Grand Warden.

### *Closing Comments*

The year just passed saw unprecedented action and innovation. The MMCF and its representatives are making presentations and visits to lodges, meetings and individuals in areas of the state that had previously never been visited by anyone from the Foundation. The MMCF is undertaking activities that it has not before engaged in, even as it seeks out committed volunteers and supporters among our Masonic Fraternity to take leading roles in activities that are totally new to them. All of this is being done for a vital objective—to make sure that MMCF has the resources to continue to be a strong partner for Masons and lodges, now and in the future.

Much has been started, yet much remains to be done, despite *and* because of the economic challenges we are all facing. The partnership that exists between the MMCF, our lodges and the members of our Masonic Fraternity proves each day that, together, we are making a positive difference—for our Fraternity, our Masonic families and the communities of which they are a part. We are grateful for your support and encourage each of you to consider new opportunities to achieve our noble tenets by expanding Masonic philanthropy in Michigan.

Sincerely and Fraternaly,

### **Michigan Masonic Charitable Foundation**

#### **Board of Trustees**

Michael J. Jungel, M.W. Grand Master  
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Frank Ted Praria, R.W. Senior Grand Warden  
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#### **Staff**

Lawrence Wallach, Executive Director  
Keith Bankwitz, Director of Philanthropy  
Joseph Corrado, Regional Representative  
Craig Maison, Regional Representative  
Rikka Bos, Communications Director  
Diana Bradley, Senior Admin. Assistant  
Peggy Wright, Admin. Assistant