

# How might your local community foundation assist your county with opioid settlement funds?

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**Community  
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**FOR SOUTHEAST MICHIGAN**

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**Who are we?**



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# Community Foundation for Southeast Michigan




Est. 1984

## Vision

Southeast Michigan is a place where everyone thrives

## Mission

Make southeast Michigan a desirable place to live, work, and play for all residents, today and tomorrow



# Community Foundation for Southeast Michigan

- Serving the seven-county region of Southeast Michigan
- Assets: Approximately **\$1.3 billion** as of February 2024
- Endowment Pool: **\$885 million**
- Grants: 4,701 grants totaling more than **\$120 million** in 2023
- Gifts: More than **\$117 million** in 2023



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**What is a community  
foundation?**

# Community Foundations 101

In 1914, the Community Foundation model – combining charitable resources from local philanthropists into a single and permanent endowment – was established in Cleveland, OH.

- Established to solve a bank problem: the bank didn't have the ability to change the charitable trusts they were managing, even when the purpose became unfulfillable, without significant legal work and costs.
- The origins of CF variance power – the ability to modify the restrictions on a charitable gift, a hallmark of all community foundations.
- More than 900 CFs in the United States, with nearly \$100B in assets / \$10B in giving annually.
- Other hallmarks are the involvement of community in grantmaking, and the pooling of contributions.

# Community Foundations 101

- Savings account for community
- Trusted source for philanthropic advising
- Experienced grantmaker and partner
- Ensures a vibrant, resource-rich community for generations
- Local, focused, permanent, and solution-oriented
- Unlike other foundation types, with money from one source – CFs fundraise and make grants

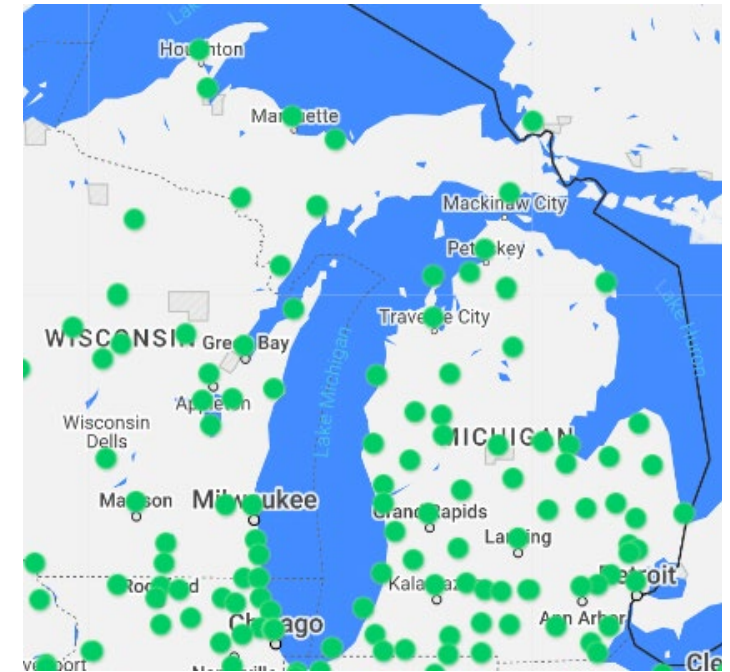


# Community Foundations 101

Michigan is a philanthropy leader – every county is covered by at least one community foundation.

- Oldest = Grand Rapids, established in 1922.
- Collective assets of more than \$4.7B, with \$260M+ grants annually.
- ~62 CFs across Michigan

Inspired by the W.K. Kellogg Foundation, which provided matching dollars: every \$2 raised at a CF would be matched with \$1 for youth funds.



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**What can community  
foundations do?**

# Awareness Raiser

As a trusted, local organization, community foundations often lift up the voices and data in their region.

This can be accomplished by activities such as:

- Commissioning independent research
- Educating the public, officials, key stakeholders
- Conducting surveys of donors, grantees, residents, or key populations / demographics
- Funding work by a nonprofit to elevate or advocate for an issue
- Identifying key issue areas and dedicating unrestricted or field-of-interest assets to funding
- Conducting local needs assessments

# Convenor

As an organization that funds across many issues and has a multitude of relationships, community foundations can use their network to convene others.

This can be accomplished by activities such as:

- Hosting community-wide information sessions or meetings
- Offering meeting space for a group of nonprofit leaders who work on similar/related issue areas
- Identifying and pulling together local leaders in talking about key challenges faced by the community

# Connector

As an organization with both broad and deep expertise, the community foundation is often able to identify commonalities of unconnected efforts, and make introductions.

This can be accomplished by activities such as:

- Facilitating an introduction for a new institutional leader to experienced key players in the community
- Making recommendations of nonprofits performing related work to an effort (for example: connecting a food bank to the food security work done by a youth mentoring program)

# Funder

As a key source of local funding, a top priority of community foundations is providing grant and scholarship funding to improve the quality of life in their region. Every community foundation sets different priorities and structures for how this funding is awarded.

This can be accomplished by activities such as:

- Operating a competitive grant program organized around a specific topic or activity
- Awarding grants to key priority areas / projects
- Making annual grants to a specific nonprofit, as a sustaining portion of their budget

# Endowment Holder

One of a community foundation's other key functions is the establishment and management of endowments on behalf of a community or organization. There are different types and purposes of such endowment funds.

This can be accomplished by endowments with purposes such as:

- For the general benefit of a specific geography
- For the benefit of a specific topic/issue area
- For the benefit of students pursuing education
- For the benefit of a specific nonprofit or agency
- For advancing the philanthropic goals of an individual, family, group, or company

# What is an endowment?



Money reinvested for future growth

## Endowments are like apple trees:

- Pools of money, invested to generate interest

**Apples:** interest generated by the endowment

- Use apples (as grants) for supporting your work
- Compost apples to build the tree, like reinvesting

**Never chop down tree:** no access to the fund's principal

- Exists into perpetuity, always ensuring apples

**Endowments are a legacy for our community.**



# Endowment Holder

Endowments are ideal for:

- Investing and planning for the long-term (over decades and centuries)
- Access to balanced investment portfolios at CFs
- Assets meant to be a legacy for the community, or in memory of an individual, family, or company
- Creating a fertile soil for charitable activities that support a vibrant community
- Resources that address changing community needs, over time, possibly with expert staff and resident input

# Endowment Holder

Endowments are NOT ideal for:

- Short-term projects
- Dollars that will be needed in the future
- Small asset sizes
- Very restrictive purposes
- Funding issues/needs that will disappear over time

Endowments like these typically pay out ~3-4% annually.

- For a \$250K fund, annually \$7,500 available.
- For a \$2M fund, annually \$60K available.

## Example: DNR Spark

- Established to equitably guide resources to communities and expand access to healthy indoor and outdoor recreation projects where there has been little or no previous parks and recreation investment
- Centering community voices and engaging a diverse array of community residents in all aspect
- 29 opportunity communities receiving funding through the CMF/DNR Spark Grants partnership
- Examples include:
  - Development of a new park with a playground and splash pad in Benton Charter Township.
  - Updates to Wheatley Park's restroom, baseball field and playground in the City of Inkster.

# Example: Statewide Equity Fund

- \$2 million fund to empower Michigan philanthropy to strategically pool resources for systemic change.
- Designed to provide the infrastructure needed to help shape American Rescue Plan Act (ARPA) funding and other federal dollars toward equity-centered approaches to advance economic prosperity in communities.
- Pilot with five regional collaborative sites working closely with their local units of government to help shape investments toward equitable outcomes within the focus area of economic prosperity.
- Ann Arbor Area CF, CF of Greater Flint, CF of Marquette County, Grand Rapids CF, and Pontiac Funders Collaborative

# Example: Tobacco Settlement Funds

- Bipartisan supported legislation resulted in the Council of Michigan Foundations distributing a portion of the tobacco settlement funds to community foundations in Michigan.
- Funding was directed to support programs at the regional/community level that contribute to healthy youth and healthy seniors.
- Advised by a local committee, comprised of representatives from local health organizations, public health, tobacco reduction coalitions, and youth in the community.
- Structured as 50% direct grantmaking and 50% endowment for permanent local support of youth and seniors.

# Example: Michigan Opioid Partnership (MOP)

Est. 2018

**Purpose:** Strategically leverage funding & address gaps

**Goal:** Decrease Michigan opioid overdoses and deaths



# Origin of the MOP

## **2017:**

Michigan ranked 8<sup>th</sup> for number of overdose deaths, which increased 17-fold since 1999.

Five funders created the initial project.

## **2018:**

Additional funders joined and rebranded as MOP.

## **2019:**

MOP announced a five-million-dollar response to the overdose crisis in partnership with the state.

# Community Foundation as the Home of the MOP

Fiduciary of  
Pooled Funds  
& Public  
Dollars

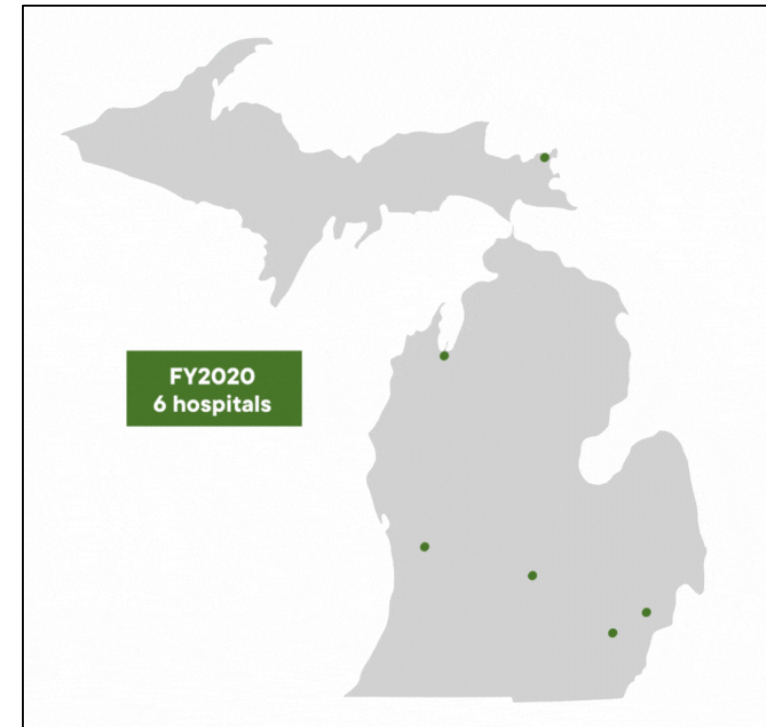
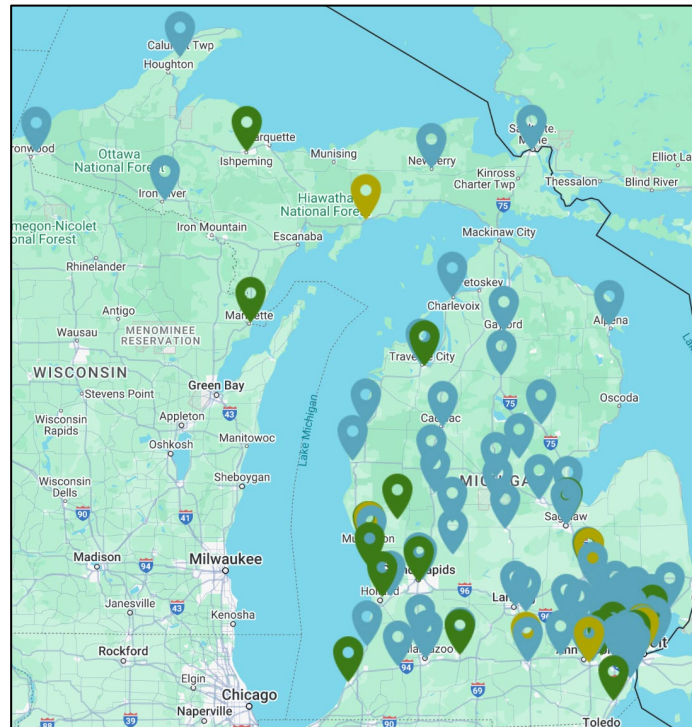
Convene &  
Engage the  
Community

Project  
Management  
& Leadership



Since 2019, MOP granted over \$7 million to support the work of hospitals, nonprofits, jails, and community foundations.

- Harm Reduction Project
- Jail-based Screening & Treatment
- Post Overdose Rapid Response Effort
- Emergency Department Medication for Opioid Use Disorder Initiative





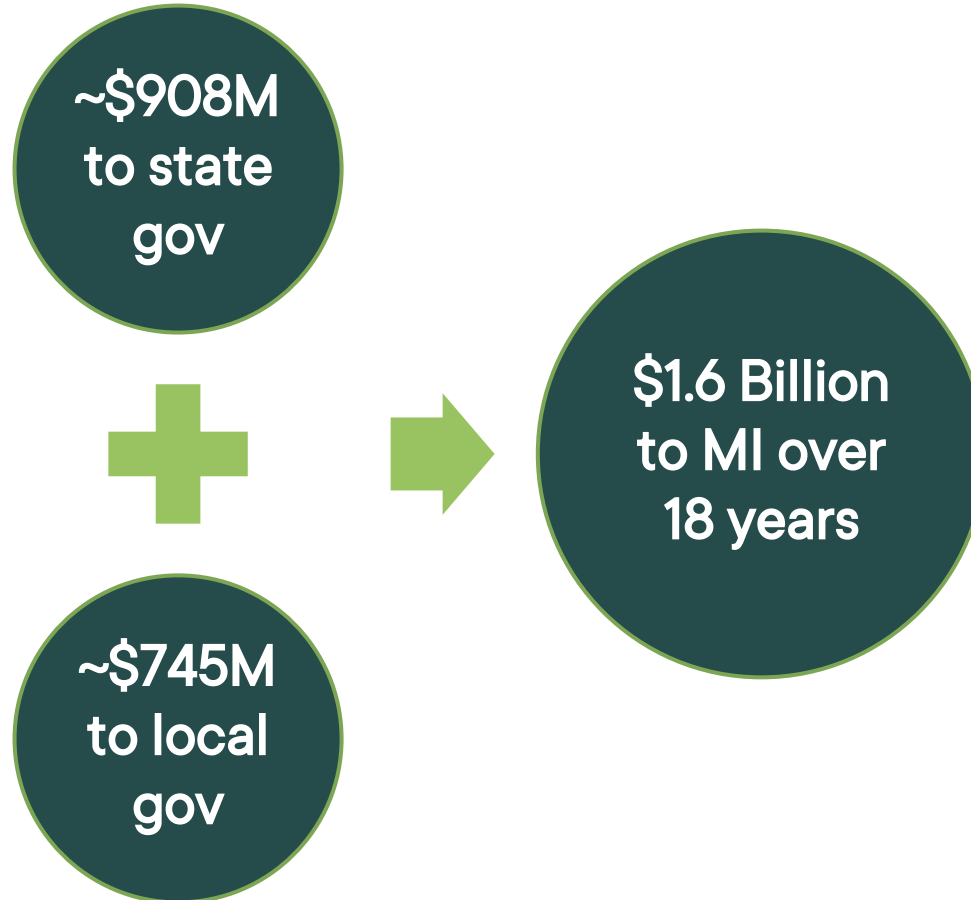
**Collaboration has been the key to success.**

- Subject Matter Experts & Clinical Champions
- Vital Strategies & Johns Hopkins Bloomberg School of Public Health
- Michigan Health & Hospital Association Keystone Center
- Michigan-based Philanthropic Organizations
- Michigan Department of Health & Human Services

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**How might community  
foundations partner on opioid  
settlements?**

# Opioid Settlement Funds Refresher



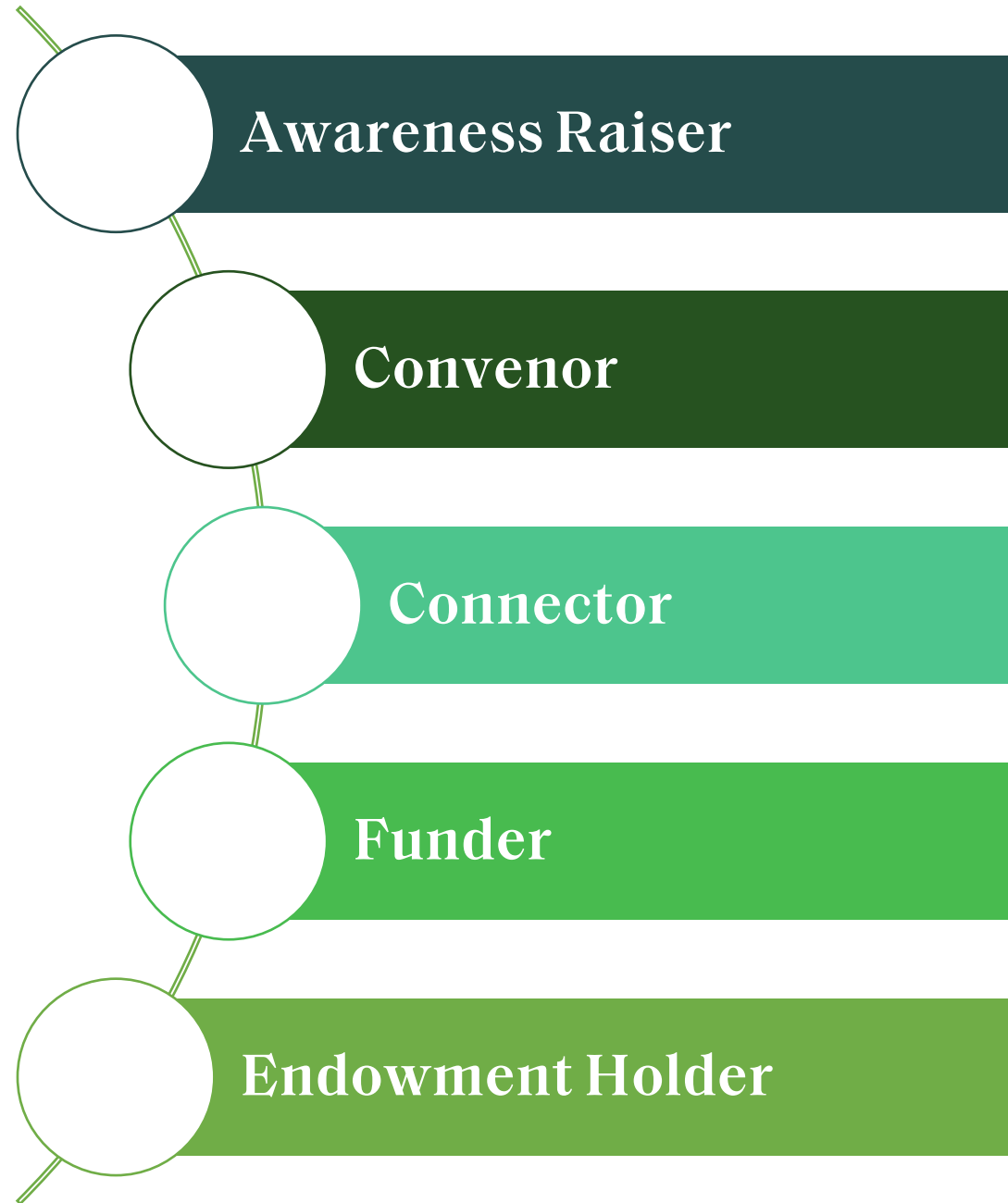
[Michigan Association of Counties: Opioid Settlement Resource Center](#)

[Michigan Department of Attorney General: Opioid Settlement Agreements and Payment Estimator](#)

[Johns Hopkins Bloomberg School of Public Health: Principles for the Use of Funds From the Opioid Litigation](#)

[Michigan Department of Health and Human Services: Opioid Settlements Website](#)

# Community Foundation Roles & Strengths



# Possible Roles for a Community Foundation

## Awareness Raiser

e.g., communicate to their partners and/or the public information, such as how the money is being spent, how organizations can access funds or share input, and where to learn more.

# Possible Roles for a Community Foundation

## Convenor

e.g., convene community members, nonprofits, funders, government, and/or other stakeholders to increase opportunities for engagement, listening, and feedback regarding needs and plans.

# Possible Roles for a Community Foundation

## Connector

e.g., connect folks doing work in the opioid space, like local community leaders, nonprofit partners, funders, and government agencies, to broaden networks and increase knowledge of what others are already doing in this space.



# Possible Roles for a Community Foundation

## Funder

e.g., assist with developing and managing requests for proposals or hold pooled funds from multiple entities (e.g., counties, cities, townships, foundations, etc.) for joint work on a collaborative project.

# Possible Roles for a Community Foundation

## Endowment Holder

e.g., share opportunities for and hold endowments to complement immediate allocations and ensure long-term investment in evidence-based programs and strategies.

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## How to approach a community foundation?

# Connect with a Community Foundation

## Suggested tips:

- Reach out for a conversation early in the process
- Explore capacity, staffing, interest, and options
- Recommend involving program and leadership at a CF
- Staff sizes vary significantly – from a one person shop to dozens of staff.
- Fund types and offerings vary from CF to CF
- Other local key institutions and nonprofits that could also be potential partners; this is our wheelhouse.

# Connect with a Community Foundation

- Albion Community Foundation
- Allegan County Community Foundation
- Ann Arbor Area Community Foundation
- Baraga County Community Foundation
- Barry Community Foundation
- Battle Creek Community Foundation
- Bay Area Community Foundation
- Berrien Community Foundation, Inc.
- Branch County Community Foundation, Inc.
- Cadillac Area Community Foundation
- Canton Community Foundation / Local Impact Alliance
- Capital Region Community Foundation
- Charlevoix County Community Foundation
- Chippewa County Community Foundation
- Community Foundation for Muskegon County
- Community Foundation for Northeast Michigan
- Community Foundation for Southeast Michigan

# Connect with a Community Foundation

- Community Foundation of Greater Flint
- Community Foundation of Greater Rochester
- Community Foundation of Marquette County
- Community Foundation of Monroe County
- Community Foundation of St. Clair County
- Community Foundation of the Holland-Zeeland Area
- Community Foundation of the Upper Peninsula
- Dickinson Area Community Foundation
- Four County Community Foundation
- Frankenmuth Community Foundation
- Fremont Area Community Foundation
- Grand Haven Area Community Foundation
- Grand Rapids Community Foundation
- Grand Traverse Regional Community Foundation
- Gratiot County Community Foundation
- Greenville Area Community Foundation
- Hillsdale County Community Foundation

# Connect with a Community Foundation

- Huron County Community Foundation
- Jackson County Community Foundation
- Kalamazoo Community Foundation
- Keweenaw Community Foundation
- Lapeer County Community Foundation
- Leelanau Township Foundation
- Lenawee Community Foundation
- Livonia Community Foundation
- M & M Area Community Foundation
- Mackinac Island Community Foundation
- Manistee County Community Foundation
- Marshall Community Foundation
- Michigan Gateway Community Foundation
- Midland Area Community Foundation
- Mt. Pleasant Area Community Foundation
- Oceana Community Foundation

# Connect with a Community Foundation

- Otsego Community Foundation
- Petoskey-Harbor Springs Area Community Foundation
- Roscommon County Community Foundation
- Saginaw Community Foundation
- Sanilac County Community Foundation
- Shelby Community Foundation
- Shiawassee Community Foundation
- South Haven Area Community Foundation
- Sturgis Area Community Foundation
- Three Rivers Area Community Foundation
- Tuscola County Community Foundation

## **Council of Michigan Foundations:**

[michiganfoundations.org/directory](https://michiganfoundations.org/directory)

## **The Grantsmanship Center:**

[tgci.com/funding-sources/MI/community](https://tgci.com/funding-sources/MI/community)



# Thank you!

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PARTNERSHIP**  

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