

2013 ANNUAL REPORT

T O W A R D  
**SUSTAIN  
ABILITY**

Helping communities engage with and  
protect the environment



CHARLES STEWART  
MOTT FOUNDATION®

*ON THE COVER: Clean energy solutions at the community level are among the kind of practical approaches to sustainability that the Charles Stewart Mott Foundation is exploring through our environmental grantmaking. Pictured here: Wind power in Michigan's Saginaw Bay region.*

*The Charles Stewart Mott Foundation's 2013 Annual Report features photography by Adam Stoltman. Unless otherwise noted, all photos are his.*



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# NEW WORK HAS DEEP ROOTS

Mott Foundation Chairman, President & CEO William S. White describes how the Foundation's newest environment work builds on decades of exploration and learning.

*Tranquil forests and other gifts of nature are protected for future generations to enjoy at Arcadia Dunes: The C.S. Mott Nature Preserve.*



There are compelling reasons to focus the Mott Foundation's 2013 annual report on our long-standing interest in — and commitment to — the environment. Not the least of these is our work on a new plan that adds an important and exciting interest area to our environmental work — advancing climate change solutions.

Before diving into the details of that plan, I think it's both important and useful to take a brief look back at the grantmaking and learning that have brought us to this new stage.

We formally launched our environmental grantmaking program more than three decades ago, and, for roughly the past 15 years, we've focused primarily on two interest areas: protecting freshwater ecosystems in the United States, particularly in the Great Lakes region, and reforming public investment practices in the developing world to protect the environment and affected communities. In each case, our fundamental goal has been to help people participate in the decisions, processes and activities that impact the environments in which they live, learn, work and play — environments that shape their quality of life.

2013 witnessed several historical milestones in this work. For example, the year marked a decade since the Grand Traverse Regional Land Conservancy purchased nearly 6,000 acres in the northwest region of Michigan's Lower Peninsula with the help of nearly \$8 million in grants from Mott. More than half of that land became Arcadia Dunes: The C.S. Mott Nature Preserve, which today features pristine sand dunes, forests, grassland and two miles of shoreline along Lake Michigan. It attracts a multitude of nature- and recreation-lovers each year and is becoming a cornerstone of economic development in that part of



*View looking across the shore of Lake Michigan toward Old Baldy, a sand dune popular among hikers, photographers and other visitors to Arcadia Dunes: The C.S. Mott Nature Preserve.*

Michigan. The project also reflects the growing role of land trusts in preserving and protecting the state's most precious natural resources.

The year also marked the five-year anniversary of the Great Lakes–St. Lawrence River Basin Water Resources Compact, commonly referred to as the Great Lakes Compact. Passed in 2008, this landmark interstate compact was informed by a decade of diligent work by Mott grantees and others. It set a first-of-its-kind legal framework for making decisions about how to manage water resources in the basin, how much water from the Great Lakes can be used, and how far away it can be used. The compact remains central to framing those discussions today.





*A member of the Mundurukú tribe stands in front of the Belo Monte hydropower dam under construction in the Brazilian Amazon. Such development projects can pose environmental and social risks for local communities.*

On the international front, 2013 marked a quarter century of the Foundation's grantmaking related to improving the social and environmental accountability of those investing in large-scale infrastructure and other projects in developing countries. Mott grantees remain at the forefront of this vital work, striving to ensure that such projects incorporate responsible policies and practices that help to alleviate poverty, enhance the well-being of communities and support healthy, natural environments.

Woven throughout these examples and, in fact, all of the Foundation's grantmaking programs is a commitment to helping people, organizations and communities engage, connect and work together in practical ways to achieve multiple benefits.

Our 2013 support to The Nature Conservancy (TNC) illustrates this approach. A longtime Mott grantee, TNC is leading a collaborative effort among partners working with the agricultural community in the Saginaw Bay Watershed. Those partners, which also include Michigan State University, are helping area farmers explore and voluntarily adopt environmentally friendly land use practices that will help strengthen their economic bottom lines while improving

water quality and restoring freshwater habitat in the watershed and Lake Huron.

A focus on multiple benefits also is evident in our support during 2013 to Forward Works in China and the Brazilian Institute of Social and Economic Analysis. Both organizations are engaging the international banking and environmental sectors to ensure that energy and infrastructure projects funded by their respective countries in developing regions around the world respect and protect the environment; improve access to sustainable energy, especially among poor families; and reflect the voices of those living in the projects' shadows.

It's worth noting that, while we're now working in what many call the "modern environmental era," our roots in environmental issues stretch back to the Foundation's earliest days. In fact, 2013 also marked the 85th anniversary of our first funding in the field. In 1928, Mott made a \$500 grant — equivalent to nearly \$7,000 today, adjusted for inflation — to the University of Michigan. The funds supported an expedition by researchers using balloons and kites to study air circulation patterns on the Greenland ice sheet.

While I've barely scratched the surface regarding Mott's long-standing support for environmental issues, what's important to understand is how our prior work has helped to shape our new program plan, including our added focus on advancing climate change solutions. It has taught us that this grantmaking must seek practical ways to simultaneously build strong economic, environmental and social conditions for all people — in a word, "sustainability."

The new plan, which was formally adopted by the Foundation's Board of Trustees in September 2014, uses this frame to strengthen, refine and expand our commitments in ways we believe have significant potential for advancing sustainability efforts here in the United States and around the world.

The core of our work in the United States remains focused on addressing what we call the freshwater challenge: securing sustainable levels of clean water to support both people and the



environment. We place special emphasis on the Great Lakes region — not only because the shores of our home state of Michigan touch four of the five Great Lakes, but also because the Great Lakes are the single largest system of surface freshwater on Earth. As such, they affect the physical, social and economic well-being of tens of millions of people in and beyond the region.

To make progress toward our goal, we'll work to strengthen the community of nongovernmental organizations dedicated to the long-term conservation of freshwater ecosystems. We also will seek to inform and advance well-designed and effectively implemented water-quality and water-quantity policies that conserve freshwater resources. While this isn't new work for Mott, we anticipate that we will fund more work in this area than we have in the past.

Our new program plan also points to a refreshed focus in our support related to development finance. As emerging economies such as Brazil and China are becoming donor countries, and as their national banks are becoming major lenders for developing countries, Mott's goal of transforming development finance is more salient than ever. We will fund organizations working to shape international investment in ways that support sustainable development and economic opportunity, especially in poor communities, and reduce harm to the environment.

As I indicated earlier, our environmental grantmaking will move forward with an exciting new focus — advancing climate change solutions.

Research<sup>1</sup> suggests that, by 2099, rising annual temperatures could make summers in our home state of Michigan more akin to those in present-day Oklahoma. If this were to occur, it would have significant implications for virtually every aspect of life in the state. The health of native ecosystems, especially those dependent on cold water rivers and streams, would be threatened. Water levels of the Great Lakes, which are so vital to the region's quality of life and economic well-being, could change — possibly in dramatic and unpredictable ways. And key industries, such as agriculture and forestry, would face daunting new challenges as certain crops and trees no longer thrive,

and new plants and animals — some welcome and some otherwise — become viable.

Every continent, country and community around the world faces its own unique challenges as our climate continues to evolve. Some might be tempted to discount the impacts as being far into the future, pointing to other pressing concerns that need immediate attention. The Mott Foundation seeks to help address many of those concerns — poverty, education and citizen participation, to name a few — through our environment and other grantmaking programs.

But the global community cannot set aside the environmental challenges that coincide with our changing climate and expect to deal with them later. Instead, we must collectively ramp up our responses to their signs, symptoms and underlying causes. Waiting to take action will simply pass along problems to our children and grandchildren — and, for them, it may be too late.

That said, the picture is not all “doom and gloom.” In fact, while the above concerns are very real, so are the opportunities for addressing



PHOTO CREDIT: JOERG BOETHLING / ALAMY

*Improving access to clean, renewable sources of energy will help rural communities in Africa, Asia and South America improve their quality of life and address climate change.*

<sup>1</sup>U.S. Global Change Research Program (2009). *Global Climate Change Impacts in the United States*.



them. To that end, our grantmaking in this area will support practical, innovative and solutions-based approaches to helping people and communities respond to the impacts of climate change.

Specifically, we have two objectives for this work: increasing access to clean energy in developing countries and stimulating clean energy use in our home state of Michigan. Although these objectives will play out in different parts of the world, both aim to support individuals and organizations that will do the hard work of delivering clean energy solutions at the community level.

In the international context, this will mean supporting organizations working to remove financial and policy barriers standing in the way of clean energy access, as well as organizations providing technical assistance at the local level to help communities take full advantage of the resulting opportunities. Similarly, in Michigan, we'll support organizations providing technical assistance to early adopters of energy efficiency and renewable energy technologies, and help link these organizations so that the sum of their efforts is much greater than the parts.

It's important to reiterate that our decision to add this new area of work was anything but sudden. For years, we've studied findings from the environmental field, including research conducted by our own grantees, about the challenges and opportunities related to climate change and renewable energy sources. Our staff and Trustees gave long and careful study to the proposed strategies and intended outcomes of the new grantmaking area, and their fit with our institutional values and goals. We asked each other tough questions, probed for more information and went back to the proverbial drawing board. It was my late wife, Claire, granddaughter of our founder and a Trustee of the organization for 16 years, who posed the simplest, most compelling question: What happens if we fail to act?

In the end, we concluded that adopting a formal approach to advancing climate change solutions is a natural evolution in our environmental grantmaking. In fact, I've come to characterize it as the

critical third "leg" of the stool that is our environmental program, with the lessons and strategies generated by the individual components helping to shape and guide work across the overall program.

Likewise, our environmental activities will continue to inform — and be informed by — work across Mott's other grantmaking areas: Civil Society, Flint Area and Pathways Out of Poverty. And that collective body of work will help provide the tools, models and insights to others working on issues of environmental protection, poverty alleviation and citizen engagement — indeed, the spectrum of sustainability.

Of course, we aren't suggesting Mott's new Environment program plan has all the answers related to climate change or other issues of sustainability. If the work were that easy, it certainly would have been done already.

Instead, it offers new and exciting opportunities to explore, test and implement strategies that can help balance concerns for the world's natural resources with impacts on people, communities and businesses.

In a nutshell: It's an approach we believe makes good sense.

In the pages that follow, as well as on our website, you'll find examples of Mott-funded efforts, including those described earlier in this message, that reflect our evolving work related to freshwater ecosystems and sustainable development. We look forward to future opportunities to share with you the stories, findings and lessons that emerge under our new environment grantmaking plan and that continue to help nurture a truly sustainable global community.

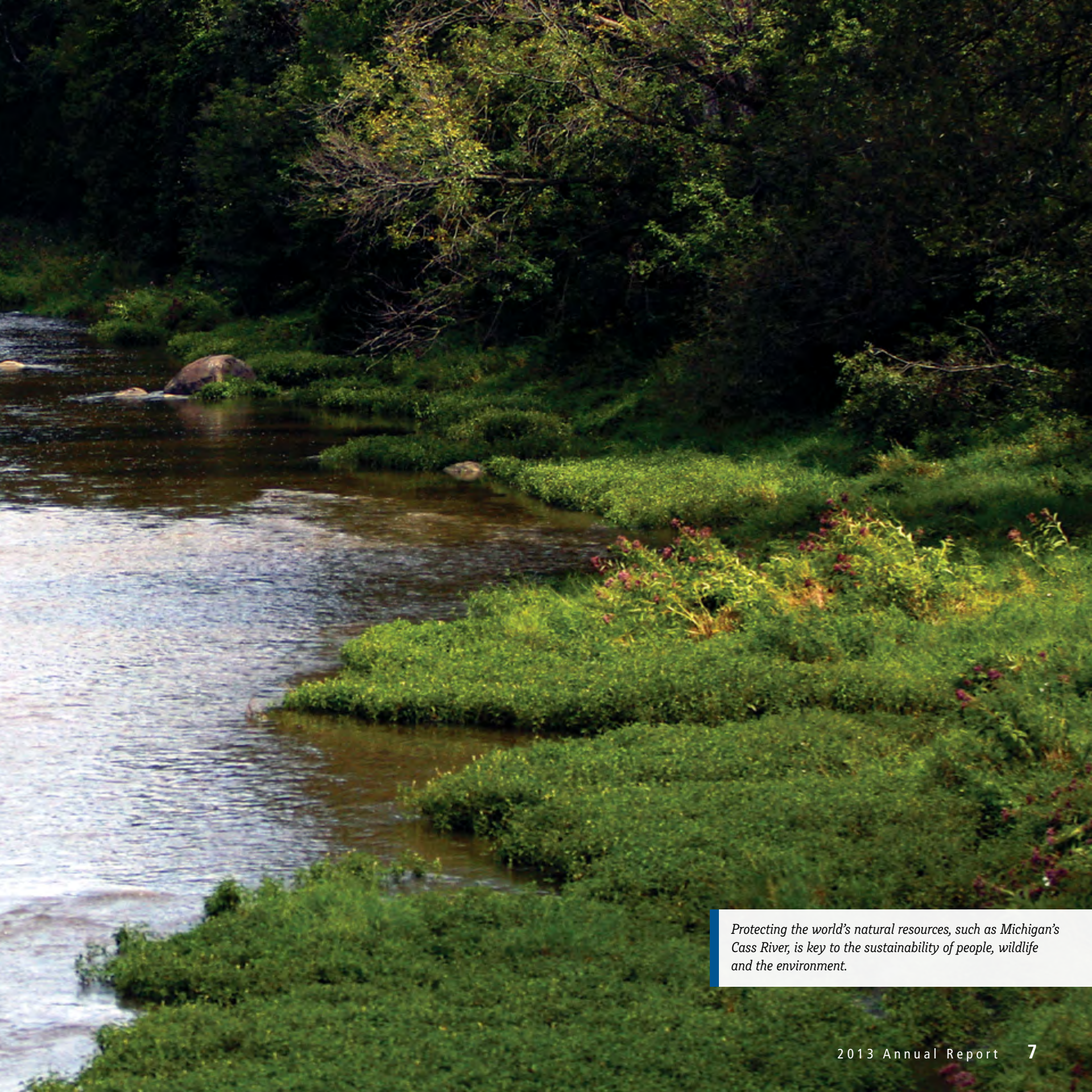


PHOTO CREDIT: SANTA FABIO

A handwritten signature in black ink, appearing to read "William S. White".

**William S. White,**  
*Chairman, President & CEO*





*Protecting the world's natural resources, such as Michigan's Cass River, is key to the sustainability of people, wildlife and the environment.*



# TOWARD SUSTAINABILITY

Profiles of Mott's environment work in 2013 illustrate the importance of helping people, organizations, communities and countries work together to advance ecological sustainability.

*Cloudscape, Michigan's Lower Peninsula.*



“Nature is a pretty good teacher of many things.” This simple sentiment reflects the high regard Charles Stewart Mott held for the natural world throughout his life.

An outdoorsman, farmer and conservationist, Mr. Mott was among the earliest private philanthropists in the United States to support environmental activities through formal grantmaking. Indeed, a 1928 Mott Foundation grant to the University of Michigan supported a Greenland expedition to observe meteorological patterns in the polar region.

Eighty-five years later, the Mott Foundation’s belief in the value of the natural world remained evident in our work. In 2013, our Environment Program, which

was formally launched more than three decades earlier, provided ongoing support for the stewardship of land and freshwater resources, particularly in and around our home state of Michigan. We also funded efforts to ensure that international investments in large-scale development projects, especially those related to energy and infrastructure, promote sustainability for people and the environment.

In the pages that follow are five brief stories about this grantmaking. Each reflects an ongoing journey of exploring and sharing practical approaches to environmental issues, and the continuous learning that has informed and shaped our grantmaking.

As we reflect on our work in 2013, we are reminded of the importance of taking the long view in helping to build sustainability at the community level. Glen Chown, executive director of the Grand Traverse Regional Land Conservancy, made this point eloquently in speaking about the Coastal Campaign, a successful effort funded in part by Mott to protect land in Michigan’s Lower Peninsula.

“Our goal was to put everything we had into the effort, and to advance the stewardship ethic for generations to come,” said Chown. “There are many more chapters to this book, and it’s a story that will continue to unfold in the years to come.”



■ The Mott Foundation supports the protection and restoration of the Great Lakes ecosystem. Pictured here: Coastal sand dunes in Michigan’s Lower Peninsula.



# CREATING CONNECTIONS TO PRESERVE NATURAL PLACES

A decade after Mott helped launch efforts to protect land in Michigan's Grand Traverse region, 6,000 acres of farms and undeveloped parcels are contributing to the area's economic future.



*A sign welcomes visitors to Arcadia Dunes: The C.S. Mott Nature Preserve, home to 3,600 acres of pristine coastline, sand dunes, grassland and forests.*



Arriving at the top of Old Baldy, a nearly 400-foot-high sand dune located on the northwest coast of Michigan's Lower Peninsula, visitors are rewarded with stunning views of distant grasslands, dense forests and the white-capped waters of Lake Michigan.

Perhaps few are aware that, in early 2003, these pristine surroundings, which have long provided habitat to migratory birds, Monarch butterflies, and many rare and endangered plants, were targeted for private development.

"Plans included putting in hundreds of homes and turning the top of Baldy into the seventh-hole sand trap of a new golf course," recalls Glen Chown, executive director of the Grand Traverse Regional Land Conservancy, a longtime Mott Foundation grantee.



Farmer Brian Putney (left) and Victor Lane of the Grand Traverse Regional Land Conservancy examine a map of area farms that are protected by the Conservancy's Coastal Campaign from competing forms of development.



“We were in danger of losing what was arguably one of the most environmentally significant properties on the Lake Michigan coast.”

In October 2003, the Conservancy, armed with \$16 million in support from private donors and the foundation community, including a commitment of nearly \$8 million in grants from Mott, formally kicked off its Coastal Campaign. This three-year, \$35 million initiative aimed to protect dozens of undeveloped parcels and working farms in the region, where the economy is closely tied to recreation, tourism and agriculture.

## ARCADIA DUNES: THE C.S. MOTT NATURE PRESERVE

3,600 Acres  
of natural habitat

15 Miles  
of trails

2 Miles  
of shoreline



Two months later and with additional funding from the community and a \$6 million interest-free loan from the Foundation, the Conservancy purchased 6,000 acres in the area. The parcel included land that, with Old Baldy as one of its crown jewels, became Arcadia Dunes: The C.S. Mott Nature Preserve.

Today, the Preserve’s 3,600 acres of natural habitat and 15 miles of carefully designed trails attract

visitors from around the country and beyond. Meanwhile, farmers have invested more than \$4 million in improving and planting 1,400 acres of nearby farmland that is now permanently protected from development.

Engaging allies across the region and helping them connect to the area’s natural assets have been key to building a base of support, says Chip May, executive director at nearby Camp Arcadia. Camp staff and guests often help the Conservancy construct and maintain the Preserve’s trails.

“When you’re out biking or working on the trails, with your sweat dripping into the ground, you connect with the land,” May explains. “When you’ve made that investment and understand how important the land is, you can’t help but want to protect it.”



*Chip May (center) pauses while mountain biking to speak with staff of the Grand Traverse Regional Land Conservancy and volunteers who had just completed work on a trail at Arcadia Dunes. May operates Camp Arcadia, and he and his campers often help maintain the trails.*





*Visitors enjoy the view of Lake Michigan from Old Baldy, a nearly 400-foot-high sand dune that once was targeted for private development.*





# CULTIVATING SUSTAINABILITY

Farmers are adopting strategies that benefit their bottom lines and the environment with help from a Mott-funded initiative in Michigan's Saginaw Bay region.

*View looking inland from Lake Huron's Saginaw Bay. Protecting the quality of water in the region contributes to healthy freshwater ecosystems in the larger Great Lakes Basin.*



When it comes to connecting economic and environmental concerns, many farmers “face a difficult push-pull situation,” says Mary Fales, who directs the Saginaw Bay Watershed Project for The Nature Conservancy (TNC).



*Ben Wickerham uses computer models to help farmers explore agricultural practices that are economically beneficial and environmentally sound. Wickerham is the watershed technician and coordinator for Michigan's Gratiot Conservation District.*

“On the one hand, they need to use agricultural practices that keep them profitable and allow them to provide for their families,” Fales explains. “On the other, they increasingly understand the negative, long-term impacts some practices can have on their farms and the environment.

“Our goal is to help them find the win-win strategies.”

TNC leads a collaborative effort to help farmers in this mid-Michigan watershed improve their bottom lines and the health of the region's freshwater ecosystems. The project draws upon field data and computerized modeling, the latter developed in partnership with Michigan State University, to help farmers select mutually beneficial approaches.



Such analysis informed the Zimba family's decision to create filter strips between their farm fields and neighboring drainage ditches in the community of Deford, located 22 miles southeast of the Saginaw Bay. By slowing storm water runoff, these narrow bands of perennial vegetation minimize costly field erosion and


help prevent nutrients and pesticides from entering the watershed and altering the natural ecosystem.

Farmers also are working with project partners to plant cover crops that minimize field erosion outside of the usual growing season, and to create or restore wetlands on unused farm fields. Such practices have the added benefit of providing valuable habitat for area wildlife, including bees and other pollinating species that benefit agriculture.

By documenting these efforts on the project website, farmers and conservationists will help inform similar models around the Great Lakes region — and possibly around the world, notes Fales.

The project also is demonstrating the value of building trust and forging relationships between the agricultural and environmental communities, says Joe Kautz, administrator for the Sanilac Conservation District, one of the project's partner agencies.

"We may approach the work from different starting points, but at the end of the day we're all trying to protect the natural resources and way of life in the watershed."



Filter strips, such as this goldenrod next to a corn crop, help to reduce erosion and keep agricultural by-products from entering nearby ditches and waterways.

*"On the one hand, they need to use agricultural practices that keep them profitable and allow them to provide for their families. On the other, they increasingly understand the negative, long-term impacts some practices can have on their farms and the environment."* **MARY FALES**, *The Nature Conservancy*





*Jim Kratz (left), administrator for Michigan's Tuscola County Conservation District, and farmer Ben Zimba are working together to protect the area's freshwater resources and ensure the Zimba family's farmland remains viable for generations to come.*




A satellite photograph of the Great Lakes Basin, showing the five major lakes (Superior, Michigan, Huron, Erie, and Ontario) and the surrounding land. The land is covered in dense green forests, with some urban areas and roads visible. The water is a deep blue color. The title is overlaid on the top left of the image.

# PROTECTING FRESH WATER FOR FUTURE GENERATIONS

Five years after Mott grantees helped inform its landmark passage, the Great Lakes Compact is protecting the quality and quantity of water in the Great Lakes Basin.

*Satellite view of a section of the Great Lakes Basin. The basin is comprised of the five major lakes and numerous connected waterways, including smaller lakes, rivers, wetlands and aquifers.*



An aerial photograph showing a lush green landscape with a winding river or stream that flows into a larger body of water. The water is a deep blue, and the surrounding land is covered in dense green vegetation.

The well-being of communities in the Great Lakes Basin, home to roughly 90 percent of the available fresh surface water in the United States, is clearly and intimately tied to the health of those waterways, according to Joel Brammeier, president and CEO of the Chicago-based Alliance for the Great Lakes.

“The problem is that, as a society, we tend to treat water like a commodity that can simply be taken and used, with little thought about how it will be returned,” he says.

Depleting water faster than it can be naturally restored can lead to drained reservoirs; rising temperatures in lakes, rivers and streams; shifting shorelines; and increased concentrations of water pollution — all of which can dramatically affect people and wildlife.

Brammeier says one reason the interstate Great Lakes Compact “is so brilliant” is because it makes a clear connection between quality and quantity.

“It views the actual amount of water in the basin as being essential to a healthy and functioning regional ecosystem,” he explains.



*The Milwaukee skyline, viewed from Lake Michigan. Milwaukee residents are among the 35 million people who depend on the quality and quantity of water in the Great Lakes Basin.*



The eight-state compact, known formally as the Great Lakes–St. Lawrence River Basin Water Resources Compact, is a first-of-its-kind legal framework for deciding how to manage the basin’s freshwater resources, including how much water can be diverted and how far away it can be used. A nonbinding, parallel agreement exists with the Canadian provinces of Ontario and Quebec.

The compact was signed into federal law in October 2008 after a decade of diligent work by grassroots and policy groups, including the Alliance, the National Wildlife Federation (NWF) and other Mott grantees.

## THE GREAT LAKES



Subsequent efforts by the participating states and provinces to improve water management practices have varied, sparking “some innovative results,” says Marc Smith, policy director at NWF. For example, researchers in Michigan can now use a data-driven assessment tool to better understand how groundwater withdrawals near the state’s rivers and streams are likely to affect local fish populations.

The compact’s ban on new diversions of water outside the basin was first tested in 2013, when the city of Waukesha, Wisconsin, sought exception under a limited provision for communities straddling the basin’s geographic boundaries. Today, that proposal remains under consideration, and several Mott grantees are continuing their efforts to build the compact’s long-term strength and resilience.

Success, says Smith, is key to the basin’s future.

“Water is a way of life here. It shapes who we are as a people and, in many ways, drives our economic engines. That’s why we need to look at the Great Lakes with the clear value of protecting them.”



*A proposal by Waukesha, Wisconsin, located almost 17 miles inland from Milwaukee, is testing the Great Lakes Compact’s restriction on new diversions of water for use outside of the Great Lakes Basin.*



*“Water is a way of life here. It shapes who we are as a people and, in many ways, drives our economic engines. That’s why we need to look at the Great Lakes with the clear value of protecting them.”* **MARC SMITH**, National Wildlife Federation



*Fishermen on Michigan’s Platte River.*



# TRANSFORMING INVESTMENTS TO PROTECT PEOPLE AND PLACES

Promoting investment practices that ensure large-scale projects in South America also advance sustainability is central to the work of several Mott-funded organizations.

*A Xikrin woman and child near the Bacaja, a tributary of the Xingu River. When completed, the Belo Monte Dam will significantly decrease water flow here.*



Deep in the Amazon's Xingu Basin, construction is underway on Belo Monte, the world's third-largest hydroelectric dam. Financed primarily by Brazil's national development bank (Banco Nacional de Desenvolvimento Econômico e Social, or BNDES) at a price tag that could reach \$26 billion, the dam is expected to be operational by 2016. When it is, it will flood 128,000 acres of rainforest, change the flow of rivers and alter the lives of local people.

This troubling situation points to the need to balance the interests of those funding massive energy and infrastructure projects with the environmental, social and economic concerns of surrounding communities.

"Amazon countries, with ample access to strategic resources, often don't adequately consider that these resources are located in extremely environmentally and socially sensitive areas," says Maria Elena Rodriguez, coordinator at the Brazilian Institute for Social and Economic Analysis (Instituto Brasileiro de Análises Sociais e Econômicas, or IBASE). Such projects can disrupt and even destroy important and fragile ecosystems, with local communities suffering the brunt of the consequences, explains Rodriguez.

"They are removed from their native lands and watch their means of subsistence disappear without new sources of food or income," she says.

IBASE is one of several Mott-funded organizations that continued in 2013 to promote sustainable development finance in South America. It did so by building networks, engaging in public oversight of projects, and advocating on behalf of communities and the environment.



To drive the Belo Monte's turbines, the Xingu River will be diverted through an artificial reservoir, flooding fragile Amazonian rainforest and depleting water flow in the river's Big Bend.



Those efforts included launching dialogue between civil society organizations and BNDES representatives. The resulting discussions on transparency, governance, and social and environmental safeguards related to development finance have helped to improve the bank's public disclosures on project financing, says Alessandra Cardoso, policy advisor at the Brazilian Institute for Socioeconomic Studies (Instituto de Estudos Socioeconômicos).

Groups also worked to reverse processes and policies that, for the sake of attracting investment, actually weaken environmental and social safeguards, says Cesar Gamboa, executive director of Law, Environment and Natural Resources (Derecho, Ambiente y Recursos Naturales). Efforts included educating investors and political leaders about increased costs that can result from legal proceedings and negative press when a project fails to consider local needs.

"Environmental and social standards are not an external cost, but an additional investment for sustainable development, a key to generating profit on projects," Gamboa points out.

Improving public disclosure by BNDES and engaging the institution, while small steps, are helping transform the future of development finance, says Rodriguez.

"We view the work with BNDES as emblematic of cooperation and joint coordination of nongovernmental organizations and affected communities," she explains. "It also demonstrates the fundamental role of civil society organizations in providing public oversight and mitigation of the environmental and social impacts of these projects."

*The health of the Xingu River is key to sustaining the Juruna and other indigenous communities.*

***"Environmental and social standards are not an external cost, but an additional investment for sustainable development, a key to generating profit on projects."*** CESAR GAMBOA, Law, Environment and Natural Resources

PHOTO CREDIT: CHRISTIAN POIRER / AMAZON WATCH





*Aerial view of a section of the Nanay Tributary in the Amazon River Basin. The basin produces roughly 20 percent of the world's oxygen and is home to more than a third of all known animal species.*





# SHIFTING TOWARD SUSTAINABLE DEVELOPMENT

Mott grantees in China are working to shape the country's investments in overseas development projects to benefit people and the environment.

*The flow of water to San Rafael Falls, Ecuador's largest natural waterfall, will be diminished significantly by the Coca-Codo Sinclair hydroelectric dam.*



With one of the world's fastest-growing economies, including annual foreign investments estimated in the tens of billions of dollars, China has emerged as an influential player in the field of development finance.

Its unique position presents the country with both the opportunity and responsibility to examine how its overseas investments, particularly in major energy and infrastructure projects, affect people and the environment, says Yunwen Bai, director of the Climate and Finance Policy Center at the Greenovation Hub, a project of Forward Works.

"It is very important for China to build the link between global development and ecology, and to be a leader in instituting social and environmental standards," explains Bai. "Chinese nongovernmental organizations can help that process by promoting an inclusive and open discussion about the country's overseas investments and their impacts."

That's why the Greenovation Hub and several other initiatives that received Mott funding focused their 2013 efforts on building the capacity of nongovernmental organizations (NGOs) to seek improvements in China's international development finance practices.

For example, the Greenovation Hub helped launch conversations and connections between NGOs in China and South America regarding the Coca-Codo Sinclair Hydroelectric Project, a massive hydroelectric dam under construction on Ecuador's Coca River. Funded largely by the Export-Import Bank of China, the \$2.3 billion project is expected to significantly alter the Coca's

PHOTO CREDIT: LAKHESIS / SHUTTERSTOCK



*A village nestled along the Mekong River in the Lao People's Democratic Republic. Large-scale development projects, including some funded with Chinese support, have accelerated deforestation in the country.*



natural flow when the dam becomes operational in 2016. Critics believe this will devastate the river's ecosystems, including nearby San Rafael Falls, Ecuador's tallest waterfall and a popular tourist attraction.

The situation points to the important role of China's NGOs in identifying the environmental and social risks of such projects; bridging the gaps in communication

and understanding between Chinese financiers and local communities; and helping to identify sustainable alternatives, explains Michelle Chan, director of Economic Policy at the U.S. affiliate of the Friends of the Earth international network.

"China actually has some of the world's most progressive environmental banking regulations," says Chan. "When lending overseas, Chinese banks must ensure that their corporate borrowers comply not just with local laws, but with good international practice. Local NGOs can help that process."

It's no surprise that creating a cultural shift in one of the world's oldest civilizations has its challenges, says Sze Ping Lo, founder of the Greenovation Hub and currently CEO of World Wildlife Fund-China. At the same time, rethinking China's approach to overseas development finance may spark opportunities for the country to explore new frameworks for other environmental and social issues.

"We have seen in the last few years a very encouraging effort in China to look at how we can do better on issues of development finance," says Lo. "I think that shows how companies and policymakers can shift from being part of the problem to bringing in positive solutions."

PHOTO CREDIT: JEAN-BAPTISTE DODANE / ALAMY



Infrastructure projects, such as this roadway in Gabon, Africa, can present environmental and social risks for local communities.

*"It is very important for China to build the link between global development and ecology, and to be a leader in instituting social and environmental standards. Chinese nongovernmental organizations can help that process by promoting an inclusive and open discussion about the country's overseas investments and their impacts."*

**YUNWEN BAI**, *Climate and Finance Policy Center*



*“When lending overseas, Chinese banks must ensure that their corporate borrowers comply not just with local laws, but with good international practice. Local NGOs can help that process.”* **MICHELLE CHAN**, Friends of the Earth



Beijing Financial Street, China.



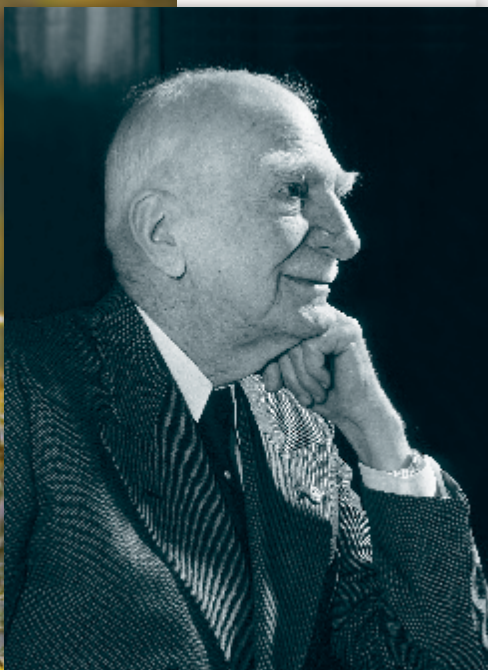






# FOUNDATION OVERVIEW





## OUR FOUNDER

*"It seems to me that every person, always, is in a kind of informal partnership with his community. His own success is dependent to a large degree on that community, and the community, after all, is the sum total of the individuals who make it up. The institutions of a community, in turn, are the means by which those individuals express their faith, their ideals and their concern for fellow men. ..."*

*"So broad and so deep are the objectives of the Mott Foundation that they touch almost every aspect of living, increasing the capacity for accomplishment, the appreciation of values and the understanding of the forces that make up the world we live in. In this sense, it may truly be called a Foundation for Living — with the ultimate aim of developing greater understanding among men."*

*"We recognize that our obligation to fellow men does not stop at the boundaries of the community. In an even larger sense, every man is in partnership with the rest of the human race in the eternal conquest which we call civilization."*

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Charles Stewart Mott (1875–1973), who established this Foundation in 1926, was deeply concerned from his earliest years in Flint, Michigan, with the welfare of his adopted community.

Soon after he had become one of the city's leading industrialists, this General Motors pioneer found a practical and successful way to express his interest. He served three terms as mayor (in 1912, 1913 and 1918) during a period when the swiftly growing city was beset with problems, with 40,000 people sharing facilities adequate for only 10,000.

As a private citizen, he started a medical and dental clinic for children and helped establish the Whaley Children's Center, as well as chapters of the YMCA and Boy Scouts, in Flint.

Nine years after the Foundation was incorporated for philanthropic, charitable and educational purposes, it became a major factor in the life of Flint through organized schoolground recreational activities, which developed into the nationwide community school/education program.

From this start, the Foundation's major concern has been the well-being of the community, including the individual, the family, the neighborhood and the systems of government. This interest has continued to find expression in Flint and also has taken the Foundation far beyond its home city, as the content of this annual report makes clear.



## OUR VALUES

Charles Stewart Mott's central belief in the partnership of humanity was the basis upon which the Foundation was established. While this remains the guiding principle of its grantmaking, the Foundation has refined and broadened its grantmaking over time to reflect changing national and world conditions.

Through its programs of Civil Society, Environment, Flint Area and Pathways Out of Poverty, and their more specific program areas, the Foundation seeks to fulfill its mission of supporting efforts that promote a just, equitable and sustainable society.

Inherent in all grantmaking is the desire to enhance the capacity of individuals, families or institutions at the local level and beyond. The Foundation hopes that its collective work in any program area will lead toward systemic change.

Fundamental to all Mott grantmaking are certain values:

- Nurturing strong, self-reliant individuals with expanded capacity for accomplishment;
- Learning how people can live together to create a sense of community, whether at the neighborhood level or as a global society;
- Building strong communities through collaboration to provide a basis for positive change;
- Encouraging responsible citizen participation to help foster social cohesion;
- Promoting the social, economic and political empowerment of all individuals and communities to preserve fundamental democratic principles and rights;
- Developing leadership to build upon the needs and values of people and to inspire the aspirations and potential of others; and
- Respecting the diversity of life to maintain a sustainable human and physical environment.

## OUR CODE OF ETHICS

- Respect for the communities we work with and serve.
- Integrity in our actions.
- Responsibility for our decisions and their consequences.

We are committed to:

- Acting honestly, truthfully and with integrity in all our transactions and dealings;
- Avoiding conflicts of interest;
- Appropriately handling actual or apparent conflicts of interest in our relationships;
- Treating our grantees fairly;
- Treating every individual with dignity and respect;
- Treating our employees with respect, fairness and good faith and providing conditions of employment that safeguard their rights and welfare;
- Being a good corporate citizen and complying with both the spirit and the letter of the law;
- Acting responsibly toward the communities in which we work and for the benefit of the communities that we serve;
- Being responsible, transparent and accountable for all of our actions; and
- Improving the accountability, transparency, ethical conduct and effectiveness of the nonprofit field.



## OUR WORK

**Our Vision:** The Charles Stewart Mott Foundation affirms its founder's vision of a world in which each of us is in partnership with the rest of the human race — where each individual's quality of life is connected to the well-being of the community, both locally and globally. We pursue this vision through creative grantmaking, thoughtful communication and other activities that enhance community in its many forms. The same vision of shared learning shapes our internal culture as we strive to maintain an ethic of respect, integrity and responsibility. The Foundation seeks to strengthen, in people and their organizations, what Mr. Mott called "the capacity for accomplishment."

**Our Mission:** To support efforts that promote a just, equitable and sustainable society.

### CIVIL SOCIETY

**Mission:** To strengthen philanthropy and the nonprofit sector as vital vehicles for increasing civic engagement and improving communities and societies.

**PROGRAM AREAS:**

- Central/Eastern Europe and Russia
- South Africa
- United States
- Global Philanthropy and Nonprofit Sector

### ENVIRONMENT

**Mission:** To support the efforts of an engaged citizenry working to create accountable and responsive institutions, sound public policies, and appropriate models of development that protect the diversity and integrity of selected ecosystems in North America and around the world.

**PROGRAM AREAS:**

- Conservation of Freshwater Ecosystems
- International Finance for Sustainability
- Special Initiatives

### FLINT AREA

**Mission:** To foster a well-functioning, connected community that is capable of meeting the economic, social and racial challenges ahead.

**PROGRAM AREAS:**

- Arts, Culture and Education
- Economic Revitalization
- Strengthening Community
- Special Initiatives

### PATHWAYS OUT OF POVERTY

**Mission:** To identify, test and help sustain pathways out of poverty for low-income people and communities.

**PROGRAM AREAS:**

- Improving Community Education
- Expanding Economic Opportunity
- Building Organized Communities
- Special Initiatives

### EXPLORATORY AND SPECIAL PROJECTS

**Mission:** To support unusual or unique opportunities addressing significant national and international problems. (*Proposals are by invitation only; unsolicited proposals are discouraged.*)

**PROGRAM AREAS:**

- Historically and Predominantly Black Colleges and Universities
- Special Projects





## **PROGRAMS & GRANTS**



# 2013 PROGRAM OVERVIEW: CIVIL SOCIETY

**Mission:** To strengthen philanthropy and the nonprofit sector as vital vehicles for increasing civic engagement and improving communities and societies.

## CENTRAL/EASTERN EUROPE AND RUSSIA

**Goal:** To foster a civil society in which nonprofits strengthen democratic values and practices and have access to adequate and responsive resources.

### OBJECTIVES/WHAT WE SEEK:

- **Active Civic Participation.** People and nonprofits empowered to take collective action that promotes and defends democratic values.
- **Philanthropy Development.** A more robust culture of private giving for public good.

## SOUTH AFRICA

**Goal:** To empower poor and marginalized communities to unlock resources and realize their development needs and aspirations.

### OBJECTIVES/WHAT WE SEEK:

- **Community Advice Office Sector.** Strong and sustainable community advice offices and related community-based organizations that assist poor and marginalized communities.
- **Philanthropy Development.** Increased philanthropy with improved responsiveness to the needs of poor and marginalized communities.
- **Special Opportunities.** Unique opportunities to strengthen civil society.

## UNITED STATES

**Goal:** To increase the nonprofit and philanthropic sector's responsiveness and capacity to address social and community needs.

### OBJECTIVES/WHAT WE SEEK:

- **Nonprofit Sector Responsiveness.** A robust infrastructure that protects and promotes a vibrant and responsive nonprofit sector and philanthropy.
- **Community Philanthropy.** Philanthropy that promotes vitality and resiliency in local communities.

## GLOBAL PHILANTHROPY AND NONPROFIT SECTOR

**Goal:** To foster global platforms for philanthropy and the nonprofit sector that respond to the needs of local communities.

### OBJECTIVES/WHAT WE SEEK:

- **Philanthropy and Nonprofit Sector.** Improved effectiveness of philanthropy and nonprofit support organizations through international collaboration and exchange of knowledge.
- **Special Opportunities.** Unique opportunities to strengthen civil society.

**Note:** The grant listings and charts within this report reflect the geographic sub-regions in which we make grants in Central/Eastern Europe and Russia.

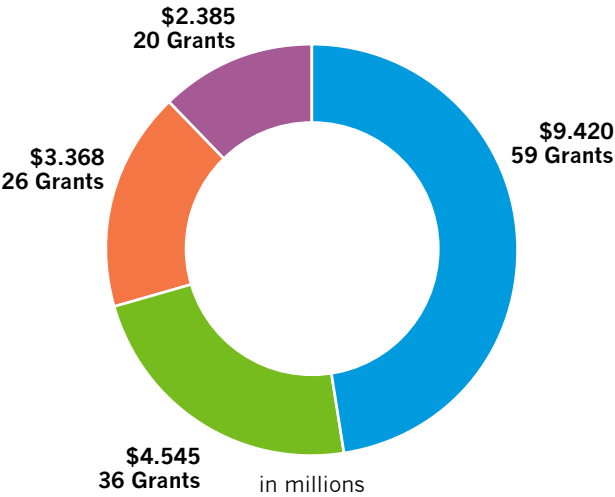




PHOTO CREDIT: BREAD HOUSES NETWORK

Residents of Stara Zagora, Bulgaria, gather at a bread house event. The bread house movement unites people from all walks of life through the simple act of baking. Organizers say bread houses enhance understanding among community members by sparking dialogue and bridging ethnic, cultural, racial, economic and religious divides.

# **GRANT ACTIVITY:** \$19,717,599 / 141GRANTS



## **CENTRAL/EASTERN EUROPE AND RUSSIA**

	GRANT DOLLARS (in millions)	NUMBER OF GRANTS
Southeast Europe	\$ 4.328	33
Western Former Soviet Union	\$ 2.613	17
CEE/Russia Regional	\$ 2.479	9

## **SOUTH AFRICA**

Community Advice Office Sector	\$ 2.546	16
Philanthropy Development	\$ 1.295	12
Special Opportunities	\$ .704	8

## **UNITED STATES**

Nonprofit Sector Responsiveness	\$ 1.993	17
Community Philanthropy	\$ .750	3
Special Opportunities	\$ .025	1
Racial and Ethnic Diversity in Philanthropy	\$ .600	5

## **GLOBAL PHILANTHROPY AND NONPROFIT SECTOR**

Philanthropy and Nonprofit Sector	\$ 2.076	17
Special Opportunities	\$ .309	3

<b>TOTALS</b>	<b>\$ 19.718</b>	<b>141</b>
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## CENTRAL/EASTERN EUROPE AND RUSSIA

### Southeast Europe

#### Ana and Vlade Divac Foundation

*Belgrade, Serbia*  
\$125,000 – 24 mos.  
Program and operational  
development support

#### Association for Community Relations

*Cluj-Napoca, Romania*  
\$450,000 – 24 mos.  
Community foundation  
development program

#### Balkan Investigative Reporting Network

*Sarajevo, Bosnia and Herzegovina*  
\$100,000 – 24 mos.  
General purposes

#### Balkan Investigative Reporting Network Kosovo

*Pristina, Kosovo*  
\$100,000 – 24 mos.  
General purposes

#### Bulgarian Donors' Forum

*Sofia, Bulgaria*  
\$120,000 – 36 mos.  
General purposes

#### Bulgarian Environmental Partnership Foundation

–\$76,074  
Adjustment to previous grant

#### Center for Civic Cooperation

*Livno, Bosnia and Herzegovina*  
\$60,000 – 24 mos.  
Increasing citizen participation in  
community life through media

#### Center for Cultural Decontamination

*Belgrade, Serbia*  
\$60,000 – 24 mos.  
Institutional capacity building

#### Centers for Civic Initiatives – Tuzla

*Tuzla, Bosnia and Herzegovina*  
\$100,000 – 24 mos.  
General purposes

#### Community Foundation Slagalice

*Osijek, Croatia*  
\$75,000 – 24 mos.  
General purposes

#### Community Volunteers Foundation

*Istanbul, Turkey*  
\$220,000 – 24 mos.  
YouthBank development in  
Turkey

#### Dimitar Berbatov Foundation

*Sofia, Bulgaria*  
\$100,000 – 24 mos.  
Institutional development

#### Diyarbakir Institute for Political and Social Research

*Yenisehir-Diyarbakir, Turkey*  
\$70,000 – 24 mos.  
Community-based restorative  
justice mechanisms in southeast  
Turkey

#### Documenta

*Zagreb, Croatia*  
\$155,000 – 24 mos.  
General purposes

#### FOL Movement

*Prishtina, Kosovo*  
\$60,000 – 24 mos.  
Strengthening capacity and  
outreach

#### Hrant Dink Foundation

*Istanbul, Turkey*  
\$100,000 – 24 mos.  
General purposes

#### Humanitarian Law Center

*Belgrade, Serbia*  
\$190,000 – 24 mos.  
General purposes

#### Ideas Factory Association

*Sofia, Bulgaria*  
\$160,000 – 24 mos.  
Hub for agents of social change

#### International Association 'Interactive Open Schools'

*Tuzla, Bosnia and Herzegovina*  
\$50,000 – 24 mos.  
General purposes

#### Mozaik Community Development Foundation

*Sarajevo, Bosnia and Herzegovina*  
\$220,000 – 24 mos.  
General purposes

#### National Alliance for Volunteer Action

*Plovdiv, Bulgaria*  
\$80,000 – 24 mos.  
Rebirth of volunteerism in  
Bulgaria

#### PACT – Partnership for Community Action and Transformation Foundation

*Bucharest, Romania*  
\$190,000 – 24 mos.  
General purposes

#### Princess Margarita of Romania Foundation – Romania

*Bucharest, Romania*  
\$140,000 – 24 mos.  
General purposes

#### Pro Vobis National Resource Center for Volunteering

*Cluj-Napoca, Romania*  
\$80,000 – 24 mos.  
General purposes

#### Reconstruction Women's Fund

*Belgrade, Serbia*  
\$90,000 – 24 mos.  
Institutional and program  
development support

#### Resource Center for Public Participation

*Bucharest, Romania*  
\$100,000 – 24 mos.  
General purposes

#### Romanian Federation of Community Foundations

*Cluj-Napoca, Romania*  
\$70,000 – 24 mos.  
General purposes

#### SENSE – Central European News Service Ltd.

*Zagreb, Croatia*  
\$60,000 – 24 mos.  
Local documentation centers in  
the Western Balkans

#### Third Sector Foundation of Turkey

*Karakoy, Turkey*  
\$200,000 – 24 mos.  
Philanthropy infrastructure  
development in Turkey

#### Trag Foundation

*Belgrade, Serbia*  
\$220,000 – 24 mos.  
General purposes

#### Women in Black

*Belgrade, Serbia*  
\$50,000 – 24 mos.  
Confronting the past in Serbia

#### Workshop for Civic Initiatives Foundation

*Sofia, Bulgaria*  
\$400,000 – 24 mos.  
Bulgarian community foundations  
development fund

#### Youth Initiative for Human Rights

*Belgrade, Serbia*  
\$140,000 – 24 mos.  
General purposes

#### Youth Initiative for Human Rights – Croatia

*Zagreb, Croatia*  
\$69,000 – 24 mos.  
General purposes

**Subtotal:** \$4,327,926  
Southeast Europe

## Western Former Soviet Union

#### Agency for Social Information

*Moscow, Russia*  
\$200,000 – 24 mos.  
Regional communication centers

#### Andrei Sakharov Foundation

*Moscow, Russia*  
\$194,000 – 24 mos.  
Development of multifunctional  
social center

#### Carnegie Endowment for International Peace

*Washington, DC*  
\$200,000 – 24 mos.  
Carnegie Moscow Center

#### Charities Aid Foundation

*London, England*  
\$40,000 – 24 mos.  
Community foundation  
development in Russia

#### Civic Analysis and Independent Research Center

*Perm, Russia*  
\$14,000 – 24 mos.  
Civil initiatives for public benefit  
support service

#### Civic Network OPORA

*Kyiv, Ukraine*  
\$100,000 – 24 mos.  
General purposes

#### GURT Resource Center for NGO Development

*Kyiv, Ukraine*  
\$100,000 – 36 mos.  
General purposes

#### Institute of Socio-Cultural Management

*Kirovohrad, Ukraine*  
\$100,000 – 24 mos.  
School of Civic Participation

#### Kherson Regional Charity and Health Foundation

*Kherson, Ukraine*  
\$100,000 – 24 mos.  
Community resource centers in  
Ukraine

#### Krasnoyarsk Center for Community Partnerships

*Krasnoyarsk, Russia*  
\$200,000 – 36 mos.  
General purposes

#### Legal Team

*Moscow, Russia*  
\$100,000 – 24 mos.  
Building legal capacity of  
nonprofit sector in Russia

#### LLC MEMO

*Moscow, Russia*  
\$200,000 – 24 mos.  
Development of human capital  
through social marketing



**New Eurasia Foundation**  
*Moscow, Russia*  
 \$600,000 – 24 mos.  
 Mainstreaming civic and community engagement into social development

**Nizhni Novgorod Voluntary Service**  
*Nizhni Novgorod, Russia*  
 \$150,000 – 24 mos.  
 TimeBank

**Russia Donors Forum**  
*Moscow, Russia*  
 \$35,000 – 36 mos.  
 General purposes

**Saint-Petersburg NGO Development Centre**  
*St. Petersburg, Russia*  
 \$100,000 – 24 mos.  
 General purposes

**Ukrainian Step by Step Foundation**  
*Kyiv, Ukraine*  
 \$180,000 – 36 mos.  
 Community development in Ukraine through community school programs

**Subtotal:** \$2,613,000  
 Western Former Soviet Union

## CEE/Russia Regional

**Academy for the Development of Philanthropy in Poland**  
*Warsaw, Poland*  
 \$600,000 – 36 mos.  
 Community foundation development fund

**CEE Bankwatch Network**  
*Prague, Czech Republic*  
 \$200,000 – 24 mos.  
 General purposes

**Center for Community Change**  
*Washington, DC*  
 \$46,000 – 20 mos.  
 Organizing training in Central/Eastern Europe

**ContinYou**  
 –\$110,000  
 Adjustment to previous grant

**Foundation-Administered Project**  
 \$103,863  
 Active civic participation  
 \$25,000  
 Assessing innovative approaches to civil society support  
 \$91,927  
 Community foundation development in Central/Eastern Europe and Russia  
 \$89,193  
 Philanthropy development in southeast Europe

**Fundacja TechSoup**  
*Warsaw, Poland*  
 \$400,000 – 24 mos.  
 Strengthening institutional capacity to provide information and communication technologies support to nongovernmental organizations in Central/Eastern Europe and Russia

**Funding Network**  
*London, England*  
 \$150,000 – 36 mos.  
 Developing the Funding Network in Central/Eastern Europe and Russia

**International Association 'Interactive Open Schools'**  
*Tuzla, Bosnia and Herzegovina*  
 \$181,000 – 24 mos.  
 Community schools quality partnership

**International Centre of Excellence for Community Schools**  
*Coventry, England*  
 \$110,000 – 8 mos.  
 General purposes

**Socia – Social Reform Foundation**  
 –\$131,049  
 Adjustment to previous grant

**VIA Foundation**  
*Prague, Czech Republic*  
 \$600,000 – 36 mos.  
 ViabilityNet – regional nongovernmental organization capacity-building program

**Zing Foundation**  
*Arlington, MA*  
 \$123,200 – 12 mos.  
 Promoting philanthropy in Central/Eastern Europe and Russia

**Subtotal:** \$2,479,134  
 CEE/Russia Regional

**Program Area Total:** \$9,420,060  
 Central/Eastern Europe and Russia

## SOUTH AFRICA

### Community Advice Office Sector

**Association of University Legal Aid Institutions Trust**  
*Potchefstroom, South Africa*  
 \$220,000 – 24 mos.  
 Advice office support project

**Black Sash Trust**  
*Cape Town, South Africa*  
 \$630,080 – 48 mos.  
 General purposes

**Centre for Community Justice and Development**  
*Pietermaritzburg, South Africa*  
 \$183,000 – 12 mos.  
 Advice office support

**Centre for Rural Legal Studies**  
*Stellenbosch, South Africa*  
 \$150,000 – 24 mos.  
 General purposes

**Community Law and Rural Development Centre**  
*Durban, South Africa*  
 \$100,000 – 12 mos.  
 Advice office training and support

**Democracy Development Programme**  
*Durban, South Africa*  
 \$120,000 – 24 mos.  
 Training local government councillors and communities in KwaZulu-Natal

**Education and Training Unit**  
*Johannesburg, South Africa*  
 \$80,000 – 24 mos.  
 Materials development and website management for paralegal training

**HIVOS – South Africa**  
*Johannesburg, South Africa*  
 \$200,000 – 24 mos.  
 Multiagency grants initiative: advice office re-granting project  
 \$158,000 – 12 mos.  
 Limpopo legal aid cluster

**Legal Resources Trust**  
*Johannesburg, South Africa*  
 \$100,000 – 24 mos.  
 Legal support services for nonprofit organizations

**National Alliance for the Development of Community Advice Offices**  
*Cape Town, South Africa*  
 \$30,000 – 6 mos.  
 Support to the Association of Community Advice Offices of South Africa

**ProBono.Org**  
*Johannesburg, South Africa*  
 \$75,000 – 24 mos.  
 Backup legal services for advice offices

**Project for Conflict Resolution and Development**  
*Port Elizabeth, South Africa*  
 \$50,000 – 12 mos.  
 Conflict resolution training for advice offices

**Trust for Community Outreach and Education**  
*Cape Town, South Africa*  
 \$200,000 – 24 mos.  
 General purposes

**Umtapo Centre**  
*Durban, South Africa*  
 \$150,000 – 24 mos.  
 General purposes

**University of the Western Cape**  
*Cape Town, South Africa*  
 \$100,000 – 24 mos.  
 Community law center – multilevel government initiative

**Subtotal:** \$2,546,080  
 Community Advice Office Sector

## Philanthropy Development

**Charities Aid Foundation Southern Africa**  
*Johannesburg, South Africa*  
 \$150,000 – 24 mos.  
 General purposes

**Community Chest of the Western Cape**  
*Cape Town, South Africa*  
 \$80,000 – 24 mos.  
 Capacity building

**DOCKDA Rural Development Agency**  
*Cape Town, South Africa*  
 \$120,000 – 24 mos.  
 General purposes

**Foundation for Human Rights**  
*Johannesburg, South Africa*  
 \$150,000 – 24 mos.  
 General purposes

**GreaterGood South Africa**  
*Cape Town, South Africa*  
 \$20,000 – 12 mos.  
 General purposes

**Pitseng Trust**  
*Johannesburg, South Africa*  
 \$75,000 – 12 mos.  
 General purposes

**South African Institute for Advancement**  
*Cape Town, South Africa*  
 \$160,000 – 24 mos.  
 Nonprofit clinic project

**Southern African Community Grantmakers Leadership Forum**  
*Cape Town, South Africa*  
 \$50,000 – 24 mos.  
 General purposes

**Tides Center**  
*San Francisco, CA*  
 \$100,000 – 24 mos.  
 Africa grantmakers' affinity group

**Uthungulu Community Foundation**  
*Richards Bay, South Africa*  
 \$120,000 – 24 mos.  
 General purposes



**West Coast Community Foundation**

*Cape Town, South Africa*  
\$150,000 – 24 mos.  
General purposes

**Women's Hope, Education and Training Trust**

*Cape Town, South Africa*  
\$120,000 – 24 mos.  
General purposes

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**Subtotal:** \$1,295,000  
Philanthropy Development

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**Special Opportunities****Community Development Resource Association**

*Cape Town, South Africa*  
\$75,000 – 12 mos.  
General purposes

**Constitutional Court Trust**

*Johannesburg, South Africa*  
\$25,000 – 28 mos.  
Creating an audible legacy

**Desmond Tutu Peace Centre**

–\$50,000

**Foundation-Administered Project**

\$68,993  
Learning and sharing sessions

**Gordon Institute of Business Science**

*Johannesburg, South Africa*  
\$75,000 – 24 mos.  
Support for social entrepreneurship program

**Institute for Healing of Memories**

*Cape Town, South Africa*  
\$60,000 – 12 mos.  
General purposes

**Promises Films**

*San Francisco, CA*  
\$50,000 – 12 mos.  
Breaking the Rules – film project

**SGS Consulting**

*Johannesburg, South Africa*  
\$200,000 – 13 mos.  
Technical support and dialogue platform

**Social Surveys**

*Johannesburg, South Africa*  
\$50,000 – 18 mos.  
Towards a better understanding of civil society in Africa

**Southern African NGO Network**

*Braamfontein, South Africa*  
\$150,000 – 24 mos.  
NGO Pulse and Prodder

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**Subtotal:** \$703,993  
Special Opportunities

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**Program Area Total:** \$4,545,073  
South Africa

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**UNITED STATES****Nonprofit Sector Responsiveness****Aspen Institute**

*Washington, DC*  
\$100,000 – 24 mos.  
Nonprofit data project

**Association for Research on Nonprofit Organizations & Voluntary Action**

*Indianapolis, IN*  
\$60,000 – 36 mos.  
General purposes

**BoardSource**

*Washington, DC*  
\$200,000 – 24 mos.  
General purposes

**Center for Effective Philanthropy**

*Cambridge, MA*  
\$50,000 – 6 mos.  
Conference sponsorship

**Columbia University in the City of New York**

*New York, NY*  
\$200,000 – 24 mos.  
Oversight and regulation of charitable organizations

**Communications Network**

*Naperville, IL*  
\$30,000 – 36 mos.  
General purposes

**Council of Michigan Foundations**

*Grand Haven, MI*  
\$220,000 – 24 mos.  
General purposes

**Council on Foundations**

*Arlington, VA*  
\$200,000 – 24 mos.  
General purposes

**Forum of Regional Associations of Grantmakers**

*Arlington, VA*  
\$100,000 – 24 mos.  
General purposes

**Foundation Center**

*New York, NY*  
\$150,000 – 24 mos.  
General purposes

**Foundation-Administered Project**

\$150,570  
Office of Foundation Liaison

**Grand Valley State University**

*Allendale, MI*  
\$100,000 – 18 mos.  
LearnPhilanthropy

**Grants Managers Network**

*Washington, DC*  
\$22,000 – 36 mos.  
General purposes

**GuideStar**

*Williamsburg, VA*  
\$50,000 – 24 mos.  
General purposes

**National Center for Family Philanthropy**

*Washington, DC*  
\$200,000 – 24 mos.  
General purposes

**National Center on Philanthropy and the Law**

*New York, NY*  
\$100,000 – 24 mos.  
General purposes

**Philanthropy Roundtable**

*Washington, DC*  
\$60,000 – 24 mos.  
General purposes

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**Subtotal:** \$1,992,570  
Nonprofit Sector Responsiveness

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**Community Philanthropy****CFLeads**

*Kansas City, MO*  
\$250,000 – 24 mos.  
Cultivating community engagement

**Foundation-Administered Project**

\$100,000  
Mott Community Foundation centennial microsite

**Indiana University**

*Indianapolis, IN*  
\$300,000 – 12 mos.  
C.S. Mott Foundation Community Philanthropy Chair

**Monitor Deloitte**

*San Francisco, CA*  
\$100,000 – 10 mos.  
What's Next for Community Philanthropy

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**Subtotal:** \$750,000  
Community Philanthropy

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**Special Opportunities****Arab Community Center for Economic and Social Services**

*Dearborn, MI*  
\$25,000 – 12 mos.  
Center for Arab American Philanthropy endowment fund

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**Subtotal:** \$25,000  
Special Opportunities

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**Racial and Ethnic Diversity in Philanthropy****Asian Americans/Pacific Islanders in Philanthropy**

*San Francisco, CA*  
\$90,000 – 36 mos.  
General purposes

**Association of Black Foundation Executives**

*New York, NY*  
\$150,000 – 36 mos.  
General purposes

**Council of Michigan Foundations**

*Grand Haven, MI*  
\$150,000 – 12 mos.  
Transforming Michigan philanthropy through diversity and inclusion

**Hispanics in Philanthropy**

*Oakland, CA*  
\$120,000 – 36 mos.  
General purposes

**Native Americans in Philanthropy**

*Minneapolis, MN*  
\$90,000 – 36 mos.  
General purposes

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**Subtotal:** \$600,000  
Racial and Ethnic Diversity in Philanthropy

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**Program Area Total:** \$3,367,570  
United States

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## GLOBAL PHILANTHROPY AND NONPROFIT SECTOR

### Philanthropy and Nonprofit Sector

#### Alliance Publishing Trust *London, England*

\$30,000 – 16 mos.  
Developing philanthropy in  
emerging markets

\$100,000 – 24 mos.  
General purposes

#### CIVICUS: World Alliance for Citizen Participation

*Washington, DC*  
\$80,000 – 12 mos.  
General purposes

#### Community Foundations of Canada

*Ottawa, Ontario*  
\$36,000 – 6 mos.  
Global participation in  
Community Foundations of  
Canada conference

#### European Foundation Centre *Brussels, Belgium*

\$160,000 – 12 mos.  
General purposes  
\$150,000 – 18 mos.  
Philanthropy House

#### Foundation-Administered Project

\$49,896  
Global community philanthropy  
development

#### Global Fund for Community Foundations

*Johannesburg, South Africa*  
\$250,000 – 12 mos.  
Small grants and capacity-  
building program

\$175,000 – 15 mos.  
Global Alliance for Community  
Philanthropy secretariat

#### Hudson Institute

*Washington, DC*  
\$100,000 – 24 mos.  
Index of Philanthropic Freedom

#### London Community Foundation

*London, England*  
\$50,000 – 12 mos.  
Developing the London  
Community Foundation

#### Network of European Foundations

*Brussels, Belgium*  
\$28,000 – 12 mos.  
Membership and administrative  
support

#### Research Foundation of the City University of New York

*New York, NY*  
\$42,000 – 24 mos.  
International community  
foundation fellows program

#### Southern Africa Trust

*Midrand, South Africa*  
\$75,000 – 12 mos.  
Africa Grantmakers Network

#### Stichting SBF

*Hague, Netherlands*  
\$150,000 – 36 mos.  
Community foundation  
development

#### Synergos Institute

*New York, NY*  
\$200,000 – 24 mos.  
Connecting global philanthropy  
to community philanthropy

#### Worldwide Initiatives for Grantmaker Support

*São Paulo, Brazil*  
\$400,000 – 24 mos.  
General purposes

<b>Subtotal:</b>	\$2,075,896
Philanthropy and Nonprofit Sector	

### Special Opportunities

#### International Academy for Innovative Pedagogy, Psychology and Economy gGmbH

*Berlin, Germany*  
\$174,000 – 12 mos.  
Youth empowerment partnership  
program

#### Madariaga College of Europe Foundation

*Brussels, Belgium*  
\$35,000 – 12 mos.  
Citizens' Europe program

#### Philanthropy Ireland

*Dublin, Ireland*  
\$100,000 – 132 mos.  
Ray Murphy memorial lecture  
series

<b>Subtotal:</b>	\$309,000
Special Opportunities	

<b>Program Area Total:</b>	\$2,384,896
Global Philanthropy and Nonprofit Sector	

<b>Program Total:</b>	\$19,717,599
Civil Society	



## 2013 PROGRAM OVERVIEW: ENVIRONMENT

**Mission:** To support the efforts of an engaged citizenry working to create accountable and responsive institutions, sound public policies, and appropriate models of development that protect the diversity and integrity of selected ecosystems in North America and around the world.

### ■ CONSERVATION OF FRESHWATER ECOSYSTEMS

**Goal:** To advance the conservation and restoration of freshwater ecosystems in North America, with emphasis on the Great Lakes and, to a lesser extent, portions of the southeastern United States.

#### OBJECTIVES/WHAT WE SEEK:

- **Strengthening the Environmental Community.** A strong, effective and sustainable nongovernmental organization (NGO) community dedicated to the long-term conservation of freshwater ecosystems.
- **Public Policies.** Well-designed and effectively implemented water-quality and water-quantity policies that advance the conservation of freshwater ecosystems.

### ■ INTERNATIONAL FINANCE FOR SUSTAINABILITY

**Goal:** To shape international investment to support sustainable development and reduce environmental degradation.

#### OBJECTIVES/WHAT WE SEEK:

- **Infrastructure and Energy for a Sustainable Future.** Infrastructure and energy investments that contribute to environmental sustainability and offer local economic opportunity.
- **Sustainable Regional Development and Integration.** Regional trade and investment strategies that contribute to local sustainable development, with an emphasis on Latin America.

### ■ SPECIAL INITIATIVES

**Goal:** To respond to unique opportunities to advance environmental protection in the United States and internationally.

#### OBJECTIVES/WHAT WE SEEK:

- **Growth Management and Urban Revitalization in Michigan.** In Michigan's urban areas and surrounding older communities, a built environment designed to promote environmental health, economic prosperity and social equity.
- **Special Opportunities.** Efforts that offer a one-time opportunity to contribute to the resolution of a significant domestic or global concern.

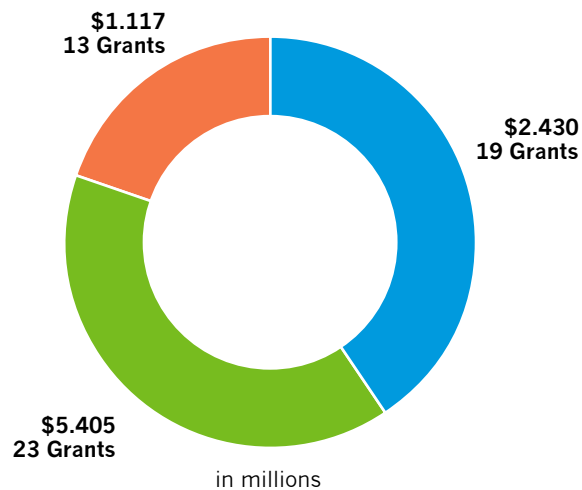




*The Great Lakes Coastal Marsh near Arcadia is one of only about 15 freshwater marshes that still exist along the western shoreline of Michigan's Lower Peninsula. Protecting freshwater ecosystems and other natural resources is key to nurturing a sustainable global community.*

## GRANT ACTIVITY:

\$8,951,954 / 55 GRANTS



### CONSERVATION OF FRESHWATER ECOSYSTEMS

Strengthening the Environmental Community	\$ 1.255	9
Public Policies	\$ 1.175	10

### INTERNATIONAL FINANCE FOR SUSTAINABILITY

Infrastructure and Energy for a Sustainable Future	\$ 3.835	17
Sustainable Regional Development and Integration	\$ 1.570	6

### SPECIAL INITIATIVES

Growth Management and Urban Revitalization in Michigan	\$ .440	5
Special Opportunities	\$ .677	8

<b>TOTALS</b>	<b>\$ 8.952</b>	<b>55</b>
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## CONSERVATION OF FRESHWATER ECOSYSTEMS

### Strengthening the Environmental Community

#### Citizens Campaign Fund for the Environment

*Farmingdale, NY*  
\$40,000 – 12 mos.  
General purposes

#### Environmental Defence

*Toronto, Ontario*  
\$150,000 – 24 mos.  
Great Lakes water program

#### Freshwater Future

*Petoskey, MI*  
\$455,000 – 24 mos.  
General purposes

#### Great Lakes and St. Lawrence Cities Initiative

*Chicago, IL*  
\$100,000 – 24 mos.  
General purposes

#### Heart of the Lakes Center for Land Conservation Policy

*Bay City, MI*  
\$140,000 – 24 mos.  
General purposes

#### Institute for Conservation Leadership

*Takoma Park, MD*  
\$120,000 – 12 mos.  
Freshwater leadership initiative

#### Michigan Environmental Council

*Lansing, MI*  
\$150,000 – 24 mos.  
Great Lakes program

#### University of Michigan

*Ann Arbor, MI*  
\$100,000 – 24 mos.  
Outreach to new freshwater  
constituencies project

**Subtotal:** \$1,255,000  
Strengthening the Environmental  
Community

### Public Policies

#### Alabama Rivers Alliance

*Birmingham, AL*  
\$100,000 – 24 mos.  
Alabama water-management  
project

#### American Rivers

*Washington, DC*  
\$150,000 – 24 mos.  
Promoting integrated water  
management in the Great Lakes

#### Coastal Conservation League

*Charleston, SC*  
\$50,000 – 36 mos.  
Protecting freshwater ecosystems

#### Ecojustice Canada

*Vancouver, British Columbia*  
\$150,000 – 24 mos.  
Great Lakes water-protection  
program

#### Great Lakes Environmental Law Center

*Detroit, MI*  
\$100,000 – 24 mos.  
Water quality project

#### Great Lakes Indian Fish and Wildlife Commission

*Odanah, WI*  
\$100,000 – 24 mos.  
Great Lakes sulfide ore-mining  
project

#### National Wildlife Federation

*Reston, VA*  
\$85,000 – 31 mos.  
Sustaining the Great Lakes  
project

#### Northeast-Midwest Institute

*Washington, DC*  
\$150,000 – 24 mos.  
Great Lakes Washington program

#### River Network

*Portland, OR*  
\$40,000 – 18 mos.  
Water quality project

#### Southern Environmental Law Center

*Charlottesville, VA*  
\$250,000 – 24 mos.  
Southern water-management  
project

**Subtotal:** \$1,175,000  
Public Policies

**Program Area Total:** \$2,430,000  
Conservation of Freshwater  
Ecosystems

## INTERNATIONAL FINANCE FOR SUSTAINABILITY

### Infrastructure and Energy for a Sustainable Future

#### ActionAid Brasil

*Rio de Janeiro, Brazil*  
\$200,000 – 24 mos.  
Monitoring BRICS development  
in Brazil

#### ActionAid USA

*Washington, DC*  
\$300,000 – 24 mos.  
BRICS action project

#### BankTrack

*Nijmegen, Netherlands*  
\$200,000 – 24 mos.  
General purposes

#### Both Ends Foundation

*Amsterdam, Netherlands*  
\$300,000 – 24 mos.  
Multilateral financial institutions  
and export credit agencies  
program

#### Center for International Environmental Law

*Washington, DC*  
\$200,000 – 24 mos.  
Ensuring development and  
climate finance support  
sustainable development

#### Environmental Law Alliance Worldwide

*Eugene, OR*  
\$280,000 – 24 mos.  
General purposes

#### Friends of the Earth

*Washington, DC*  
\$400,000 – 24 mos.  
Advancing and protecting  
sustainability standards in  
development finance

#### Institute for Policy Studies

*Washington, DC*  
\$305,000 – 24 mos.  
Global finance for climate  
sustainability

#### International Rivers

*Berkeley, CA*  
\$350,000 – 24 mos.  
General purposes

#### NGO Forum on ADB

*Quezon City, Philippines*  
\$100,000 – 24 mos.  
General purposes

#### Pacific Environment

*San Francisco, CA*  
\$200,000 – 24 mos.  
Responsible finance campaign

#### Sakhalin Environment Watch

*Yuzhno-Sakhalinsk, Russia*  
\$300,000 – 35 mos.  
Public monitoring of oil and gas  
projects on Sakhalin

#### Sierra Club Foundation

*San Francisco, CA*  
\$200,000 – 24 mos.  
International Financial Institution  
reform project

#### South Africa Development Fund

*Boston, MA*  
\$50,000 – 24 mos.  
BASIC South Initiative

#### Tides Canada Initiatives

*Vancouver, British Columbia*  
\$50,000 – 36 mos.  
Halifax Initiative

#### World Resources Institute

*Washington, DC*  
\$400,000 – 24 mos.  
International financial flows and  
the environment

**Subtotal:** \$3,835,000  
Infrastructure and Energy for  
a Sustainable Future

### Sustainable Regional Development and Integration

#### Center for Socio-Environmental Support

*Cunha, Brazil*  
\$500,000 – 24 mos.  
South America small grants  
program

#### Friends of the Earth – Brazilian Amazonia

*São Paulo, Brazil*  
\$300,000 – 24 mos.  
Improving sustainable  
performance of financial  
institutions in Brazil

#### iBase

*Rio de Janeiro, Brazil*  
\$180,000 – 18 mos.  
Monitoring Brazilian Development  
Bank investments in energy and  
infrastructure

#### INESC

*Brasília, Brazil*  
\$240,000 – 24 mos.  
Finance for sustainable  
development in South America

#### IPS-Inter Press Service

*Montevideo, Uruguay*  
\$200,000 – 24 mos.  
Growing role of Brazil in Latin  
America

#### Sobrevivencia

*Asunción, Paraguay*  
\$150,000 – 24 mos.  
Building capacity and alliances for  
international financial institutions  
monitoring

**Subtotal:** \$1,570,000  
Sustainable Regional Development  
and Integration

**Program Area Total:** \$5,405,000  
International Finance for  
Sustainability



## SPECIAL INITIATIVES

### Growth Management and Urban Revitalization in Michigan

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#### Ecology Center

*Ann Arbor, MI*

\$40,000 – 24 mos.

Model transit project

#### Michigan Association of Planning

*Ann Arbor, MI*

\$70,000 – 18 mos.

Integrating transportation, health and community placemaking

#### Michigan Environmental Council

*Lansing, MI*

\$100,000 – 24 mos.

Moving Michigan toward a world-class transportation system

#### Michigan Fitness Foundation

*Lansing, MI*

\$130,000 – 24 mos.

Enhancing transportation equity in Michigan

#### Michigan Land Use Institute

*Traverse City, MI*

\$100,000 – 24 mos.

Initiative to promote transportation choices in Grand Traverse region

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**Subtotal:** \$440,000

Growth Management and Urban Revitalization in Michigan

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### Special Opportunities

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#### Consultative Group on

#### Biological Diversity

*San Francisco, CA*

\$40,000 – 24 mos.

General purposes

#### Council of Great Lakes

#### Governors

*Chicago, IL*

\$50,000 – 12 mos.

Great Lakes summit

#### EcoAdapt

*Bainbridge Island, WA*

\$50,000 – 16 mos.

Climate adaptation survey

#### Foundation-Administered Project

\$71,954

International Finance for Sustainability convenings

#### Grand Valley State University

*Allendale, MI*

\$75,000 – 15 mos.

Growing Michigan's blue economy

#### Island Press

*Washington, DC*

\$50,000 – 12 mos.

Translating climate science for actionable solutions

#### Michigan United Conservation Clubs

*Lansing, MI*

\$140,000 – 12 mos.

Michigan state parks and outdoor recreation panel

#### Third World Network Berhad

*Penang, Malaysia*

\$200,000 – 24 mos.

Capacity building in south on climate change and sustainable development

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**Subtotal:** \$676,954

Special Opportunities

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**Program Area Total:** \$1,116,954

Special Initiatives

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**Program Total:** \$8,951,954

Environment

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## 2013 PROGRAM OVERVIEW: FLINT AREA

**Mission:** To foster a well-functioning, connected community that is capable of meeting the economic, social and racial challenges ahead.

### ■ ARTS, CULTURE AND EDUCATION

**Goal:** To support education, arts and cultural institutions as critical forces for positive change and key determinants of the community's quality of life and economic well-being.

#### OBJECTIVES/WHAT WE SEEK:

- **Arts and Culture.** Strong, sustainable and vibrant local cultural organizations that provide diverse arts and cultural opportunities to all residents of Genesee County.
- **Education.** A continuum of high-quality learning opportunities that meets the needs of Flint-area children, youth and adults from pre-kindergarten through college.

### ■ ECONOMIC REVITALIZATION

**Goal:** To support efforts that improve local governance, regional cooperation, community participation and the Flint area's economic vitality.

#### OBJECTIVES/WHAT WE SEEK:

- **Economic Development.** A vibrant and diverse regional economy.
- **Workforce Development.** Quality employment opportunities for Flint-area residents who face multiple barriers to good jobs in the regional labor market.

### ■ STRENGTHENING COMMUNITY

**Goal:** To support programs that provide opportunities for children and families, improve neighborhoods and the community, and sustain a vibrant nonprofit sector.

#### OBJECTIVES/WHAT WE SEEK:

- **Children and Families.** Healthy and productive lives for Genesee County children and families.
- **Housing and Neighborhoods.** Affordable housing and livable neighborhoods, with an emphasis on the city of Flint.
- **Philanthropy/Nonprofit Sector.** A strong, local nonprofit sector capable of meeting community needs.

### ■ SPECIAL INITIATIVES

**Goal:** To respond to critical opportunities and/or issues that have the potential to significantly improve the quality of life in the Flint area.

#### OBJECTIVE/WHAT WE SEEK:

- **Special Initiatives.** Flexibility to respond to critical needs, seize special opportunities, leverage other resources and incubate new program areas in the Flint community.

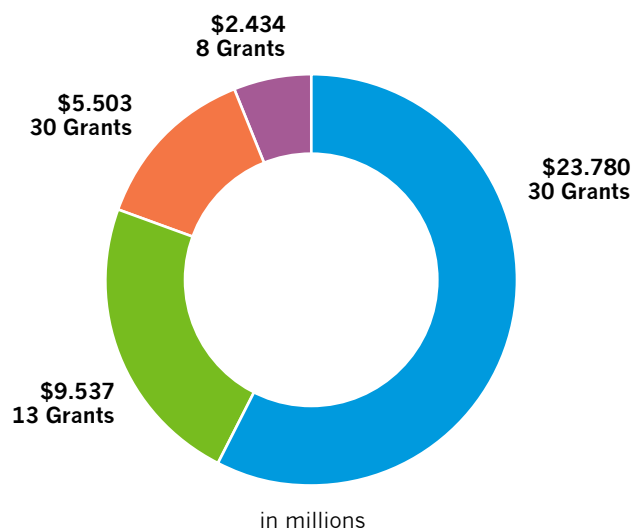


The Mott Foundation has funded a summer employment program for Flint-area young people since 1996. In 2013, more than 500 teens found jobs through the Summer Youth Initiative, operated by the Flint & Genesee Chamber of Commerce. The Chamber also offers TeenQuest, an afterschool job training program that serves more than 600 students annually.



PHOTO CREDIT: RICK SMITH

**GRANT ACTIVITY:**  
\$41,253,692 / 81 GRANTS



	GRANT DOLLARS (in millions)	NUMBER OF GRANTS
ARTS, CULTURE AND EDUCATION		
Education	\$ 18.892	14
Arts and Culture	\$ 4.888	16
ECONOMIC REVITALIZATION		
Economic Development	\$ 9.168	10
Workforce Development	\$ .369	3
STRENGTHENING COMMUNITY		
Children and Families	\$ 2.290	18
Housing and Neighborhoods	\$ 2.285	7
Philanthropy/Nonprofit Sector	\$ .928	5
SPECIAL INITIATIVES		
Special Initiatives	\$ 2.434	8
TOTALS	\$ 41.254	81



## ARTS, CULTURE AND EDUCATION

### Education

#### 114th Partnership Rockville, MD

\$30,000 – 6 mos.  
College and career pathway  
readiness: district audit for  
sequencing success

#### Children's Aid Society New York, NY

\$150,700 – 18 mos.  
Community schools technical  
assistance

#### Cranbrook Educational Community

Bloomfield Hills, MI  
\$100,000 – 12 mos.  
Flint Community Schools young  
scientists

#### Flint Community Schools Flint, MI

\$576,200 – 12 mos.  
Science, technology, engineering  
and math support  
\$70,000 – 3 mos.  
Summer Tot Lot program  
\$100,000 – 17 mos.  
Superintendent technical  
assistance

#### Foundation-Administered Project

\$362,500  
Technical assistance for Flint  
Community Schools

#### Genesee Area Focus Fund Flint, MI

\$3,100,000 – 12 mos.  
YouthQuest afterschool initiative  
–\$250,000  
Adjustment to previous grant

#### Genesee Intermediate School District

Flint, MI  
\$150,000 – 10 mos.  
Genesee Early College

#### HighScope Educational Research Foundation

Ypsilanti, MI  
\$240,000 – 18 mos.  
Early education curriculum and  
education

#### Kettering University

Flint, MI  
\$4,912,000 – 24 mos.  
Transformational initiatives

#### Michigan State University

East Lansing, MI  
\$9,000,000  
Flint public health and medical  
campus endowment

#### Mott Community College

Flint, MI  
\$149,953 – 12 mos.  
Smart Teachers as Role Models  
(STAR) Initiative

#### University of Michigan-Flint

Flint, MI  
\$200,000 – 24 mos.  
International student recruitment

**Subtotal:** \$18,891,353  
Education

### Arts and Culture

#### ArtServe Michigan

Wixom, MI  
\$25,000 – 12 mos.  
Michigan cultural data project

#### Back to the Bricks

Davison, MI  
\$15,000 – 10 mos.  
Back to the Bricks marketing

#### City of Flint

Flint, MI  
\$111,348 – 6 mos.  
Back to the Bricks policing and  
public safety

#### Community Foundation of Greater Flint

Flint, MI  
\$50,000 – 12 mos.  
S. Jean Simi Fund for the Arts

#### Flint Cultural Center Corporation

Flint, MI  
\$302,110 – 17 mos.  
Property acquisition  
\$1,500,000 – 12 mos.  
Operating support  
\$50,000 – 12 mos.  
Flint Community Schools  
programming

#### Flint Institute of Arts

Flint, MI  
\$1,500,000 – 12 mos.  
Operating support

#### Flint Institute of Music

Flint, MI  
\$25,280 – 14 mos.  
Enrique Diemecke 25th  
anniversary CD  
\$50,000 – 6 mos.  
Music in the Parks  
\$700,000 – 12 mos.  
Operating support  
\$50,000 – 6 mos.  
Tapology Tap Dance Festival for  
Youth

#### Foundation-Administered Project

\$7,000  
Cultural Center campus data  
collection and analysis  
\$45,683  
Festivals consultant

#### Greater Flint Arts Council

Flint, MI  
\$150,000 – 12 mos.  
General purposes  
\$120,000 – 12 mos.  
Parade of Festivals  
\$86,780 – 12 mos.  
Capital improvements

#### Sphinx Organization

Detroit, MI  
\$100,000 – 12 mos.  
Overture program and  
partnership with Flint Institute of  
Music

**Subtotal:** \$4,888,201  
Arts and Culture

**Program Area Total:** \$23,779,554  
Arts, Culture and Education

## ECONOMIC REVITALIZATION

### Economic Development

#### Brookings Institution

Washington, DC  
\$250,000 – 12 mos.  
Metropolitan policy program

#### Foundation for the Uptown Reinvestment Corporation

Flint, MI  
\$295,000 – 4 mos.  
Downtown property purchase  
\$113,000 – 12 mos.  
Downtown security  
\$7,700,000 – 25 mos.  
Flint health and wellness district  
\$48,500 – 12 mos.  
Operating support  
\$72,000 – 11 mos.  
Real estate development support  
services

#### Foundation-Administered Project

\$115,000  
Technical assistance for  
downtown Flint revitalization

#### Kettering University

Flint, MI  
\$270,000 – 12 mos.  
Property purchase

#### United Way of Genesee County

Flint, MI  
\$250,000 – 12 mos.  
Flint Area Reinvestment Office

#### University of Michigan-Flint

Flint, MI  
\$54,136 – 10 mos.  
Innovation incubator

**Subtotal:** \$9,167,636  
Economic Development

### Workforce Development

#### Greater Flint Health Coalition

Flint, MI  
\$175,000 – 12 mos.  
Flint health-care employment  
opportunities project

#### Mott Community College

Flint, MI  
\$44,468 – 7 mos.  
Teen CEO initiative

#### Specialized Employment Services Inc.

Flint, MI  
\$150,000 – 12 mos.  
Flint STRIVE replication program

**Subtotal:** \$369,468  
Workforce Development

**Program Area Total:** \$9,537,104  
Economic Revitalization

## STRENGTHENING COMMUNITY

### Children and Families

#### American Arab Heritage Council

Flint, MI  
\$45,000 – 12 mos.  
Immigration services

#### Boys & Girls Club of Greater Flint

Flint, MI  
\$160,000 – 12 mos.  
General purposes  
\$26,500 – 5 mos.  
Executive search

#### Carriage Town Ministries

Flint, MI  
\$65,000 – 12 mos.  
Increasing food distribution

#### Catholic Charities of Shiawassee and Genesee Counties

Flint, MI  
\$285,000 – 12 mos.  
North End Soup Kitchen,  
warming center and medical  
transportation



**Corporation for a Skilled Workforce***Ann Arbor, MI*

\$98,200 – 12 mos.

Summer Youth Initiative evaluation

**Crim Fitness Foundation***Flint, MI*

\$40,000 – 36 mos.

Repayable grant to promote health and fitness in elementary schools

**Food Bank of Eastern Michigan***Flint, MI*

\$100,000 – 12 mos.

Increasing food distribution and access

\$50,000 – 12 mos.

Flint diaper bank

**Genesee Area Focus Fund***Flint, MI*

\$825,000 – 12 mos.

Summer Youth Initiative

**Old Newsboys of Flint Inc.***Flint, MI*

\$50,000 – 12 mos.

Seasonal care assistance

**Priority Children***Flint, MI*

\$30,000 – 9 mos.

Summer Youth Expo

**Resource Genesee***Flint, MI*

\$60,000 – 12 mos.

One Stop Housing Resource Center

**Salvation Army of Genesee County***Flint, MI*

\$100,000 – 12 mos.

Rent and utility assistance program

**Shelter of Flint Inc.***Flint, MI*

\$170,000 – 12 mos.

General purposes

**Specialized Employment Services Inc.***Flint, MI*

\$85,000 – 12 mos.

Flint STRIVE Academy youth empowerment program

**YWCA of Greater Flint***Flint, MI*

\$100,000 – 12 mos.

General purposes

**Subtotal:** \$2,289,700

Children and Families

**Housing and Neighborhoods****Center for Community Progress***Flint, MI*

\$1,180,000 – 12 mos.

General purposes

**City of Flint***Flint, MI*

\$265,673 – 12 mos.

Master plan for a sustainable Flint

**Court Street Village Non-Profit Housing Corporation***Flint, MI*

\$40,000 – 12 mos.

General purposes

**Genesee County Land Bank Authority***Flint, MI*

\$300,000 – 12 mos.

Neighborhood and community planning

\$65,000 – 24 mos.

Property management software for land banks

**Local Initiatives Support Corporation***New York, NY*

\$300,000 – 36 mos.

Flint and Genesee County community development project

**Metro Community Development***Flint, MI*

\$135,000 – 12 mos.

General purposes

**Subtotal:** \$2,285,673

Housing and Neighborhoods

**Philanthropy/Nonprofit Sector****Community Foundation of Greater Flint***Flint, MI*

\$164,000 – 14 mos.

Flint National Service Accelerator Fund

**Crim Fitness Foundation***Flint, MI*

\$135,000 – 12 mos.

Capacity building

**Foundation-Administered Project**

–\$8,039

Adjustment to previous grant

**United Way of Genesee County***Flint, MI*

\$250,000 – 12 mos.

General purposes

\$150,000 – 18 mos.

Capacity building

\$237,000 – 12 mos.

Building Excellence, Sustainability and Trust nonprofit capacity building

**Subtotal:** \$927,961

Philanthropy/Nonprofit Sector

**Program Area Total:** \$5,503,334

Strengthening Community

**SPECIAL INITIATIVES****Special Initiatives****City of Flint***Flint, MI*

\$235,700 – 24 mos.

Flint 21st Century Community Policing

**Flint Area Congregations Together***Flint, MI*

\$110,000 – 12 mos.

General purposes

**Flint Downtown Development Authority***Flint, MI*

\$10,000 – 19 mos.

Downtown festivals

**Flint Jewish Federation***Flint, MI*

\$18,000 – 36 mos.

General purposes

**Genesee County Parks & Recreation Commission***Flint, MI*

\$1,800,000 – 12 mos.

General purposes

\$155,000 – 9 mos.

Financial and program planning research project

**Michigan State University***East Lansing, MI*

\$100,000 – 14 mos.

Flint 21st Century Community Policing technical assistance

**Mount Hermon Missionary Baptist Church***Flint, MI*

\$5,000 – 24 mos.

African-American history calendar

**Subtotal:** \$2,433,700

Special Initiatives

**Program Area Total:** \$2,433,700

Special Initiatives

**Program Total:** \$41,253,692

Flint Area



# 2013 PROGRAM OVERVIEW: PATHWAYS <sup>OUT OF</sup> POVERTY

**Mission:** To identify, test and help sustain pathways out of poverty for low-income people and communities.

## ■ IMPROVING COMMUNITY EDUCATION

**Goal:** To ensure that community education serves as a pathway out of poverty for children in low-income communities.

### OBJECTIVES/WHAT WE SEEK:

- **Educational Opportunities for Vulnerable Youth.** Policies and practices that ensure that vulnerable youth are prepared for college and careers.
- **Learning Beyond the Classroom.** High-quality learning beyond the classroom initiatives that increase student success by providing students with multiple ways of learning, anchored to high standards and aligned with educational resources throughout a community.

## ■ EXPANDING ECONOMIC OPPORTUNITY

**Goal:** To expand opportunity for those in, or at risk of, persistent poverty by promoting policies and programs that increase income and assets, help people connect to the labor market and enable them to advance into better-quality, higher-paying jobs.

### OBJECTIVES/WHAT WE SEEK:

- **Income Security.** A social safety net that augments families' efforts to escape poverty.
- **Reducing Barriers to Employment.** Innovative strategies that enable low-skill, low-income job seekers to enter the labor market.
- **Retention and Wage Progression.** Workforce development policies and practices that help low-income workers stay in the labor market and increase their earnings over time.

## ■ BUILDING ORGANIZED COMMUNITIES

**Goal:** To enhance the power and effectiveness of the community-organizing field in order to strengthen and sustain the involvement of low-income communities in shaping their futures.

### OBJECTIVE/WHAT WE SEEK:

- **Building Community Organizing Infrastructure.** Strong and effective community-organizing networks at the national, regional and state levels that foster community engagement and positive change in poor communities.

## ■ SPECIAL INITIATIVES

**Goal:** To sustain promising practices and promote innovative and multidisciplinary approaches to reduce persistent poverty.

### OBJECTIVES/WHAT WE SEEK:

- **Transitions.** Policies and practices that strengthen microenterprise in the United States in order to maximize its potential as a means for low-income entrepreneurs to escape from poverty.
- **Exploratory and Special Projects.** Flexibility to identify critical issues, seize special opportunities, research issues to determine future program directions and promote cross-cutting projects.

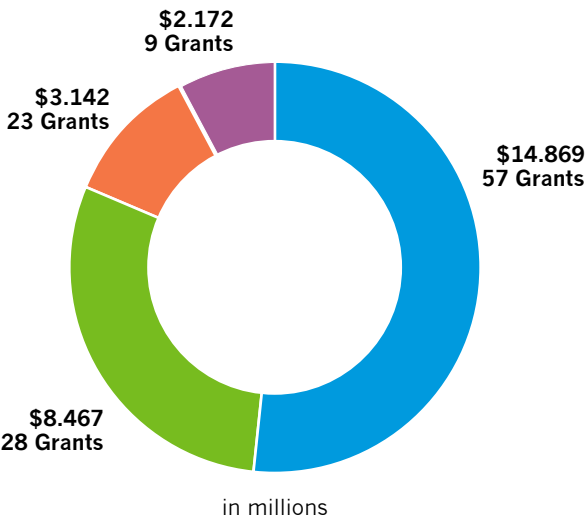




PHOTO CREDIT: RICK SMITH

Mott's long-term commitment to afterschool programming is anchored in the belief that providing all children, particularly those in underserved communities, with access to high-quality programs can close gaps in academic achievement and create important pathways to opportunity.

# GRANT ACTIVITY: \$28,649,634 / 117 GRANTS



	GRANT DOLLARS (in millions)	NUMBER OF GRANTS
IMPROVING COMMUNITY EDUCATION		
Educational Opportunities for Vulnerable Youth	\$ 4.635	16
Learning Beyond the Classroom	\$ 10.234	41
EXPANDING ECONOMIC OPPORTUNITY		
Income Security	\$ 2.602	8
Reducing Barriers to Employment	\$ .576	4
Retention and Wage Progression	\$ 5.289	16
BUILDING ORGANIZED COMMUNITIES		
Building Community Organizing Infrastructure	\$ 3.142	23
SPECIAL INITIATIVES		
Transitions	\$ .520	4
Exploratory and Special Projects	\$ 1.652	5
TOTALS	\$ 28.650	117



## IMPROVING COMMUNITY EDUCATION

### Educational Opportunities for Vulnerable Youth

#### American Institutes for Research

*Washington, DC*  
\$126,485 – 12 mos.  
Powerful pathways: how high school cultures promote college and career awareness, readiness and success

#### American Youth Policy Forum

*Washington, DC*  
\$150,000 – 24 mos.  
Connecting and collaborating with key stakeholders to build pathways to education and the workforce for disconnected youth

#### Boston Private Industry Council

*Boston, MA*  
\$250,000 – 24 mos.  
Boston Youth Transitions Task Force: supporting city partnerships to address dropout crisis

#### Career Alliance Inc.

*Flint, MI*  
\$30,000 – 12 mos.  
Jobs for America's graduates

#### Community Foundation for the National Capital Region

*Washington, DC*  
\$40,000 – 12 mos.  
Youth Transition Funders Group

#### Editorial Projects in Education

*Bethesda, MD*  
\$100,000 – 12 mos.  
Diplomas Count: The Graduation Project

#### Mott Community College

*Flint, MI*  
\$49,050 – 12 mos.  
Increasing literacy levels for at-risk youth in college-connected programs

#### National League of Cities Institute

*Washington, DC*  
\$250,000 – 12 mos.  
Municipal leadership for disconnected youth

#### National Youth Employment Coalition

*Washington, DC*  
\$225,000 – 24 mos.  
Building capacity and informing policy to better serve disconnected youth

#### Philadelphia Youth Network

*Philadelphia, PA*  
\$248,000 – 24 mos.  
Philadelphia youth transitions collaborative: supporting city partnerships to address dropout crisis

#### Resource Genesee

*Flint, MI*  
\$95,000 – 12 mos.  
Genesee County Out-of-School Youth Initiative

#### School & Main Institute

*Boston, MA*  
\$268,000 – 12 mos.  
Schools for the Future: developing new high school pathways and innovations for at-risk and struggling students

#### University of Michigan-Flint

*Flint, MI*  
\$415,700 – 12 mos.  
Precollege summer residential and academic year bridge program

#### Youth Connection Charter School

*Chicago, IL*  
\$150,000 – 12 mos.  
Career pathways program

#### YouthBuild USA

*Somerville, MA*  
\$237,500 – 12 mos.  
Developing sector strategies to position low-income youth for careers in high-demand sectors  
\$2,000,000 – 24 mos.  
Capacity building and program support

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**Subtotal:** \$4,634,735  
Educational Opportunities for Vulnerable Youth

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### Learning Beyond the Classroom

#### Afterschool Alliance

*Washington, DC*  
\$2,300,000 – 12 mos.  
General purposes  
\$125,000 – 14 mos.  
VISTA project

#### After-School All-Stars

*Los Angeles, CA*  
\$250,000 – 24 mos.  
Middle school initiative

#### After-School Corporation

*New York, NY*  
\$250,000 – 18 mos.  
Expanded learning and afterschool initiative

#### Alaska Children's Trust

*Anchorage, AK*  
\$225,000 – 36 mos.  
Alaska statewide afterschool network

#### Alliance for Excellent Education

*Washington, DC*  
\$100,000 – 12 mos.  
Digital learning in afterschool

#### American Institutes for Research

*Washington, DC*  
\$300,000 – 24 mos.  
Exploring statewide data systems for 21st century community learning centers

#### American Youth Policy Forum

*Washington, DC*  
\$100,000 – 24 mos.  
Integrating afterschool and school-community partnerships

#### Baltimore's Safe & Sound Campaign

*Baltimore, MD*  
\$225,000 – 36 mos.  
Maryland statewide afterschool network

#### Central Susquehanna Intermediate Unit

*Milton, PA*  
\$225,000 – 36 mos.  
Pennsylvania statewide afterschool network

#### Civic Canopy

*Denver, CO*  
\$15,000 – 12 mos.  
Colorado statewide afterschool partnership

#### Collaborative Communications Group

*Washington, DC*  
\$1,546,000 – 24 mos.  
Supporting national network of statewide afterschool networks

\$250,000 – 12 mos.

Afterschool communications project

#### Education's Next Horizon

*Baton Rouge, LA*  
\$225,000 – 36 mos.  
Louisiana statewide afterschool network

#### Foundation-Administered Project

\$83,714  
Afterschool technical assistance collaborative and statewide afterschool networks

\$104,418

Learning beyond the classroom technical assistance

#### FowlerHoffman

*Richmond, CA*  
\$200,000 – 12 mos.  
Policy and messaging strategies for afterschool networks

#### Furman University

*Greenville, SC*  
\$245,000 – 24 mos.  
Establishment of education policy institute

#### Greater Gallatin United Way

*Bozeman, MT*  
\$15,000 – 12 mos.  
Montana statewide afterschool partnership

#### Harvard University

*Cambridge, MA*  
\$350,000 – 24 mos.  
Supporting expanded learning and afterschool research

#### Indiana Association of United Ways

*Indianapolis, IN*  
\$225,000 – 36 mos.  
Indiana statewide afterschool network

#### Kaho'omiki

*Honolulu, HI*  
\$15,000 – 12 mos.  
Hawaii statewide afterschool partnership

#### LA's BEST

*Los Angeles, CA*  
\$125,000 – 24 mos.  
General purposes

#### McLean Hospital

*Belmont, MA*  
\$500,000 – 12 mos.  
Increasing science, technology, engineering and math in afterschool

#### Michigan Association of United Ways

*Lansing, MI*  
\$225,000 – 36 mos.  
Michigan statewide afterschool network

#### Minnesota Department of Education

*Roseville, MN*  
\$225,000 – 36 mos.  
Minnesota statewide afterschool network

#### Mozilla Foundation

*Mountain View, CA*  
\$100,000 – 12 mos.  
Digital badges initiative

#### Nebraska Children and Families Foundation

*Lincoln, NE*  
\$225,000 – 36 mos.  
Nebraska statewide afterschool network



**New Jersey School-Age Care Coalition**  
*Westfield, NJ*  
 \$225,000 – 36 mos.  
 New Jersey statewide afterschool network

**New Mexico Public Education Department**  
*Santa Fe, NM*  
 \$225,000 – 36 mos.  
 New Mexico statewide afterschool network

**Ohio Valley Educational Cooperative**  
*Shelbyville, KY*  
 \$225,000 – 36 mos.  
 Kentucky statewide afterschool network

**Pacific Science Center**  
*Seattle, WA*  
 \$50,000 – 12 mos.  
 Science, technology, engineering and math fellowship

**Partnership for Children and Youth**  
*Oakland, CA*  
 \$30,000 – 12 mos.  
 Learning in afterschool and summer project

**School's Out Washington**  
*Seattle, WA*  
 \$150,000 – 24 mos.  
 Washington statewide afterschool network

**United Way of Greater Atlanta**  
*Atlanta, GA*  
 \$225,000 – 36 mos.  
 Georgia statewide afterschool network

**United Ways of Tennessee**  
*Franklin, TN*  
 \$15,000 – 12 mos.  
 Tennessee statewide afterschool partnership

**University of Idaho Foundation**  
*Boise, ID*  
 \$15,000 – 12 mos.  
 Idaho statewide afterschool partnership

**Virginia Child Care Resource and Referral Network**  
*Richmond, VA*  
 \$225,000 – 36 mos.  
 Virginia statewide afterschool network

**Wyoming Community Foundation**  
*Laramie, WY*  
 \$225,000 – 36 mos.  
 Wyoming statewide afterschool network

**YWCA of Seattle-King County-Snohomish County**  
 –\$150,000  
 Adjustment to previous grant

**Subtotal:** \$10,234,132  
 Learning Beyond the Classroom

**Program Area Total:** \$14,868,867  
 Improving Community Education

## EXPANDING ECONOMIC OPPORTUNITY

### Income Security

**Brookings Institution**  
*Washington, DC*  
 \$200,000 – 24 mos.  
 Budgeting for national priorities

**Center on Budget and Policy Priorities**  
*Washington, DC*  
 \$950,000 – 36 mos.  
 State fiscal and low-income initiatives project

**Corporation for Enterprise Development**  
*Washington, DC*  
 \$200,000 – 24 mos.  
 Federal and state asset policy project

**Foundation-Administered Project**  
 \$59,064  
 Fiscal opportunity project  
 –\$20,000  
 Adjustment to previous grant

**Michigan Unemployment Insurance Project**  
*Ann Arbor, MI*  
 \$150,000 – 24 mos.  
 General purposes

**New America Foundation**  
*Washington, DC*  
 \$400,000 – 24 mos.  
 Asset building program

**Philanthropy New York**  
*New York, NY*  
 \$100,000 – 24 mos.  
 Asset Funders Network

**Urban Institute**  
*Washington, DC*  
 \$100,000 – 24 mos.  
 Joint Tax Policy Center

**Washington University**  
*St. Louis, MO*  
 \$463,016 – 24 mos.  
 Asset- and capacity-building meetings

**Subtotal:** \$2,602,080  
 Income Security

### Reducing Barriers to Employment

**Goodwill Industries of Mid-Michigan Inc.**  
*Flint, MI*  
 \$136,000 – 12 mos.  
 Mid-Michigan good temp alternative staffing organization

**Heartland Alliance for Human Needs & Human Rights**  
*Chicago, IL*  
 \$90,000 – 12 mos.  
 National Transitional Jobs Network

**ICA Group**  
*Brookline, MA*  
 \$200,000 – 12 mos.  
 Alternative Staffing Alliance

**US Ignite**  
*Washington, DC*  
 \$150,000 – 12 mos.  
 Flint US Ignite expansion

**Subtotal:** \$576,000  
 Reducing Barriers to Employment

### Retention and Wage Progression

**Aspen Institute**  
*Washington, DC*  
 \$375,000 – 12 mos.  
 Sector Skills Academy  
 \$125,000 – 12 mos.  
 Low-wage work: what can we do to improve job quality

**Career Alliance Inc.**  
*Flint, MI*  
 \$200,000 – 27 mos.  
 Flint/Genesee Earn & Learn Initiative

\$500,000 – 21 mos.  
 Flint/Genesee Earn & Learn Initiative – re-granting partnership with Open Society Foundations

**Corporation for a Skilled Workforce**  
*Ann Arbor, MI*  
 \$250,000 – 12 mos.  
 Building capacity of Michigan's workforce system

**County of Saginaw**  
*Saginaw, MI*  
 \$300,000 – 20 mos.  
 Saginaw Earn & Learn Initiative – re-granting partnership with Open Society Foundations

**Economic Mobility Corporation**  
*New York, NY*  
 \$50,000 – 12 mos.  
 General purposes

**Focus: HOPE**  
*Detroit, MI*  
 \$750,000 – 12 mos.  
 General purposes

**Insight Center for Community Economic Development**  
*Oakland, CA*  
 \$400,000 – 24 mos.  
 National Network of Sector Partners  
 \$200,000 – 12 mos.  
 Planning southern sector initiative

**Interfaith Education Fund**  
*Austin, TX*  
 \$225,000 – 12 mos.  
 Replicate sectoral initiatives

**National Skills Coalition**  
*Washington, DC*  
 \$400,000 – 22 mos.  
 General purposes

**PHI**  
*Bronx, NY*  
 \$300,000 – 12 mos.  
 General purposes  
 \$200,000 – 12 mos.  
 PHI – Michigan

**Prima Civitas Foundation**  
*East Lansing, MI*  
 \$113,552 – 12 mos.  
 Moving Ideas to Market Initiative

**Southwest Housing Solutions**  
*Detroit, MI*  
 \$900,000 – 21 mos.  
 Detroit/Wayne Earn & Learn Initiative – re-granting partnership with Open Society Foundations

**Subtotal:** \$5,288,552  
 Retention and Wage Progression

**Program Area Total:** \$8,466,632  
 Expanding Economic Opportunity

## BUILDING ORGANIZED COMMUNITIES

### Building Community Organizing Infrastructure

**Alliance for a Just Society**  
*Seattle, WA*  
 \$80,000 – 12 mos.  
 General purposes

**Alliance for Justice**  
*Washington, DC*  
 \$10,000 – 21 mos.  
 Resources for evaluating community organizing



**Bend the Arc: A Jewish Partnership for Justice**  
*New York, NY*  
\$50,000 – 12 mos.  
Organizing apprenticeship program

**Center for Community Change**  
*Washington, DC*  
\$300,000 – 12 mos.  
General purposes  
\$250,000 – 12 mos.  
Intermediary support for organizing communities  
\$58,000 – 20 mos.  
Documentation of IAF community organizing in Wisconsin

**Community Catalyst**  
*Boston, MA*  
\$50,000 – 12 mos.  
Community learning partnership

**Community Training and Assistance Center**  
*Boston, MA*  
\$250,000 – 12 mos.  
Intermediary support for organizing communities

**Direct Action and Research Training Center**  
*Miami, FL*  
\$130,000 – 24 mos.  
DART Organizers Institute

**Faith Action for Community Equity**  
*Honolulu, HI*  
\$65,000 – 12 mos.  
General purposes

**Foundation-Administered Project**  
\$47,943  
Intermediary support for organizing communities annual meeting

**Gamaliel Foundation**  
*Chicago, IL*  
\$200,000 – 12 mos.  
General purposes

**Harriet Tubman Center**  
*Detroit, MI*  
\$100,000 – 15 mos.  
Michigan organizing collaborative

**Interfaith Education Fund**  
*Austin, TX*  
\$96,000 – 24 mos.  
General purposes

**Isaiah Institute**  
*New Orleans, LA*  
\$30,000 – 24 mos.  
General purposes

**National Council of La Raza**  
*Washington, DC*  
\$250,000 – 12 mos.  
Intermediary support for organizing communities

**National Employment Law Project**  
*New York, NY*  
\$45,000 – 12 mos.  
Research and technical assistance to community organizing groups

**National People's Action**  
*Chicago, IL*  
\$250,000 – 12 mos.  
Intermediary support for organizing communities

**PICO United Florida**  
*Orlando, FL*  
\$140,000 – 24 mos.  
General purposes

**Southern California Education Fund**  
*Los Angeles, CA*  
\$200,000 – 12 mos.  
General purposes

**Southern Echo Inc.**  
*Jackson, MS*  
\$250,000 – 12 mos.  
Intermediary support for organizing communities

**Virginia Organizing Inc.**  
*Charlottesville, VA*  
\$10,000 – 24 mos.  
General purposes

**Washington Interfaith Network**  
*Washington, DC*  
\$180,000 – 12 mos.  
General purposes

**Western Organization of Resource Councils Education Project**  
*Billings, MT*  
\$100,000 – 12 mos.  
Leadership and capacity building project

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**Subtotal:** \$3,141,943  
Building Community  
Organizing Infrastructure

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**Program Area Total:** \$3,141,943  
Building Organized Communities

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## SPECIAL INITIATIVES

### Transitions

**Aspen Institute**  
*Washington, DC*  
\$100,000 – 9 mos.  
MicroTest  
\$100,000 – 8 mos.  
Demonstrating scale in domestic microenterprise

**Association for Enterprise Opportunity**  
*Washington, DC*  
\$225,000 – 12 mos.  
General purposes

**Center for Rural Affairs**  
*Lyons, NE*  
\$95,000 – 12 mos.  
Rural microenterprise development

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**Subtotal:** \$520,000  
Transitions

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## Exploratory and Special Projects

**Community Foundation for Southeast Michigan**  
*Detroit, MI*  
\$400,000 – 126 mos.  
New Economy Initiative for southeast Michigan

**Harlem Children's Zone**  
*New York, NY*  
\$200,000 – 12 mos.  
General purposes

**Michigan State University**  
*East Lansing, MI*  
\$102,192 – 13 mos.  
Fiscal solvency and service effectiveness project

**Prima Civitas Foundation**  
*East Lansing, MI*  
\$850,000 – 12 mos.  
General purposes

**Sagawa/Jospin LLC**  
*Chevy Chase, MD*  
\$100,000 – 8 mos.  
Service as a strategy

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**Subtotal:** \$1,652,192  
Exploratory and Special Projects

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**Program Area Total:** \$2,172,192  
Special Initiatives

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**Program Total:** \$28,649,634  
Pathways Out of Poverty

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# EXPLORATORY AND SPECIAL PROJECTS

**Mission:** To support unusual or unique opportunities addressing significant national and international problems. (Proposals are by invitation only; unsolicited proposals are discouraged.)

## EXPLORATORY AND SPECIAL PROJECTS

### Historically and Predominantly Black Colleges and Universities

**Phelps Stokes Fund**  
–\$50,000  
Adjustment to previous grant  
**Subtotal:** –\$50,000  
Historically and Predominantly Black Colleges and Universities

### Special Projects

**Center for Michigan**  
*Ann Arbor, MI*  
\$50,000 – 12 mos.  
General purposes

**Council for Advancement of Adult Literacy**  
*New York, NY*  
\$35,000 – 9 mos.  
Return on investment roundtable

**Council of Michigan Foundations**  
*Grand Haven, MI*  
\$80,000 – 12 mos.  
Office of Urban and Metropolitan Initiatives

**Institute for Global Ethics**  
*Rockport, ME*  
\$200,000 – 19 mos.  
Transition support

**Southern Center for International Studies**  
–\$100,000  
Adjustment to previous grant

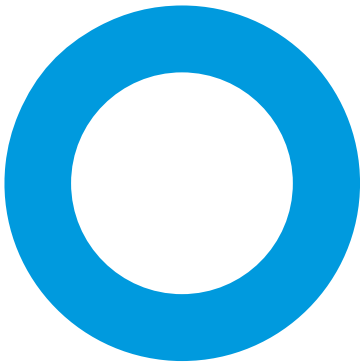
**Vital Voices Global Partnership**  
*Washington, DC*  
\$50,000 – 9 mos.  
Global leadership awards

**William J. Clinton Foundation**  
*New York, NY*  
\$20,000 – 12 mos.  
Clinton Global Initiative

**Subtotal:** \$335,000  
Special Projects

**Program Total:** \$285,000  
Exploratory and Special Projects

**GRANT ACTIVITY:**  
\$285,000 / 6 GRANTS



# EMPLOYEE AND TRUSTEE GRANTS

In addition to its regular grantmaking, the Foundation also encourages charitable giving by its Trustees and staff. The Foundation’s match to these contributions is included as part of its total grant budget.

## EMPLOYEE/TRUSTEE MATCHING AND TRUSTEE-INITIATED

### Employee/Trustee Matching Grants

**Program Area Total** \$1,306,674  
Employee/Trustee Matching

### Trustee-Initiated Grants

**Program Area Total:** \$840,000  
Trustee-Initiated

**Program Total:** \$2,146,674  
Employee/Trustee Matching and Trustee-Initiated

**TOTAL:** \$101,004,553  
All Grants









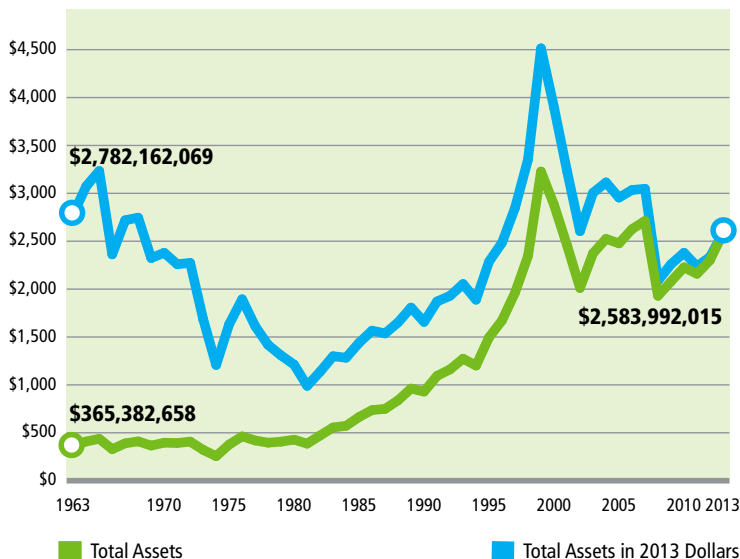
**FINANCE**



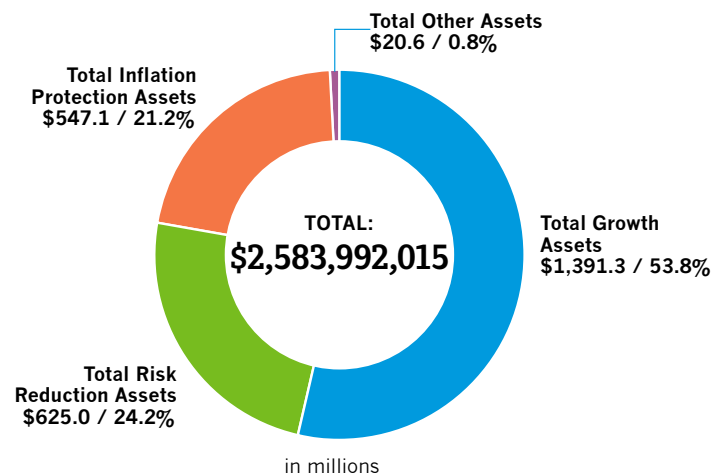
# PROFILE: 2013 ASSETS

In 2013, the Charles Stewart Mott Foundation ended the year with nearly \$2.6 billion in assets, an increase over the \$2.3 billion in assets at the close of 2012.

**Total Assets at Market Value & 2013 Dollars** (in millions)



**Asset Allocation 12.31.13**



**2004–2013 Selected Financial Information** (in millions)

	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Total Assets – Fair Value	\$2,524.7	\$2,477.3	\$2,626.1	\$2,711.5	\$1,929.9	\$2,079.9	\$2,227.4	\$2,159.9	\$2,301.1	\$2,584.0
Total Assets – 2013 Dollars	3,091.9	2,933.6	3,032.8	3,008.6	2,139.4	2,244.6	2,368.3	2,230.5	2,329.6	2,584.0
12-Month Rolling Average Assets	2,361.9	2,407.0	2,507.0	2,707.4	2,380.2	1,916.0	2,063.4	2,227.7	2,246.8	2,393.3
Total Investment Income (Loss)	287.8	84.4	290.5	245.0	(684.6)	289.3	275.5	62.8	252.7	401.4
Total Investment Income (Loss) 2013 Dollars	352.5	99.9	335.5	271.9	(758.9)	312.2	292.9	64.8	255.8	401.4
Total Grants Awarded	98.7	123.2	107.3	108.7	110.4	109.3	92.9	89.3	91.0	101.0
Total Expenditures*	136.3	132.1	142.7	158.2	100.6	134.2	127.9	130.0	110.9	137.1

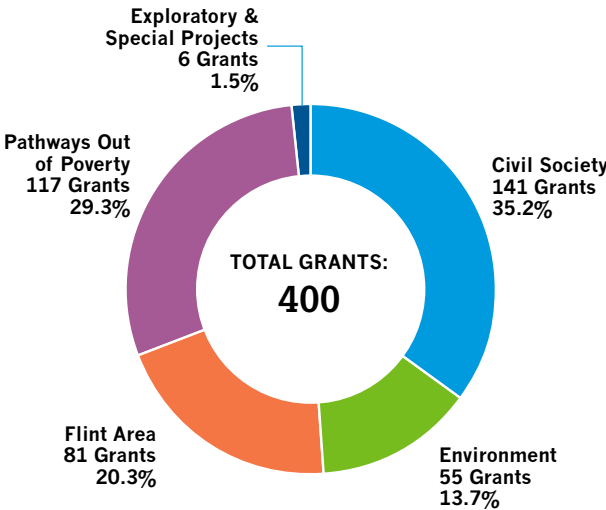
**NOTE:** Private foundations are required to make qualifying distributions (grant payments and reasonable administrative expenses) equal to roughly 5 percent of their average assets each year. The basis of the 5 percent calculation is a rolling, or 12-month, average of the foundation's investment assets.

\*Total expenditures include grant payments, foundation-administered projects, administrative expenses, excise tax and investment expenses.

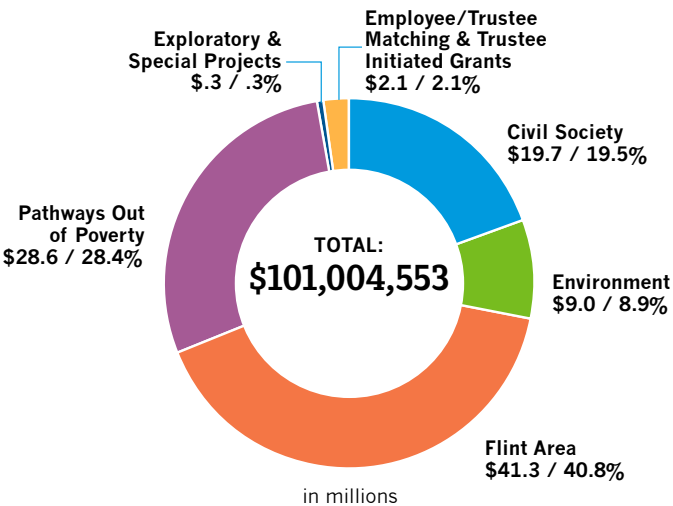


# PROFILE: 2013 GRANTMAKING

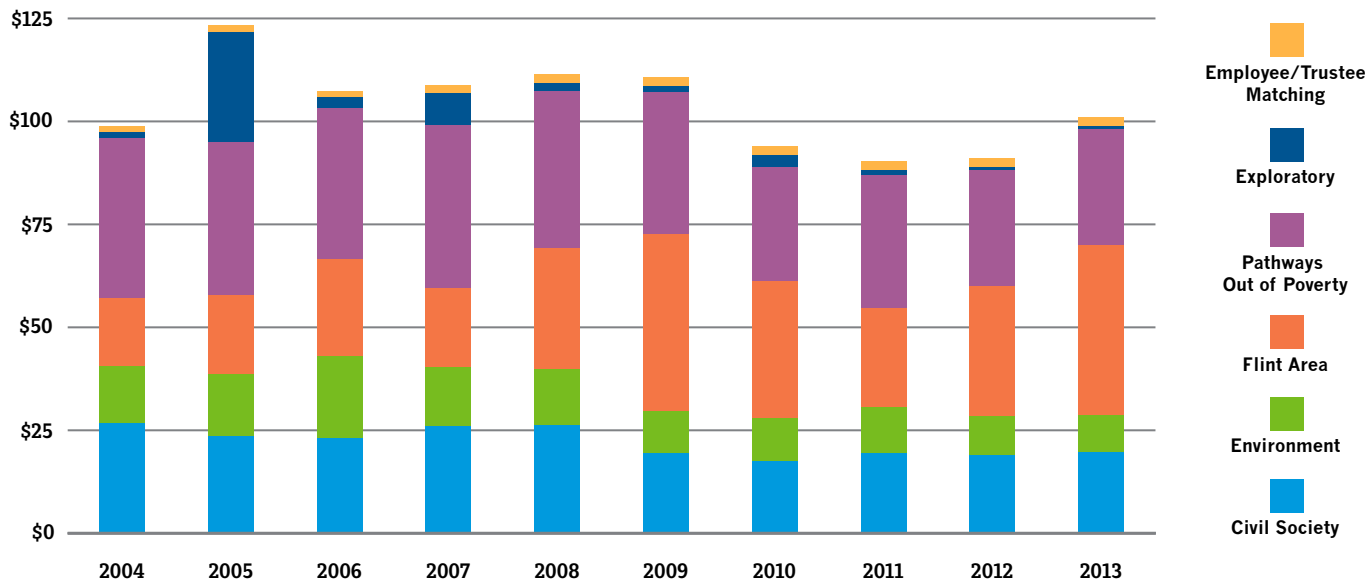
## Grantmaking Activities 2013



Does not include Employee/Trustee Matching & Trustee-Initiated Grants



## 2004–2013 Grants Awarded by Program (in millions)





## REPORT OF INDEPENDENT CERTIFIED PUBLIC ACCOUNTANTS



Grant Thornton

### BOARD OF TRUSTEES

Charles Stewart Mott Foundation

We have audited the accompanying financial statements of Charles Stewart Mott Foundation (the "Foundation"), which comprise the statements of financial position as of December 31, 2013 and 2012, and the related statements of activities and cash flows for the years then ended and the related notes to the financial statements.

#### **Management's responsibility for the financial statements**

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

#### **Auditor's responsibility**

Our responsibility is to express an opinion on these financial statements based on our audits. We conducted our audits in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the Foundation's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the Foundation's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

#### **Opinion**

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of Charles Stewart Mott Foundation as of December 31, 2013 and 2012, and the results of its activities and its cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

*Grant Thornton LLP*

Southfield, Michigan

July 1, 2014



# STATEMENTS OF FINANCIAL POSITION

Years Ended December 31,

	2013	2012
<b>Assets</b>		
Investments, at fair value:		
Cash equivalents	\$ 30,677,696	\$ 58,160,123
Public equities	575,097,218	481,980,259
Fixed income securities	127,751,664	181,733,284
Alternatives – limited partnerships	1,320,751,924	1,092,985,976
Alternatives – nonpartnerships	502,429,137	468,890,658
Investment trades receivable	<u>6,711,870</u>	<u>6,028,853</u>
	2,563,419,509	2,289,779,153
 Cash	 4,261,023	 4,061,550
Accrued interest and dividends	679,938	1,697,831
Land, building and improvements, net	3,520,727	3,591,587
Other assets	<u>12,110,818</u>	<u>2,010,453</u>
<b>Total Assets</b>	<b><u>\$ 2,583,992,015</u></b>	<b><u>\$ 2,301,140,574</u></b>
<b>Liabilities and Unrestricted Net Assets</b>		
Investment trades payable	\$ 4,781,154	\$ 109,151
Grants payable	9,262,720	21,257,356
Accounts payable and other liabilities	25,068,488	27,918,758
Deferred excise tax	<u>12,095,283</u>	<u>6,942,779</u>
<b>Total Liabilities</b>	51,207,645	56,228,044
<b>Unrestricted Net Assets</b>	<u>2,532,784,370</u>	<u>2,244,912,530</u>
<b>Total Liabilities and Unrestricted Net Assets</b>	<b><u>\$ 2,583,992,015</u></b>	<b><u>\$ 2,301,140,574</u></b>

The accompanying notes are an integral part of the financial statements.



## STATEMENTS OF ACTIVITIES

Years Ended December 31,

	2013	2012
<b>Income:</b>		
Dividends and interest	\$ 21,571,349	\$ 24,941,430
Limited partnership income (loss)	67,279,527	53,794,462
Net realized gain (loss) on investments	62,130,811	26,768,462
Net unrealized gain (loss) on investments	250,187,887	148,121,029
Other income (expense)	1,247,501	(926,163)
	<u>402,417,075</u>	<u>252,699,220</u>
<b>Investment expenses:</b>		
Direct investment expenses	5,462,522	5,580,611
Provision for excise tax:		
Current	1,502,682	2,039,409
Deferred expense (income)	5,152,504	2,804,788
	<u>12,117,708</u>	<u>10,424,808</u>
<b>Net investment income</b>	390,299,367	242,274,412
<b>Grants and operating expenses:</b>		
Grants, net of refunds	97,671,821	86,951,982
Foundation-administered projects	1,548,680	1,274,574
Administration expenses	15,650,534	15,674,217
	<u>114,871,035</u>	<u>103,900,773</u>
<b>Net operating income (loss)</b>	275,428,332	138,373,639
<b>Other changes in unrestricted net assets:</b>		
Pension-related changes other than net periodic pension cost	10,267,610	(1,035,288)
Postretirement health care-related changes other than net periodic benefit cost	2,175,898	(1,693,670)
Change in unrestricted net assets	<u>287,871,840</u>	<u>135,644,681</u>
<b>Unrestricted net assets:</b>		
Beginning of year	2,244,912,530	2,109,267,849
End of year	<u>\$ 2,532,784,370</u>	<u>\$ 2,244,912,530</u>

The accompanying notes are an integral part of the financial statements.



## STATEMENTS OF CASH FLOWS

	Years Ended December 31,	
	2013	2012
<b>Cash flows from operating activities:</b>		
Increase (decrease) in unrestricted net assets	\$ 287,871,840	\$ 135,644,681
Adjustments to reconcile change in unrestricted net assets to cash used by operating activities:		
Net realized (gain) loss on investments	(62,130,811)	(26,768,462)
(Income) loss on limited partnerships	(67,279,527)	(53,794,462)
Net unrealized (gain) loss on investments	(250,187,887)	(148,121,029)
Depreciation expense	283,503	292,930
(Increase) decrease in accrued interest and dividends	1,017,893	1,550,162
(Increase) decrease in other assets	(10,100,365)	198,465
Increase (decrease) in grants payable	(11,994,636)	2,039,364
Increase (decrease) in accounts payable and other liabilities	(2,850,270)	791,551
Increase (decrease) in deferred excise tax liability	5,152,504	2,804,788
Total adjustments	(398,089,596)	(221,006,693)
Net cash used by operating activities	(110,217,756)	(85,362,012)
<b>Cash flows from investing activities:</b>		
Proceeds from sales or redemptions of investments	559,640,735	447,153,709
Purchases of investments	(449,010,863)	(361,994,096)
Acquisition of building improvements	(212,643)	(8,570)
Net cash provided by investing activities	110,417,229	85,151,043
<b>Net increase (decrease) in cash</b>	199,473	(210,969)
Cash, beginning of year	4,061,550	4,272,519
Cash, end of year	<u>\$ 4,261,023</u>	<u>\$ 4,061,550</u>
<b>Supplemental disclosure of noncash investing activities:</b>		
Investment trades receivable (payable) at year end, net	<u>\$ 1,930,716</u>	<u>\$ 5,919,702</u>

The accompanying notes are an integral part of the financial statements.



## NOTES TO FINANCIAL STATEMENTS

### A. Mission and Grant Programs

The Charles Stewart Mott Foundation (the "Foundation") is a private grantmaking foundation established in 1926 in Flint, Michigan. The Foundation's mission is "to support efforts that promote a just, equitable and sustainable society." The Foundation's grantmaking activity is organized into four major programs: Civil Society, Environment, Flint Area and Pathways Out of Poverty. Other grantmaking opportunities, which do not match the major programs, are investigated through the Foundation's Exploratory and Special Projects program.

### B. Accounting Policies

The following is a summary of significant accounting policies followed in the preparation of these financial statements.

#### METHOD OF ACCOUNTING

The financial statements have been prepared on the accrual basis of accounting, which includes recognition of dividends, interest, and other income and expenses as earned or incurred. Trustee and Executive Committee grant actions are recognized as expense on the date of the action. Grants by the President or Executive Committee by specific authority conferred by the Trustees are recognized as expense on the date the authority is exercised. Grant expense is net of grant refunds.

#### INCOME TAXES

The Foundation follows the authoritative guidance on accounting for and disclosure of uncertainty in tax positions (Financial Accounting Standards Board (FASB) – Accounting Standards Codification 740) which requires the Foundation to determine whether a tax position is more likely than not to be sustained upon examination, including resolution of any related appeals or litigation processes, based on the technical merits of the position.

The Foundation has received a favorable determination letter from the Internal Revenue Service stating that it is exempt from federal income taxes under Section 501(a) of the Internal Revenue Code as an organization described in Sections 501(c)(3). However, unrelated business income is subject to taxation. There was no such tax liability in 2013 or 2012.

#### CASH EQUIVALENTS

Cash equivalents with original maturities of three months or less are reflected at market value and include short-term notes and commercial paper, which are included with investments.

#### CONCENTRATION OF CREDIT RISK

The Foundation maintains certain cash accounts, the balances of which, at times, may exceed federally insured limits. The Foundation has not experienced any losses in such accounts. Management believes the Foundation is not exposed to any significant credit risk on cash.

#### OTHER ASSETS

Included in other assets are prepaid pension expense and land and buildings that were purchased by the Foundation for charitable purposes and are recorded at cost.



## LAND, BUILDING AND IMPROVEMENTS

Land, building and improvements are recorded at cost. Upon sale or retirement of land, building and improvements, the cost and related accumulated depreciation are eliminated, and the resulting gain or loss is included in current income. Depreciation of building and improvements is provided over the estimated useful lives of the respective assets on a straight-line basis, ranging from 6 to 50 years. Depreciation expense for the year December 31, 2013, and 2012, was \$283,503 and \$292,930, respectively.

Costs of office furnishings and equipment are consistently charged to expense because the Foundation does not deem such amounts to be sufficiently material to warrant capitalization and depreciation.

A summary of land, building and improvement holdings at year end is as follows:

	2013	2012
Land	\$ 397,852	\$ 397,852
Building and improvements	9,357,158	9,368,035
Less accumulated depreciation	(6,234,283)	(6,174,300)
	<u>\$ 3,520,727</u>	<u>\$ 3,591,587</u>

## ESTIMATES

The preparation of financial statements in conformity with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities, and disclosure of contingent assets and liabilities at the date of the financial statements, and the reported amounts of revenues and expenses during the reporting period. Actual results could differ from those estimates.

## INVESTMENTS

Equity investments with readily determinable fair values, and all debt securities, are recorded on the trade date and are stated at market value based primarily on December 31 published quotations. Gains and losses from sales of securities are determined on an average cost basis.

Equity investments that do not have readily determinable fair values, representing amounts in venture capital and limited partnerships, are recorded on the trade date. These investments are stated at an estimate of fair value as determined in good faith by the general partner or fund managers. The Foundation believes the amounts recorded approximate fair value.

The Foundation's 18.4 percent investment in United States Sugar Corporation (USSC), a non-publicly traded security with no readily determinable fair value, is priced based on an independent valuation of the USSC stock on a non-marketable minority interest basis.

The Foundation is party to certain limited partnership agreements, whereby the Foundation is committed to invest future funds into these partnerships. As of December 31, 2013, the Foundation has \$348.7 million in outstanding limited partnership commitments, including both domestic and international partnerships.

Temporary investments in partnerships that are publicly traded and where the Foundation has no committed capital are included with equity securities and not limited partnerships for financial statement presentation.



## FUNCTIONAL ALLOCATION OF EXPENSES

The costs of operating the Foundation have been allocated among program-related, communications and administrative expenses (all of which are included with administration expenses on the Statement of Activities). Program-related expenses pertain principally to the direct programmatic grantmaking functions of the Foundation, such as reviewing proposals and awarding, monitoring and evaluating grants, whereas communications expenses include activities directly related to the Foundation's external communications efforts. Administrative expenses include all other nonprogram and noncommunications related operating expenses of the Foundation.

## INVESTMENT TRADES RECEIVABLE AND PAYABLE

Investment trades receivable represent investments that have been sold with a trade date in the current year but for which the funds have not been received until the subsequent year. The pending cash equivalent to be received from such trades is classified as an investment for balance sheet purposes. Investment trades payable represent investments that have been purchased with a trade date in the current year but for which the funds have not been sent until the subsequent year. This commitment to settle the trade is classified as a liability for balance sheet purposes.

## RECLASSIFICATIONS

Certain amounts in the 2012 statements have been reclassified to conform to the 2013 presentation.

## C. Investment Securities

The following is a summary of cost and approximate fair values of the investment securities held at December 31 (in thousands):

	2013		2012	
	Fair Value	Cost Basis	Fair Value	Cost Basis
Cash equivalents	\$ 30,678	\$ 30,677	\$ 58,160	\$ 58,106
Public equities	575,097	465,858	481,980	409,902
Fixed income securities	127,752	117,574	181,733	160,286
Limited partnerships	1,320,752	966,398	1,092,986	907,755
Nonpartnerships	502,429	355,857	468,891	377,545
Investment trades receivable	6,712	6,712	6,029	6,029
	<u>\$ 2,563,420</u>	<u>\$ 1,943,076</u>	<u>\$ 2,289,779</u>	<u>\$ 1,919,623</u>



Investments valued at Net Asset Value (NAV) as of December 31, 2013, consisted of the following:

	Fair Value	Unfunded Commitments	Redemption Frequency	Redemption Notice Period
Equity securities (a)	\$ 416,774,438	\$ —	Quarterly to Annual if applicable	5 days to 4 months if applicable
Limited partnerships (b)	<u>1,320,751,924</u>	<u>348,700,000</u>	Quarterly to Annual if applicable	5 days to 4 months if applicable
Total investments at NAV	<u>\$ 1,737,526,362</u>	<u>\$ 348,700,000</u>		

(a) This category includes investments in real estate funds, hedge funds and international equity. The NAV of the real estate funds is as provided by the fund and determined using the fair value option or depreciable cost basis of the underlying assets. The NAV of the hedge and international equity funds is as provided by the fund using various observable and unobservable market valuation techniques as allowed by the FASB. The majority of the hedge funds offer quarterly to annual liquidity options that require advance notice from five business days to four months, with various "lock-up" and "gate" provisions, while the real estate funds do not offer redemption options.

(b) This category includes investments in private equity funds, public equity funds, hedge funds, real estate funds and energy funds. The NAV of these funds is as provided by the general partner or fund manager using various observable and unobservable market valuation techniques as allowed by the FASB. The majority of the hedge funds offer quarterly to annual liquidity options that require advance notice from five business days to four months, with various "lock-up" and "gate" provisions, while the private equity, real estate and energy funds do not offer redemption options. The public equity funds offer a monthly redemption frequency with 30 days' notice.

See footnote D for additional information regarding fair value measurements.

Due to the various liquidity limitations on the above referenced funds, the Foundation maintains a significant portion of its investments in highly liquid and other Level 1 assets so as to ensure that grantmaking and administrative expense needs are covered into the foreseeable future.

The Foundation has significant amounts of investment instruments. Investment securities, in general, are exposed to various risks, such as interest rate, credit and overall market volatility. Due to the level of risk associated with certain investment securities, it is reasonably possible that changes in the values of investment securities will occur in the near term and that such changes could materially affect the amounts reported in the financial statements.





#### D. Fair Value Measurements

Fair Value is defined as the exchange price that would be received for an asset or paid to transfer a liability (an exit price) in the principal or most advantageous market for the asset or liability in an orderly transaction between market participants on the measurement date. In accordance with the authoritative guidance on fair value measurements and disclosures under generally accepted accounting principles (GAAP), the Foundation adopted a framework for measuring fair value under GAAP that establishes a fair value hierarchy, which requires an entity to maximize the use of observable inputs and minimize the use of unobservable inputs when measuring fair value. The standard describes three levels of inputs that may be used to measure fair value:

**Level 1** — Quoted market prices in active markets for identical assets or liabilities.

**Level 2** — Observable inputs other than Level 1 prices such as quoted prices for similar assets or liabilities; quoted prices in markets that are not active; or other inputs that are observable or can be corroborated by observable market data for substantially the full term of the assets or liabilities.

**Level 3** — Unobservable inputs that are supported by little or no market activity and that are significant to the fair value of the assets or liabilities. Level 3 assets and liabilities include financial instruments for which fair value is determined using pricing models, discounted cash flow methodologies or similar techniques, as well as instruments for which the determination of fair value requires significant management judgment or estimation. This category generally includes certain private debt and equity instruments and alternative investments. Also included in Level 3 are investments measured using NAV per share, or its equivalent, that can never be redeemed at the NAV or for which redemption at NAV is uncertain due to lock-up periods or other investment restrictions.

Generally, assets held at the Foundation's custodian, Comerica Bank, include cash equivalents, U.S. government obligations, corporate bonds and equity securities, which are publicly traded in active markets and are considered Level 1 assets. Equity securities purchased and held directly by the Foundation include private equities, hedge funds, real estate funds and energy funds.

The following discussion describes the valuation methodologies used for financial assets measured at fair value. The techniques utilized in estimating the fair values are affected by the assumptions used, including discount rates and estimates of the amount and timing of future cash flows. Care should be exercised in deriving conclusions about the Foundations' financial position based on the fair value information of financial assets presented below.

The valuation of nonpublic or alternative investments requires significant judgment by the General Partner or Fund Manager due to the absence of quoted market values, inherent lack of liquidity and the long-term nature of such assets. Private equity investments are valued initially based upon transaction price excluding expenses. Year-end valuations are as provided by the General Partner or Fund Manager, which are tied to capital statements and/or audited financial statements when available and are carried at NAV or its equivalent. These valuations include estimates, appraisals, assumptions and methods that are reviewed by the Foundation's independent investment advisors and management.



The following table presents the investments carried on the statement of financial position by level within the valuation hierarchy as of December 31, 2013:

Investment Type	Level 1	Level 2	Level 3	Total
Cash equivalents	\$ 30,677,696	\$ —	\$ —	\$ 30,677,696
Public equities	575,097,218	—	—	575,097,218
Fixed income securities	127,751,664	—	—	127,751,664
Limited partnerships	—	—	1,320,751,924	1,320,751,924
Nonpartnerships	—	—	502,429,137	502,429,137
Investment trades receivable	6,711,870	—	—	6,711,870
<b>Total</b>	<b>\$ 740,238,448</b>	<b>\$ —</b>	<b>\$ 1,823,181,061</b>	<b>\$ 2,563,419,509</b>

A summary of Level 3 activity for the year is as follows:

<b>Balance, December 31, 2012</b>	\$ 1,561,876,634
Purchases	194,416,789
Sales	(234,874,184)
Realized gains/Partnership income	77,413,140
Unrealized gains	224,348,682
<b>Balance, December 31, 2013</b>	<b>\$ 1,823,181,061</b>

The following table presents the investments carried on the statement of financial position by level within the valuation hierarchy as of December 31, 2012:

Investment Type	Level 1	Level 2	Level 3	Total
Cash equivalents	\$ 58,160,123	\$ —	\$ —	\$ 58,160,123
Public equities	481,980,259	—	—	481,980,259
Fixed income securities	181,733,284	—	—	181,733,284
Limited partnerships	—	—	1,092,985,976	1,092,985,976
Nonpartnerships	—	—	468,890,658	468,890,658
Investment trades receivable	6,028,853	—	—	6,028,853
<b>Total</b>	<b>\$ 727,902,519</b>	<b>\$ —</b>	<b>\$ 1,561,876,634</b>	<b>\$ 2,289,779,153</b>



A summary of Level 3 activity for the year is as follows:

<b>Balance, December 31, 2011</b>	<b>\$ 1,430,356,221</b>
Purchases	219,932,532
Sales	(238,328,908)
Realized gains/Partnership income	61,957,961
Unrealized gains	87,958,828
<b>Balance, December 31, 2012</b>	<b><u>\$ 1,561,876,634</u></b>

Transfers in and out of Level 3 assets are as denoted by “Purchases” and “Sales” in the summary of Level 3 activity schedules above, whereas the funds used to make purchases of Level 3 assets are generally made from liquid (Level 1) funds and likewise, sales or maturities of Level 3 assets are generally received as cash (Level 1) and deposited into liquid fund assets. Purchases of Level 3 assets are made in accordance with the Foundation’s investment policy to maintain targeted levels of such assets, which are balanced against the liquidity needs of the Foundation for purposes of making grants and covering operating expenses, and to achieve an overall growth in investments sufficient to meet various required distribution calculations. Sales and maturities represent a combination of predesignated capital distributions from partnerships whose specific timing is generally determined by the partnership but that, overall, is an expected and integral part of the partnership agreement. Other sales of Level 3 assets, whereby such is not predesignated, are based on the Foundation’s liquidity needs, maintaining targeted levels of various assets as proscribed by the investment policy, and in certain instances where the Foundation and its investment committee decide to take funds out of a given investee due to poor performance or otherwise better opportunities deemed available with other investees.

#### E. Excise Tax and Distribution Requirements

The Foundation is exempt from federal income taxes under Section 501(c)(3) of the Internal Revenue Code (IRC), but is subject to a 2 percent (1 percent if certain criteria are met) federal excise tax on net investment income, including realized gains, as defined in the IRC. The current excise tax is provided at 1 percent for 2013 and 2 percent for 2012. The deferred excise tax provision is calculated assuming a 2 percent rate and is based on the projected gains/losses that assume complete liquidation of all assets.

	<b>2013</b>	<b>2012</b>
Excise tax payable	\$ 142,682	\$ 600,000
Deferred excise tax liability	12,095,283	6,942,779
	<u>\$ 12,237,965</u>	<u>\$ 7,542,779</u>

Excise tax payments of \$1,960,000 and \$1,200,000 were paid in 2013 and 2012, respectively.

IRC Section 4942 requires that a private foundation make annual minimum distributions based on the value of its noncharitable use assets or pay an excise tax for the failure to meet the minimum distribution requirements. For the year ended December 31, 2013, the Foundation made qualifying distributions in excess of the required minimum distribution by approximately \$8.4 million. The Foundation has \$78.3 million in prior year excess distributions, resulting in a net accumulated over-distribution of \$86.7 million to be carried forward to 2014.



## F. Grants Payable

Grants payable at December 31, 2013, are expected to be paid as follows:

	Payable in Year Ending December 31,			
	2014	2015	2016	Total
<b>PROGRAMS</b>				
Civil Society	\$ 4,308,645	\$ 822,000	\$ 130,000	\$ 5,260,645
Environment	1,023,535	260,000	—	1,283,535
Flint Area	425,037	31,000	6,000	462,037
Pathways Out of Poverty	1,795,811	467,500	50,000	2,313,311
Other*	30,000	30,000	—	60,000
Grants payable	7,583,028	1,610,500	186,000	9,379,528
Less: Unamortized discount	—	99,792	17,016	116,808
	<u>\$ 7,583,028</u>	<u>\$ 1,510,708</u>	<u>\$ 168,984</u>	<u>\$ 9,262,720</u>

In addition, the Foundation has also approved grants that require certain conditions to be met by the grantee. Conditional grants excluded from the Foundation's financial statements totaled \$1,173,000 and \$2,479,959 as of December 31, 2013 and 2012, respectively.

Grant activity for the years ended December 31, 2013 and 2012, was as follows:

	2013	2012
<b>Undiscounted grants payable, January 1</b>	\$ 21,510,305	\$ 19,471,161
Grants approved	102,311,512	89,680,445
	123,821,817	109,151,606
Less grants paid by program:		
Civil Society	24,954,406	15,843,636
Environment	11,513,419	7,977,874
Flint Area	41,598,500	32,767,840
Pathways Out of Poverty	33,464,290	28,360,191
Other*	2,911,674	2,691,760
	114,442,289	87,641,301
<b>Undiscounted grants payable, December 31</b>	<u>\$ 9,379,528</u>	<u>\$ 21,510,305</u>

\*Includes Exploratory, Special Projects and Matching Gifts Program.



## G. Pension and Other Postretirement Benefits

The Foundation sponsors a qualified defined benefit pension plan covering substantially all employees along with an unfunded nonqualified plan for restoration of pension benefits lost due to statutory limitations imposed upon qualified plans. In addition, the Foundation sponsors an unfunded postretirement medical plan for all eligible employees. The qualified defined benefit pension plan is funded in accordance with the minimum funding requirements of the Employee Retirement Income Security Act.

Basic information is as follows:

Amounts in (\$000)	Pension Benefits		Postretirement Health-Care Benefits	
	2013	2012	2013	2012
Benefit obligation at December 31	\$ (51,727)	\$ (53,862)	\$ (15,144)	\$ (16,059)
Fair value of plan assets at December 31	55,445	46,209	—	—
Funded status at December 31	<u>\$ 3,718</u>	<u>\$ (7,653)</u>	<u>\$ (15,144)</u>	<u>\$ (16,059)</u>
Amounts recognized in the statements of financial position:				
Prepaid benefit included with other assets	\$ 9,716	\$ —	\$ —	\$ —
Accrued benefit liability included with accounts payable and other liabilities	(5,998)	(7,653)	(15,144)	(16,059)
Net amount recognized	<u>\$ 3,718</u>	<u>\$ (7,653)</u>	<u>\$ (15,144)</u>	<u>\$ (16,059)</u>
Employer contributions	\$ 2,748	\$ 4,751	\$ 367	\$ 289
Benefit payments	\$ (1,879)	\$ (2,106)	\$ (367)	\$ (289)
Components of net periodic benefit cost:				
Service cost	\$ 1,538	\$ 1,375	\$ 600	\$ 535
Interest cost	2,051	2,080	664	581
Expected return on assets	(3,502)	(2,938)	—	—
Amortization of net loss	1,502	1,535	235	63
Amortization of prior service cost	55	55	128	128
Net periodic benefit cost	<u>\$ 1,644</u>	<u>\$ 2,107</u>	<u>\$ 1,627</u>	<u>\$ 1,307</u>

### BENEFIT OBLIGATIONS

The accumulated benefit obligation of the nonqualified pension plan was \$5,997,639 and \$4,749,453 as of December 31, 2013 and 2012, respectively. The accumulated benefit obligation of the qualified plan was \$41,570,058 and \$43,672,995 as of December 31, 2013 and 2012, respectively.



The assumptions used in the measurement of the Foundation's benefit obligations and net periodic benefit costs are as follows:

	Pension Benefits		Postretirement Health-Care Benefits	
	2013	2012	2013	2012
Discount rate (benefit obligation)	4.70%	3.90%	5.10%	4.20%
Discount rate (net periodic cost)	3.90%	4.50%	4.20%	4.40%
Expected return on plan assets	7.75%	7.75%	N/A	N/A
Compensation increase (benefit obligation)	4.00%	4.00%	N/A	N/A
Compensation increase (net periodic cost)	4.00%	4.00%	N/A	N/A

For measurement purposes, an initial annual rate of 7 percent for Pre-65 and 5 percent for Post-65 in the per capita cost of health care was used. These rates were assumed to decrease gradually each year to an ultimate rate of 4.5 percent by year 2019.

#### ASSET HOLDINGS

The investment strategy is to manage investment risk through prudent asset allocation that will produce a rate of return commensurate with the plan's obligations. The Foundation's expected long-term rate of return on plan assets is based upon historical and future expected returns of multiple asset classes as analyzed to develop a risk-free real rate of return for each asset class. The overall rate of return for each asset class was developed by combining a long-term inflation component, the risk-free real rate of return and the associated risk premium.

A summary of asset holdings in the pension plan at year end is as follows:

Asset Class	2013		2012	
	Percent of Assets	Target Allocation	Percent of Assets	Target Allocation
Domestic stock	45.0%	45.0%	45.6%	45.0%
International stock	15.1%	15.0%	16.3%	15.0%
Real estate	5.0%	5.0%	5.0%	5.0%
Real asset	5.0%	5.0%	5.0%	5.0%
Debt securities	29.9%	30.0%	28.1%	30.0%
<b>Total</b>	<u>100.0%</u>	<u>100.0%</u>	<u>100.0%</u>	<u>100.0%</u>



The following table presents the pension assets by level within the valuation hierarchy as of December 31, 2013:

Investment Type	Level 1	Level 2	Level 3
Equity securities	\$ —	\$ 33,327,869	\$ —
Real estate	—	2,758,411	—
Real asset	—	2,773,725	—
Debt securities	—	16,585,293	—
<b>Total</b>	<u>\$ —</u>	<u>\$ 55,445,298</u>	<u>\$ —</u>

#### EXPECTED CONTRIBUTIONS

The Foundation expects to contribute \$2,143,440 to its pension plans and \$560,000 to its postretirement medical plan in 2014. For the unfunded plans, contributions are deemed equal to expected benefit payments.

#### EXPECTED BENEFIT PAYMENTS

The Foundation expects to pay the following amounts for pension benefits, which reflect future service as appropriate, and expected postretirement benefits:

Year	Pension Plans	Postretirement Health Care
2014	\$ 2,983,440	\$ 560,000
2015	3,083,440	620,000
2016	3,053,440	620,000
2017	3,113,440	670,000
2018	3,103,440	660,000
2019-2023	16,277,200	3,990,000

#### DEFINED CONTRIBUTION 401(k) PLAN

In addition to the above, the Foundation maintains a 401(k) defined contribution retirement plan for all eligible employees. The Foundation matches employee contributions up to \$3,000 per year. For the years ending December 31, 2013 and 2012, the Foundation contributed \$207,723 and \$215,870, respectively.



## H. Subsequent Events

The Foundation evaluated its December 31, 2013, financial statements for subsequent events through July 1, 2014, the date the financial statements were available to be issued. The Foundation is not aware of any subsequent events that would require recognition or disclosure in the financial statements.

## Administration and Investment Expenses

	Administration Total		Investment Total	
	2013	2012	2013	2012
Salaries	\$ 7,733,299	\$ 7,494,763	\$ 2,164,096	\$ 2,224,297
Other personnel costs	4,547,527	4,637,724	794,854	806,162
Operations	1,401,486	1,397,871	313,040	308,733
Professional fees	930,814	1,044,440	2,103,619	2,168,671
Travel and business expenses	893,818	901,779	86,913	72,748
Publications and contract services	143,590	197,640	—	—
	<u>\$ 15,650,534</u>	<u>\$ 15,674,217</u>	<u>\$ 5,462,522</u>	<u>\$ 5,580,611</u>







The background of the entire page is a close-up photograph of tall, thin grasses. The grasses are a mix of green and light brown/tan, suggesting they might be in a field or meadow. The focus is soft, with some blades in sharp focus in the foreground and others blurred in the background. A semi-transparent white horizontal bar is positioned across the middle-right of the image, containing the text "TRUSTEES & STAFF" in a bold, blue, sans-serif font.

## **TRUSTEES & STAFF**



## IN MEMORIAM



PHOTO: COURTESY OF THE WHITE FAMILY

*It is with great sadness that the C.S. Mott Foundation marked the passing of Claire Mott White on March 24, 2014. Elected to the Foundation's Board of Trustees in 1997, she was a granddaughter of Charles Stewart Mott, the daughter of C.S. Harding Mott, and the wife of William S. White, chairman, president and CEO of the Foundation.*

*Though she came from a prominent family, Claire was a private person who always put the needs and interests of family and friends before her own. Family members describe her as a humble servant who generously shared her time, talent and good fortune with others. As a Trustee, she was known for her common sense and ability to ask questions that went directly to the heart of whatever issue was being discussed.*

*An accomplished artist and ceramics instructor, Claire served on many local and national*

*boards and was the recipient of several awards, including the Community Foundation of Greater Flint's 2006 Libby Award for her work on behalf of women and girls. Along with her husband, Bill, she shared in the 2007 Guvvy Award — the Michigan Governor's Award — for lifetime achievement in supporting the arts and culture. In 2005, the Flint Institute of Arts, where she had served as a board member since 1997, named its renovated studio wing in her honor, acknowledging her lifelong commitment to the museum and its school.*

*She twice served as chair of the board for her church in Flint. Known for her quiet leadership, positive energy and gentle guidance, she also was a great asset to many national and local nonprofits working on behalf of young people.*

*She is fondly remembered and greatly missed.*



## TRUSTEE NEWS

On January 1, 2014, Lizabeth Ardisana joined the Foundation's Board of Trustees. She is co-founder and principal owner of ASG Renaissance, a Dearborn, Michigan-based technical and communications services firm.

Prior to founding ASG Renaissance, Ardisana was an engineer for the Ford Motor Company. Daughter of a career military officer, she spent her early years living in the Philippines, Japan and Germany, as well as Illinois, Alabama and Texas. As a business owner and member of numerous local, state and national boards, she brings a wealth of knowledge and practical experience to the Foundation's Board.

At the time of Ardisana's election, Trustees A. Marshall Acuff Jr., John Morning and William H. Piper each were re-elected for three-year terms.

John K. Butler, who was a vice president, director and investment manager with Mairs and Power, Inc., in St. Paul, Minnesota, became a member of the Foundation's Investment Committee in January 2014. John has been a trustee of the Patrick and Aimee Butler Family Foundation since 1990. Aimee Butler was a daughter of Charles Stewart Mott.

Alan Van Noord, who also joined the Investment Committee, retired as chief investment officer of the Pennsylvania Public School Retirement System

in 2013, where he served since 2002. Prior to that, he was director of the Bureau of Investments and chief investment officer of the State of Michigan Retirement System.

## STAFF NEWS

Kathryn Thomas was named vice president of communications in February 2014. Previously a senior communications officer for the Robert Wood Johnson Foundation in Princeton, New Jersey, Thomas brings extensive experience in strategic communications and policy advocacy to her new role with Mott. She succeeds Carol D. Rugg, who retired in December 2013 after a 28-year career with the Foundation.

Our best wishes go with Jeanette "Gay" McArthur, who retired in September 2014 as Library Administrative Assistant after almost 15 years with the Foundation.

This year, we also bid farewell to Jack A. Litzenberg, who died May 6, 2014, in Grand Blanc, Michigan. For nearly three decades until his retirement in 2012, Jack was a leading force in the Foundation's efforts to address poverty and help low-income people succeed in education and the workforce. In 1994, the Council on Foundations honored Jack with its Robert W. Scrivner Award for innovation and creativity in grantmaking.



# TRUSTEES AND STAFF

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\*The Members of the corporation are Frederick S. Kirkpatrick, Tiffany W. Lovett, Maryanne Mott, William H. Piper, Marise M.M. Stewart, Ridgway H. White and William S. White.

+Serves as presiding/lead outside director.

Board and committees lists are current as of September 30, 2014.

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### Loaned Staff

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Foundation Liaison  
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### Contract Employees/Consultants

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Grants Administration

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Civil Society program (South Africa)

Amy C. Shannon  
Environment program

Svitlana Suprun  
Civil Society program (Belarus, Moldova, Ukraine)

Staff list is current as of October 31, 2014.

For an updated staff list, please visit our website at [www.mott.org](http://www.mott.org).











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