Charlevoix Historical Society
Annual Report
2017

MISSION STATEMENT

Enriching Charlevoix culture through preservation, education and engaging experiences celebrating our history

HISTORICAL SOCIETY OFFICERS AND BOARD OF DIRECTORS

President: Denise Fate
Vice-President: Chuck Cleland
Secretary: Kay Heise
Treasurer: Jamie McLane
Finance Chair: Craig Mann

Directors: Virginia Cash, Tom Darnton, Phyllis Elzinga, Edward O’Neill, Amanda Wilkin

Advisory Board: Dr. Jack MacKenzie, Steve Paterka

Museum Curator and Editor: David L. Miles

Museum Curator of Collections: Jacob Thomas, Trevor Dotson
Message from the President

The year 2017 marked a major milestone for us: 125 years since the arrival of the railroad in Charlevoix and opening of the Depot. We celebrated in style with "Depot 125", recreating the 1892 experience on June 25-26. An estimated 1,000 guests joined us at the Train Depot for a variety of family activities the afternoon of June 25, which included cyclists in costume on bicycles from the era and historic tours featuring authentic characters arriving and departing Charlevoix on the train in 1892. We were grateful to have the participation of Charlevoix Circle of Arts Armchair Theatre, the Charlevoix City Band, and Charlevoix High School performing arts students, along with other entertainment. To add to the scenery, railroad tracks were painted where they once lay on the road in front of the depot, much to the delight of locals.

On June 26, a proclamation ceremony was held in the Heritage Gardens with invited guests and officials Mayor Luther Kurtz, City Manager Mark Heydlauff and Michigan State Senator Triston Cole. The Society was presented certificates from the City and the State marking the occasion.

The Society was thrilled to learn in May that the Earl Young documentary 'The Wizard of Boulder Park', which we partnered with Bon Ami filmworks to produce, was nominated by the Michigan chapter of the National Academy of Television Arts & Sciences for the 2016 Emmy for Best Historical Documentary. Producer Anne Belanger was presented with the award in Detroit in June. A replica Emmy statuette is proudly on display at the Museum at Harsha House.

The newly formed Charlevoix Cultural Corridor was formally launched with a combined Open House party on July 5. Guests took part in special activities at Charlevoix Circle of Arts, toured the Museum at Harsha House and then enjoyed Jazz at the Library.

We were pleased to partner with the Northern Michigan Railroad Club on a train show featuring steam era locomotives at the depot in late July, which enjoyed good attendance over three days. Following this event, the Society hosted the Charlevoix Photography Club's Annual Fine Art Photography Exhibition. The train depot is growing in popularity for events, and we experienced the most income we have had from fees for private events.

Bus and walking tours of the city and the Earl Young Mushroom Houses continued as interest in these sites is unwavering.

The other significant activity for the year was the roll-out of our capital campaign, Embrace.Preserve.Cherish. We had a wonderful committee to steer this challenging process and get it off the ground in a professional manner, for which I am extremely appreciative.

I wish to thank our board for their continuing dedication and hard work guiding our organization, our staff for their loyalty and terrific work, and our members for their support year after year.

Denise Fate, President
Curator’s Report #1

2017 was a year of unending activity. When fellow curator Jacob Thomas announced in late January that he would be leaving in March to accept a museum directorship in Montana, we went into overdrive to complete a new 142 pp. softbound book, titled “Charlevoix the Beautiful: The City on Three Lakes,” which we had just begun in December of 2016. The book arrived in early June, and the first printing sold out by the end of the year. It has been mailed all over the country. This is the tenth publication I have written for the Society since 2002.

Before Jacob left, he completed a magnificent exhibit on our railroad history that first hung on the Charlevoix Public Library’s Community Room corridor exhibit walls, then was transferred for permanent exhibit into the depot where, for the first time, visitors can learn of the importance of the arrival of the railroad and how it changed Charlevoix forever.

The 125th anniversary celebration of the railroad’s arrival in June was a rousing success. My contribution was to supervise the historic tours of the depot, conducted by three Society volunteers, and integrate them into historic reenactments by members of the Charlevoix Circle of Arts Armchair Theatre (see center photo above). The tours and ‘historic encounters’ turned out to be one of the most popular events of the day, with several hundred people participating.

My annual illustrated lecture program focused naturally enough on the year’s theme of Charlevoix’s railroad history, given first to a full house at the depot in June, then to a standing room only encore showing at the library in August.

In co-sponsorship with the Library, the Society presented a program in July that featured Frank Mays, one of the two survivors of the sinking of the lake freighter Carl D. Bradley off Beaver Island in November of 1958. In his 80s now, Mr. May held the overflow audience, estimated at 250, in thrall as he related the events of that near-fatal night.

The weekly historic photo/text feature which I prepare for the Charlevoix Courier called “Looking Back,” initiated in 2011, reached a milestone of 300 entries on May 12. We regularly get requests from readers for topics of interest.

Our step-on bus tours of the city and walking tours of the Earl Young houses continued on their successful path and interest is already strong for 2018. The 28-pp. guide to the Earl Young structures which we introduced in May of 2015 reached the 2500 sales mark this year, much to our astonishment.

And the receipt of the replica Emmy for our major participation in the production of the "Wizard of Boulder Park" was a one of a kind thrill. My contribution was in the role of historical consultant and photo co-ordinator, plus being in the film as a “talking head.”

2018 promises to be an equally busy and rewarding year for the Society.

David L. Miles, Curator of Photos and Documents
Curator’s Report #2

As the new Curator of Collections at the Historical Society, I have been able to easily transition into my new role thanks to my predecessor Jacob Thomas’ diligent work in creating more suitable storage conditions while also defining storage locations more clearly in our database. Jacob catalogued hundreds of artifacts, but there are still many more that need to be done. Part of the cataloguing process includes having photographs of each artifact. Unfortunately, many of the Society’s artifacts have not been photographed, and I have been working to resolve this issue.

The 2017 Historical Society programs celebrated the 125th anniversary of the completion of the Depot and the arrival of the first train in Charlevoix. In May, I kicked off the year of “Depot 125” with a program about the advent of the railroad in Michigan and 19th century rail travel. The following month, I presented the program at the Norwood Historical Society.

I spent much of my first few months preparing for one of the Society’s largest events to date, “Depot 125: An 1892 Experience Family Gala Celebration.” The event simulated Charlevoix in 1892 when the first train arrived. There were guided tours of the Depot by actors in period clothing posing as passengers and Depot employees, bands, a barbershop quartet, horse-drawn wagon rides, Castle Farms model train rides, historic children’s games/crafts, garden tours and antique bicycles. The weather was perfect and the event was very well attended. The success of such an event would not be possible without the volunteer hours of many groups, such as the Charlevoix Public Library, Charlevoix Circle of Arts Armchair Theatre group, Norwood Historical Society, Charlevoix Garden Club, Charlevoix City Band, Michigan Wheelman and more.

2017 also saw the formation of the Charlevoix Cultural Corridor, which includes the Society, Charlevoix Circle of Arts and the Charlevoix Public Library. The objective of the Corridor is to highlight cultural offerings close to downtown, and increase awareness of the organizations and what they contribute to the community. The Cultural Corridor Launch Party and Open House took place in early July. The Society served refreshments on the porch and promoted the release of our newest publication “Charlevoix the Beautiful: The City on Three Lakes” with a book signing by Curator David Miles. A Holiday Fest was held in early December. The Society featured historic photographs and home videos from the 1930s depicting winter scenes and activities, along with another book signing of the new publication. A horse drawn wagon took visitors between the three establishments. Even though it had snowed heavily and was bitter cold, the event was well attended.

Like my predecessor, I have been tasked with graphic design and marketing work at the Society. I have added more of our merchandise to our website for online purchase and will be working to promote sales of our historic photos which we can print in-house. Our Facebook page, which was started in April 2016, is an invaluable tool for providing information about upcoming events while also promoting our wonderful exhibits and collections. Since my employment in early March 2017 our Facebook followers have increased from 190 to over 600.

Finally, I want to thank everyone from my co-workers, board members and the public for the warm welcome to Charlevoix. The most rewarding part of my job is discussing the great history of Charlevoix and helping visitors with their research queries.

Trevor Dotson, Curator of Collections
**Museum Committee**

The Museum Committee is made up of six subcommittees: Acquisition, Preservation, Restoration, Exhibit, Special Depot Exhibits, and Adopt-a-Painting. Its goal is to organize and preserve our artifacts and plan for the future. It also advises the Board of restoration needs and creates exhibits for the public. The Museum Chair position was unfilled during 2017, with Chuck Cleland acting as board liaison on museum matters.

**Membership Report**

The membership secretary is responsible for maintaining accurate lists of current members by category, and for issuing notices for membership renewal and dues payable. Membership dues are a significant source of income for the Society which help cover day-to-day expenses. They are paid on an annual basis for the calendar year beginning January 1 and ending December 31.

Life Members ($1000): 115  
Annual Members (Individual $25 or Family $50*): 244  
**Total membership: 359**

*Note: Family memberships are counted as one member.

Within our membership are those who wish to support the organization with additional donations and become:

- Ralph Hamilton Circle Members (annual gift of $150): 51  
- Patrons* (annual gift from $350 to $2000 or more): 46

*includes membership in the Ralph Hamilton Circle

Often families and organizations choose to honor loved ones with honorary gifts or memorials. These donations are greatly appreciated and help us to continue our work in preservation and restoration. These donors might or might not be members of the Charlevoix Historical Society.

Kay Heise, Membership Chair

**Volunteer of the Year**

Our Volunteer of the Year recognition went to the Depot 125 planning committees who spent countless hours over many months preparing for this June experience. The event committee included Dan Barron, Cynthia Boss, Linda Boss, Chuck Cleland, Trevor Dotson, Hugh Hansen, Jack Mackenzie, Dave Miles, Sandy Miles, Audrey Shapiro, Amanda Wilkin, Jayne Winchester, and Ev Wujcik. The committee staging an elegant tea following the proclamation ceremony for our guests, including patrons and Ralph Hamilton members, was comprised of: Laura Podob, Kay Heise, Mary Lynn Heid and Nancy Porter.
These committees, along with a significant number of volunteers and partners who worked during Depot 125, successfully mounted one of the largest and most complex events the Society has ever held. The Charlevoix Courier was most helpful also in providing press coverage leading up to and following the events. The numerous performers taking part in the attractions and activities all contributed to a highly successful and enjoyable historical experience for the community.

Denise Fate, President

Publicity and Marketing

In 2017, the Historical Society was not only more recognized in the community but also statewide and nationally. Our Circle Michigan membership, which promotes the Society offerings at group tour trade shows across the nation, has brought in many additional step-on guided bus tours of the Earl Young Mushroom Houses and the city. More than 5000 of the Mushroom House overview brochures were given out and more than 500 of the Mushroom House guide books were sold in 2017.

Collaborative efforts with the Charlevoix Cultural Corridor created additional awareness of the Historical Society. Joining forces with similarly charged organizations like the Charlevoix Public Library and Charlevoix Circle of Arts significantly increases our reach. In 2017 we held joint events such as the July Open House and Holiday Fest in December, distributed hundreds of rack cards regionally, and the three organizations have been placed together on the new wayfinding signage throughout town.

The Society placed an advertisement in the Visitors Guide and Travel Planner which printed more than 50,000 copies between them. The digital versions were also viewed over 50,000 times.

The Society’s email newsletter had a higher than average open rate, and by listing events, programs and opportunities has helped those who are more digitally inclined to keep informed of the Society’s offerings.

The Facebook page has seen its greatest successes thus far in 2017, with a fan base of more than 500 people and some posts’ engagements reaching thousands of people.

Marketing for Depot 125 included far-reaching avenues such as regional news shows as well as the statewide Pure Michigan radio program.

Curator Trevor Dotson wrote a few delightful blog posts for the Charlevoix Convention & Visitors Bureau to promote the history of Charlevoix. The Society gets credit for the blogs and this avenue helps increase the reach to a different market.

The “Wizard of Boulder Park” documentary continued to air on Michigan PBS in 2017 and was so well received it won a statewide Emmy award.

In the Museum store at Harsha House, merchandising, reduction of inventory and creation of more focus on historic photos and original books contributed to a very successful sales year.

The Society’s website has been updated to include more Society information and to allow the sale of practically all of our merchandise. The site generated more traffic in 2017 than was seen in prior years.

Promotion and publicity will continue to be an important focus for the Historical Society in 2018.

Amanda Wilkin and Phyllis Elzinga, Publicity Chairs
Buildings and Grounds

Interior and exterior renovations were completed at the Museum at Harsha House during 2017 with the support of capital improvement grants from Michigan Council for Arts and Cultural Affairs (MCACA). The first major phase included interior office renovations, which were finished early in the year. A new roof and trusses and other carpentry followed in June for a total cost of $37,379. A FY17 MCACA capital improvement grant of $8,899 supported this project. With a subsequent FY18 MCACA grant of $10,750 awarded in the fall, work to replace dormer wood shakes and make other repairs to the exterior was completed by year end. Funding for the project also came from private donations to the Embrace.Preserve.Cherish. Capital Campaign. Exterior painting will follow in the spring, wrapping up the currently planned exterior renovations.

Denise Fate, President

South Pier Lighthouse

The only activity to take place at the South Pier Lighthouse this year was the installation of an interpretive sign mounted on the base of the lighthouse. It was funded in part with a $900 SUN Fund grant from the Charlevoix County Community Foundation. The remaining costs of $1340 were funded from Lighthouse reserves.

Denise Fate, President
The theme for the Society’s programs this year was the coming of the railroad in 1892 and its impact on Charlevoix. It commenced with our annual Valentine’s Potluck dinner at the Depot on February 8 with our traditional vintage film showing, this time with the immortal 1926 Buster Keaton silent classic The General.

This was followed on May 2 with new Curator Trevor Dotson kicking off the year’s themed events at the Depot with a fully illustrated presentation called “Laying Tracks: Michigan Railroads in the 19th Century.”

Curator David Miles followed on June 7 with a similar program, but this one focusing locally with “The Coming of the Railroad and Its Impact on Charlevoix.” Both programs drew substantial crowds.

June 25 and 26 were devoted to the major celebrations marking the 125th anniversary of the railroad’s arrival. The community-wide celebration on the 25th brought approximately 1000 people to the Depot for a festive afternoon and activities for all ages. The actual anniversary date, the 26th, was devoted to a small but impressive ceremony in the Depot Heritage Gardens complete with honor guard provided by the members of the Charlevoix Coast Guard Station, and attended by both local and state officials, followed by a reception.

On July 5 we participated in the formal debut of the recently designated Charlevoix Cultural Corridor, in conjunction with Charlevoix Circle of Arts and the Charlevoix Public Library, with a late afternoon open house/launch party attended by many guests.

On July 11, the Society co-sponsored with the Library a program by Frank Mays, a survivor of the 1958 sinking of the freighter Carl D. Bradley. So many people showed up at the library that many had to be turned away, probably the largest audience ever to assemble in the Community Room to that point.

July 21 saw the annual Venetian Festival Fireworks Potluck Dinner for Society members and their guests at the Depot, always a well-attended event.

At the end of the month, over three days beginning July 28, the Northern Michigan Railroad Club set up a model train show at the Depot.

On August 8, David Miles gave an encore presentation of his railroad program at the Library that brought in a standing room only audience.

Three days later, the Charlevoix Photography Club set up its 9th Annual Fine Art Photography Exhibition at the Depot that ran for four days.

On September 13, an encore showing of the Emmy-award winning documentary “The Wizard of Boulder Park” took place at Charlevoix Cinema III, with a Q & A session afterward that featured the film’s producer Anne Belanger.

The year concluded with our always lovely, nicely attended annual Christmas dinner at the Grey Gables Inn on December 5.

Chuck Cleland, Program Chair
Finance Committee

The Charlevoix Historical Society was again financially successful in 2017. This was perhaps the most successful year in our history. Thanks to our generous members and patrons for their gifts. Additional funds were provided by exceptional sales of books and other items in the museum gift shop, bus and walking tours, and Depot event fees.

Excluding of funds received as a result of the Capital Campaign (see below), the Society’s gross income totaled approximately $109,000 which was just in excess of the year’s operating expenses. Additionally, almost $60,000 was spent on restoration and improvements to the Harsha House and Depot. Our 2018 budget includes over $120,000 in additional restoration expenses for these two iconic structures.

Craig Mann, Finance Committee Chair


Early in the year a committee was assembled to develop a capital campaign to meet the Society’s growing funding needs to protect our most treasured assets: the Museum at Harsha House, the Train Depot, the South Pier Lighthouse, and our collection of photos and artifacts. Honorary Co-Chairs are Adrienne Ives, Vincent Chew and Jeanine Wallace, and Co-chairs are Denise Fate, Lisa Mower Gandelot and Alvin Ranger. A case statement was written outlining our capital needs and funding goals. The committee recommended and the board approved establishment of an account at the Charlevoix County Community Foundation (C3F) to manage the campaign gifts. It was also decided to invest in professional marketing materials. Once these were off the press, the campaign was introduced with a reception for patrons at the Depot in June. A video was made highlighting the renovation work which needs to be done at the Museum at Harsha House and the Train Depot.

Through a variety of communications, mostly personal contacts by committee members, gifts totaling $230,083 were raised with another $36,600 in pledges. This includes a challenge grant announced in October for gifts received by year end up to $50,000, which was actually exceeded. The work of the committee and the support of donors is greatly appreciated.

Denise Fate, Co-Chair
Near Term Society Goals (2018-2020)

The goals were established as a result of workshops with the Board of Directors.

Membership:
- Increase number of members and the share of Ralph Hamilton members and patrons
- More extensive communications to promote membership, including social media
- Personal contacts to recruit members and show appreciation for existing ones

Public Relations/Marketing:
- Increase foot & online traffic to museum & store
- Consistent, impactful advertising, marketing and PR where appropriate
- Enhance retail operation, focus on unique merchandise
- Continue to increase utilization of social media (Facebook)
- Re-design newsletter to be sent quarterly
- Re-design & publish Society brochure
- Continued support of bus and walking tours

Programs and Events:
- Develop a calendar of versatile programs, with a cohesive theme
- Engage youth in our activities
- Further develop experiential events
- Plan creative and engaging fundraising events

Buildings and Grounds:
- **Depot**
  - Exterior renovations and painting
  - Make depot more accessible to visitors
  - Install awnings per historical records when funding available
- **Museum at Harsha House**
  - Complete exterior renovations - painting Spring 2018
  - Modify exhibit space to accommodate new major exhibit
  - Have preservation architect prepare master plan for building to provide for expanded exhibit and administrative workspace, as well as appropriate artifact storage
  - Develop projects based on the master plan and available capital funding for further renovations
- **Lighthouse**
  - Develop long-range maintenance program and secure funding

Museum Operations:
- As member of Cultural Corridor, attract more visitors and engage community in the museum
- Develop a museum strategy, in particular for exhibit space
- Mount major exhibit on ‘150 Years of Photography at the Historical Society’ in 2018
Near Term Society Goals (2018-2020)  (cont’d)

• Work with Main Street as advocates of historic preservation, in particular for the Charlevoix's historic buildings
• Complete project for digitization of photographic collection to organize, protect and preserve the collection
• Procure sufficient fireproof storage for photograph collection
• Review inventory of artifacts and ensure everything is properly cataloged
• Install necessary storage space, environment and location system for artifacts and archives
• Continue evolving as the leading center for historic research in Charlevoix

Financial:
• Further develop planned giving program
• Define major financial needs for each property
• Increase operating funds to meet expanding needs
• Continue outreach for capital campaign gifts

Staffing:
• Release HR handbook and other tools
• Cross-train new Curator in all functions of operation
Sponsors of the Charlevoix Historical Society, 2017

Patrons:

Platinum Level ($2000 - $2999)
Charlevoix State Bank, Freshwater Charch, Adrienne Osborne Ives, Craig & Deborah Mann, John S. Wilson

Gold Level ($1000 - $1999)
Mike & Rhea Dow, Burton & Susan Farberman, Paul & Sally Hoelderle, Robert & Melissa Kagle, Ole Lyngklip/Time Warner, Robert Pew, Villager Pub & Terry’s Place, Paul & Linda Weston

Silver Level ($500 - $999)
Ace Hardware, Jim & Patti Aikin, Belvedere Club, Virginia Cash, Charlevoix Commercial Center Self-Service Storage, Rob & Annie Cohen, John & Phyllis Elzinga, Denise & Gary Fate, Grey Gables Restaurant, Ralph & Mary Lynn Heid, Don & Kay Heise, Dale & Diane Herder, Tina Heugh, Don Kelly’s Furniture Barn, Tom & Sue Kirkpatrick, Dr. John W. & Carolyn MacKenzie, Nu-Core, Inc., Mr. & Mrs. Richard Platt, Steele & Mary Taylor, David & Judith Wilson

Bronze Level ($350 - $499)

Ralph Hamilton Circle Members, 2017
(Patron Sponsorship includes Circle Membership):

## Profit and Loss Statement

### Jan - Dec 17

#### Ordinary Income/Expense

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<th>Income</th>
<th>Amount</th>
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<td>Contributions</td>
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<td>Investment Income</td>
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<td>Membership Dues &amp; Assessments</td>
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<td>Other Types of Income</td>
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<td>Shop Sales</td>
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<td>Museum Admissions</td>
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<td>Depot Usage</td>
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<td>Special Events Income</td>
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**Total Income** 164,916.56

#### Cost of Goods Sold

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<td>Lighthouse</td>
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<td>Quantity and value Adjustment</td>
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**Total COGS** 10,293.53

#### Gross Profit

154,623.03

#### Expense

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<td>Membership expenses</td>
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<td>Depot Building</td>
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<td>Facilities and Equipment</td>
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<td>Lighthouse expenses</td>
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<td>Fundraiser &amp; Special Event Exp.</td>
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<td>Historical Society Payroll Acct</td>
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<td>Depreciation Expense</td>
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**Total Expense** 122,157.95

#### Net Ordinary Income

32,465.08

#### Net Income

32,465.08
# BALANCE SHEET

## Assets

### Current Assets
- Checking/Savings
  - Community Foundation Fund: 9,568.55
  - CVXStateBank Payroll Acct: 100.00
  - CVXStateBank LH: 19,347.05
  - CVXState checking: 47,103.35
  - Huntington Bank checking: 19,932.73
  - Pay Pal online: 1,050.19
  - Petty Cash: 100.00
- Total Checking/Savings: 97,201.87

### Accounts Receivable
- Account Receivable from Sales: 114.98
- Total Accounts Receivable: 114.98

### Other Current Assets
- Inventory Asset: 29,815.72
- Total Other Current Assets: 29,815.72

### Total Current Assets: 127,132.57

### Fixed Assets
- Depot Building: 260,730.31
- Harsha House: 204,916.23
- Furniture and Equipment: 54,461.93
- Land - Operating: 68,945.00
- Leasehold improvements: 59,685.64
- Accum Depr - Investment Assets: -401,821.42
- Total Fixed Assets: 246,917.69

### Other Assets
- Capital Fund CCCF: 82,820.52
- Total Other Assets: 82,820.52

### Total Assets: 456,870.78

## Liabilities & Equity

### Liabilities
- Current Liabilities
  - Accounts Payable: -322.03
  - Total Accounts Payable: -322.03
  - Total Current Liabilities: -322.03

### Total Liabilities: -322.03

### Equity
- Opening Bal Equity: 92,024.85
- Temp. Restricted Net Assets: 82,820.52
- Unrestricted Net Assets: 249,882.36
- Net Income: 32,465.08
- Total Equity: 457,192.81

### Total Liabilities & Equity: 456,870.78