



## Fort Atkinson Community Foundation 2013-14 Annual Report

### A gift today, a legacy tomorrow

Enclosed is my donation of \$ \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Fund/Note: \_\_\_\_\_  
\_\_\_\_\_

Send to:  
Fort Atkinson Community Foundation  
244 N. Main St.  
Fort Atkinson, WI 53538

Credit card donations can be made on our  
secure website, [www.fortfoundation.org](http://www.fortfoundation.org).

***"This kind of support from a community foundation is rare and wonderful. It's a big part of what makes Fort Atkinson a special place to call home."***

John Kleinschmidt, graduate student in Yale University's School of Architecture and current recipient of a Walter and Louise Buell Graduate Scholarship.



***Veterans Memorial in McCoy Park***

**Where gifts today  
build better tomorrows**

[www.fortfoundation.org](http://www.fortfoundation.org)

## Forever investing in our community and citizens

Dear Community,

The Board of Directors of the Fort Atkinson Community Foundation is pleased to present its June 30, 2014 fiscal year financial report.

It was a busy year at the Foundation as we received 790 separate donations totaling \$1,477,468. Most of these gifts were made to our pass-through funds with the goal of helping local non-profit groups such as Rock River Heritage, Friends of Haumerson's Pond, Project Lead, and Friends of McCoy Park bring their creative and exciting community projects to life.



***Cooler for the Fort Atkinson Food Pantry***

In addition to receiving gifts, we also made payments on grants and scholarships totaling \$1,094,913. These distributions were made in support of our mission to enhance the quality of life for Fort Atkinson residents. Of particular note among the many distributions was the final



***\$1.5 million for the Dwight Foster Public Library***



***Your 2014 Buell Merit Scholarship recipients with Foundation Vice-Chairman Phil Niemeyer.***

payment on our \$1.5 million commitment to the Dwight Foster Public Library for their 'Foster Growth' expansion project.

Our remarkable scholarship program continues to grow and this year we were pleased to fund 74 scholarships held by 62 undergraduate students, as well as 21 scholarships held by 16 graduate students – all from the Fort Atkinson area. The total amount paid to fund these 95 awards was a hefty \$219,883.

We were able to make these important investments in our community and in our young people thanks to the many forward-thinking families who continue to invest in the future of Fort Atkinson by giving to the Community Foundation. We remain grateful for your support.

Sincerely,

Beth McLaughlin, FAFD chairman

YOUR COMMUNITY FOUNDATION

The Fort Atkinson Community Foundation began in 1973 with a gift of \$25,000 from a local citizen who designated that the money be used to benefit a future Fort Atkinson community, whatever that community might look like and need. Inspired by this unique gift, community-minded citizens set up our foundation to be able to accept similar gifts to enhance the quality of life in Fort Atkinson.

Since that time, thanks to the generosity of the community it serves, the foundation has been able to distribute over \$16 million back to our community in fulfillment of its mission.

**The Community Foundation is a 501(c)3 organization. Your contribution is fully tax deductible.**



Equipment for the Middle School Archery Club

BOARD OF DIRECTORS

- Beth McLaughlin, chairman
- W. Phil Niemeyer, vice-chairman
- Dean Brown
- Christopher Rogers
- Mary Behling
- Ronald J. Vogel, past chairman

Annual Financial Report, Year Ending June 30, 2014

[figures rounded to nearest dollar]

Assets on July 1, 2013	\$21,562,709	
Assets on June 30, 2014		
General Fund	\$ 4,121,340	
Scholarship Funds:		
AAUW Second Chance	164,636	
Band Booster	7,890	
Batterman Family Fnd.	27,311	
Walter/Louise Buell	1,582,623	
Orrin/Margaret Bull	5,612	
Dahnert Memorial	30,493	
Fitzpatrick Educator	15,773	
Hake Agriculture	138,522	
Hake Engineering	112,399	
Halker Memorial	9,348	
Harrison Education	50,019	
Jones Dairy Tech Ed	56,340	
Robert/Judith Knapp	51,017	
Knox AAUW	208,508	
James/Frances Luther	41,177	
Mathews Education	47,381	
Pay It Forward	29,265	
Pharmacy	4,760	
Rose Dream	85,335	
Russell Athletic	104,402	
Ralph/Clara Rutledge	174,412	
Schreiner Memorial	338,593	
Maurice/Clara Staller	119,501	
Thrift Shop/Jean Reich	35,149	
Dr. Sydney Weidemann	110,077	
Wiederhoeft Legacy	60,649	3,611,194
Field of Interest Funds:		
Bark River Nature Park	70	
Beautification Fund	275,068	
Boys & Girls Club Inv.	25,619	
Dwight Foster Library	6,139	
Doris Highsmith	178,819	
Mary C. Hoard	10,748,858	
Bertha/Marilyn Kuhl	2,335,478	
Carol Liddle	62,866	
Lorine Niedercker	5,068	
Opportunities, Inc.	1,477	
Pope Memorial Art	69,391	
Senior Citizens Center	48,830	
Phyllis/Bob Zeimen	314,698	14,072,378

Donor-Advised Funds		
Elizabeth Jones Chisholm	10,011	
Gordon F. Day Family	23,620	
Kerschensteiner Family	411,226	
Negus Family	105,977	
Schafer Family	193,530	
Vance Family	33,768	778,132
Acorn Funds:		
Vincent Memorial	3,144	3,144
Pass-Through Project Funds		
Boys & Girls Club	26,899	
BGC—Rose Memorial	1,077	
Fire Department	126	
Friends of Haumerson’s Pond	164,370	
Friends of McCoy Park	14,218	
Performing Arts	242	
Project Lead	15,083	
Rock River Heritage	1,040,809	
Don Schink Memorial	2,794	
Theater Project	1,578	
Water Tower	1,241	1,268,436
Pass-Through Scholarship Funds		
Barrie Elementary School	3,550	
Eagle Scout/Gold Award	3,664	
Lloyd Hake Memorial	6,628	
Karrels Computer Science	22,017	
Luther Elementary School	2,483	
Jake Meinert Memorial	4,736	
Purdy Elementary School	10,214	
Rockwell Elementary School	2,502	55,795
Total Balance, June 30, 2014		\$23,910,419
Summary		
Balance at July 1, 2013		\$21,562,709
Plus:		
Interest and Dividends	508,818	
Gain on Investments	1,607,695	
Contributions Received	1,477,468	
		25,156,689
Minus:		
Expenses	151,357	
Charitable Disbursements	1,094,913	
Balance at June 30, 2014		\$23,910,419

SUPPORT A FUND OR OPEN YOUR OWN

Gifts can be made to the Foundation’s General Fund, which gives us the flexibility to respond to the changing needs of the community, or to any of the funds listed at left. Or open an endowed fund of your own.

FUND OPTIONS

**Acorn Fund**—Gradually build an endowment fund and, upon maturity, direct it toward your philanthropic interests.

**Donor-Advised Fund** — Recommend awards for local causes you would like to support.

**Field of Interest Fund** — Specify areas of interest, such as arts or recreation, leaving the Board to choose appropriate projects.

**Scholarship Fund**— Support educational opportunities for area students.



2014 Batterman Family Scholarship recipients

To learn more about our funds or ways of giving, please visit [www.fortfoundation.org](http://www.fortfoundation.org) or contact FACF program administrator Sue Hartwick at (920) 222-1191 or [facf@fortfoundation.org](mailto:facf@fortfoundation.org).





# Fort Atkinson Community Foundation

## “Where Gifts Today Build Better Tomorrows”

### Investing in our Community

Dear Community,

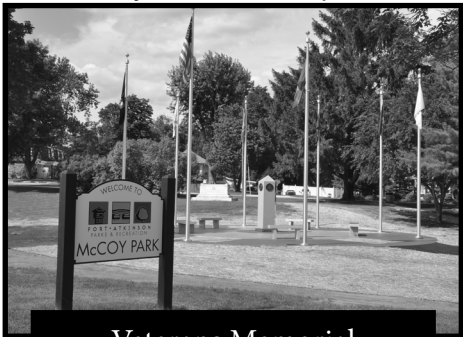
The Board of Directors of the Fort Atkinson Community Foundation is pleased to present its June 30, 2014 fiscal year financial report.

It was a busy year at the Foundation as we received 790 separate donations totaling \$1,477,468. Most of these gifts were made to our pass-through funds with the goal of helping local nonprofit groups such as Rock River Heritage, Friends of Haumerson's Pond, Project Lead, and Friends of McCoy Park bring their creative and exciting community projects to life.

In addition to receiving gifts, we also made payments on grants and scholarships totaling \$1,094,913, all in support of our mission to enhance the quality of life for Fort Atkinson residents. Of particular note among the many distributions was the final payment on our \$1.5 million commitment to the Dwight Foster Public Library for their 'Foster Growth' expansion project.

Our remarkable scholarship program continues to grow and this year we were pleased to make payments on 74 scholarships held by 62 undergraduate students, and another 21 scholarships held by 16 graduate students – all from the Fort Atkinson area. The total amount paid to fund these 95 scholarships was a hefty \$219,883.

We were able to make these investments in our community and in our



Veterans Memorial

young people thanks to the many forward-thinking families who continue to invest in the future of Fort Atkinson by giving to the Community Foundation. Working together, we make a difference.

To learn more about making a gift, setting up a fund, or applying for grants, please visit our website, [www.fortfoundation.org](http://www.fortfoundation.org) or call Program Administrator Sue Hartwick at (920) 222-1191 or email her at [facf@fortfoundation.org](mailto:facf@fortfoundation.org).

Sincerely,  
Beth McLaughlin, chairman



Archery Club Equipment

### Board of Directors

Beth McLaughlin      W. Phil Niemeyer      Dean Brown  
Christopher Rogers      Mary Behling

*“This kind of support from a community foundation is rare and wonderful. It’s a big part of what makes Fort Atkinson a special place to call home.”*

John Kleinschmidt, graduate student in Yale University's School of Architecture and current recipient of a Walter and Louise Buell Graduate Scholarship

### ANNUAL FINANCIAL REPORT

Year ending June 30, 2014

All figures rounded to the nearest dollar

Assets at Beginning of Year, July 1, 2013      21,562,709  
Assets as of June 30, 2014

General Fund:      \$4,121,340

Endowed Scholarship Funds:		
AAUW Second Chance	\$164,636	
Band Booster	\$7,890	
Batterman Family	\$27,311	
Walter and Louise Buell	\$1,582,623	
Orrin and Margaret Bull Family	\$5,612	
Jason Dahner Memorial	\$30,493	
Dr. James/Therese Fitzpatrick Educator	\$15,773	
Ben & Ada Hake Agriculture	\$138,522	
Jerome Hake Engineering	\$112,399	
Gene Halker Memorial	\$9,348	
Eileen Harrison Education	\$50,019	
Jones Dairy Farm Tech Ed	\$56,340	
Robert and Judith Knapp	\$51,017	
Knox A.A.U.W	\$208,508	
James and Frances Luther	\$41,177	
Isabelle Mathews Education	\$47,381	
Pay it Forward	\$29,265	
Pharmacy	\$4,760	
Rose Inspire-a-Dream	\$85,335	
Dr. James Russell Athletic	\$104,402	
Ralph and Clara Rutledge	\$174,412	
Juanita Schreiner Memorial	\$338,593	
Maurice and Clara Staller	\$119,501	
Thrift Shop/Jean Reich Memorial	\$35,149	
Dr. Sydney Weidemann	\$110,077	
Ardell Wiederhoeft Legacy	\$60,649	\$3,611,194

Donor-Advised Funds:		
Elizabeth Jones Chisholm Fund	\$10,011	
Gordon F. Day Family Fund	\$23,620	
Kerschensteiner Family Fund	\$411,226	
Negus Family Fund	\$105,977	
Schafer Family Fund	\$193,530	
Vance Family Fund	\$33,768	\$778,132

Field of Interest Funds:		
Bark River Nature Park	\$70	
Beautification Fund	\$275,068	
Boys and Girls Club Inv. Fund	\$25,619	
Dwight Foster Library Fund	\$6,139	
Doris Highsmith Social Services Fund	\$178,819	
Mary C. Hoard Fund	\$10,748,858	
Bertha and Marilyn Kuhl Fund	\$2,335,478	
Carol Liddle Fund	\$62,866	
Lorine Niedecker Fund	\$5,068	
Opportunities Inc.	\$1,477	
Pope Memorial Art Fund	\$69,391	
Senior Citizens Center Fund	\$48,830	
Phyllis and Bob Zeimen Fund	\$314,698	\$14,072,378

Acorn Funds:		
Robert Vincent Memorial Fund	\$3,144	\$3,144
Scholarship Pass-Through Funds:		
Barrie Elementary School	\$3,550	
Eagle Scout and Gold Award	\$3,664	
Lloyd Hake Memorial	\$6,628	
Ed Karrels Computer Science	\$22,017	
Luther Elementary School	\$2,483	
Jake Meinert Memorial	\$4,736	
Purdy Elementary School	\$10,214	
Rockwell Elementary School	\$2,502	\$55,795

Project Pass-Through Funds:		
Boys and Girls Club	\$26,899	
BGC - Rose Memorial Fund	\$1,077	
Fire Department Fund	\$126	
Friends of Haumerson's Pond	\$164,370	
Friends of McCoy Park	\$14,218	
Performing Arts Fund	\$242	
Project Lead	\$15,083	
Rock River Heritage Fund	\$1,040,809	
Schink Memorial Fund	\$2,794	
Theater Project Fund	\$1,578	
Water Tower Fund	\$1,241	\$1,268,436

Total Fund Balance, June 30, 2014      \$23,910,419

### Donations Received This Year:

General Fund			\$11,125
Endowed Scholarship Funds:			
AAUW Second Chance	\$2,000		
Batterman Family	\$60,000		
Orrin and Margaret Bull Family	\$500		
Dr. James/Therese Fitzpatrick Educator	\$3,055		
Ben and Ada Hake Agriculture	\$6,763		
Jerome Hake Engineering	\$7,013		
Robert and Judith Knapp	\$7,500		
Knox A.A.U.W	\$4,600		
Pay it Forward	\$3,450		
Rose Inspire-a-Dream	\$2,000		
Dr. James Russell Athletic	\$300		
Juanita Schreiner Memorial	\$200		
Thrift Shop/ Jean Reich Memorial	\$1,000		
Ardell Wiederhoeft Legacy	\$2,000	\$100,380	
Donor-Advised Funds:			
Gordon F. Day Family Fund	\$500		
Negus Family Fund	\$10,100	\$10,600	

The Community Foundation began in 1973 with a gift of \$25,000 from a local citizen who wanted the money to benefit a future Fort Atkinson community, whatever that community might look like and need. Inspired by this thoughtful gift, community-minded citizens set up the foundation to be able to accept gifts, like this initial one, intending to enhance the quality of life in Fort Atkinson. Since that time, thanks to the generosity of the community it serves, the foundation has been able to distribute over \$16 million in fulfillment of its mission.

Field Of Interest Funds:			
Bark River Nature Park	\$50		
Dwight Foster Library Fund	\$6,028		
Doris Highsmith Social Services Fund	\$1,330	\$7,408	
Acorn Funds:			
Robert Vincent Memorial Acorn Fund	\$3,075	\$3,075	
Scholarship Pass-Through Funds:			
Barrie Elementary School	\$1,000		
Eagle Scout and Gold Award	\$3,225		
Lloyd Hake Memorial	\$6,763		
Ed Karrels Computer Science	\$3,260		
Luther Elementary School	\$500		
Purdy Elementary School	\$2,807		
Rockwell Elementary School	\$500	\$18,054	
Project Pass-Through Funds:			
Boys and Girls Club	\$47,217		
Friends of Haumerson's Pond	\$151,885		
Friends of McCoy Park	\$16,252		
Library Building Fund	\$1		
Project Lead	\$15,118		
Rock River Heritage Fund	\$1,095,687		
Water Tower Fund	\$666	\$1,326,826	
Total Contributions Received This Year:		\$1,477,468	

### Charitable Disbursements:

General Fund				\$148,399
Endowed Scholarship Funds:				
AAUW Second Chance	\$3,000			
Batterman Family	\$57,000			
Walter and Louise Buell	\$75,377			
Jason Dahner Memorial	\$3,500			
Dr. James/Therese Fitzpatrick Educator	\$130			
Ben and Ada Hake Agriculture	\$5,000			
Jerome Hake Engineering	\$4,000			
Gene Halker Memorial	\$400			
Eileen Harrison Education	\$2,000			
Robert and Judith Knapp	\$2,500			
Knox A.A.U.W	\$11,100			
James and Frances Luther	\$1,700			
Isabelle Mathews Education	\$2,000			
Pay It Forward	\$500			
Purdy School Create-a-Dream	\$7			
Rose Inspire-a-Dream	\$3,000			
Dr. James Russell Athletic	\$3,938			
Ralph and Clara Rutledge Memorial	\$8,000			
Juanita Schreiner Memorial	\$16,975			
Maurice and Clara Staller	\$3,000			
Thrift Shop/Jean Reich Memorial	\$2,000			
Dr. Sydney Weidemann	\$5,000			
Ardell Wiederhoeft Legacy	\$1,300	\$211,426		
Donor-Advised Funds:				
Elizabeth Jones Chisholm Fund	\$25,000			
Kerschensteiner Family Fund	\$19,230			
Negus Family Fund	\$11,000			
Schafer Family Fund	\$20,000	\$75,230		
Field of Interest Funds:				
Bark River Nature Park Fund	\$3,518			
Beautification Fund	\$31,246			
Boys and Girls Club Inv. Fund	\$2,161			
Doris Highsmith Social Services Fund	\$2,000			
Mary C. Hoard Fund	\$338,424			
Pope Memorial Art Fund	\$1,075	\$378,424		
Scholarship Pass-Through Funds:				
Barrie Elementary School	\$500			
Eagle Scout and Gold Award	\$1,062			
Lloyd Hake Memorial	\$135			
Ed Karrels Computer Science	\$5,260			
Jake Meinert Memorial	\$500			
Purdy Elementary School	\$500			
Rockwell Elementary School	\$500	\$8,457		
Project Pass-Through Funds:				
Boys and Girls Club Fund	\$35,340			
Friends of Haumerson's Pond	\$65			
Friends of McCoy Park	\$2,638			
Library Building Fund	\$46,579			
Project Lead	\$44,499			
Rock River Heritage Fund	\$143,857	\$272,977		
Total Charitable Disbursements This Year:		\$1,094,913		

Summary: Balance at July 1, 2013		\$21,562,709
Interest and Dividends	\$508,818	
Gain on Investments	\$1,607,695	
Contributions Received	\$1,477,468	\$3,593,981
Balance Before Expenses/Disbursements		\$25,156,689
Less Expenses	\$151,357	
Less Charitable Disbursements	\$1,094,913	\$1,246,270
Balance at June 30, 2014		\$23,910,419

Donations to the Fort Atkinson Community Foundation - a 501(c)3 charitable organization - are tax-deductible.

Enclosed is my donation of \$\_\_\_\_\_ to help enhance the quality of life in Fort Atkinson.

Fund \_\_\_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_

MAIL TO: Fort Atkinson Community Foundation  
244 N. Main St.  
Fort Atkinson, WI 53538