



Fort Atkinson Community Foundation 2017-18 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.

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

OUR IMPACT

Thanks to the generosity of the community it serves, since the Foundation began in 1973, it has poured over \$20 million in grants back into the community, making Fort Atkinson a special place to live, work and play.



New police dog Bolt with Officer Boeve

Where gifts today build better tomorrows

www.fortfoundation.org

Alone a ripple; together a wave

Dear Community,

I am delighted to share our annual report with you!

Looking back at all the projects the Foundation supported this past year, I am reminded of the power of 'we.' Working together, we made a big difference for our community – by helping provide an ambulance, new trees, and a police dog for our



New sign for the high school

city; by supporting our kids through grants to the Boys and Girls Club, the Books on Bikes summer program, and to Fort HealthCare to fund behavioral health counseling sessions for some of our high school students; by facilitating unique projects such as the Warming House out at Haumerson's Pond and the Veterans Memorial in McCoy Park; and by giving local students a

chance to follow their dreams with our remarkable scholarship program.



Spanish language collection for the public library

To all those who have contributed to the Fort Atkinson Community Foundation this past year, please accept my sincere thanks for being part of this powerful 'we.'



Ambulance for the FA Fire Dept.

To all those who might want to join us, take a look at the different funds we hold and see if any of them have any special interest for you. Donations can be made to any fund, including our critically important General Fund, which gives directors the flexibility to respond to the changing needs of our community.

Thanks to everyone for helping us build better tomorrows!

Sincerely,

Mary J. Behling
FACF chairman

DESIGNATED FUNDS



Fort Atkinson Boys & Girls Club Fund supporting our afterschool program

Designated Funds held at the Community Foundation:

- | | |
|------------------------------|------------------------|
| Dwight Foster Library | K9 Veterans Memorial |
| Embraced: Jones Park | Lorine Niedecker |
| Fort Atk. Boys & Girls Club | Police Dept. DARE |
| Fort Atk. Historical Society | Police Dept. K9 Unit |
| Fort Tree Fund | Project Lead |
| Fort Wheels Park Fund | Senior Citizens Center |
| Friends of Haumerson's Pond | Schink Fund |
| Friends of McCoy Park | Water Tower |



Fort Tree Fund supporting a multi-year plan to plant hundreds of new trees for the City

SCHOLARSHIP FUNDS

\$275,656
paid in scholarships to 102 local students
 and
\$309,450
awarded in scholarships to 85 local students



2018 Batterman Family Scholarship recipients

Scholarship Funds held at the Community Foundation:

- | | |
|-----------------------------|------------------------|
| AAUW Second Chance | Make a Difference |
| Batterman Family | Mathews Education |
| Walter/Louise Buell | Medical Careers |
| Orrin/Margaret Bull | Jake Meinert Memorial |
| Hannah Church Memorial | Pay It Forward |
| Dahnert Memorial | Rose Inspire-a-Dream |
| Eagle Scout/Gold Award | Russell Athletic |
| Fireside Theatre | Ralph/Clara Rutledge |
| Fitzpatrick Educator | Schreiner Memorial |
| Hake Agriculture | Science Matters |
| Hake Engineering | Maurice/Clara Staller |
| Lloyd Hake Voc Tech | Kathleen Thorndike |
| Halker Memorial | Thrift Shop/Jean Reich |
| Harrison Education | Jim/Lee Vance |
| Jones Dairy Farm | David Veith Memorial |
| Karrels AP Computer Science | Dr. Sydney Weidemann |
| Robert/Judith Knapp | Wiederhoeft Legacy |
| Knox AAUW | Phyllis Zeimen Family |
| James/Frances Luther | |

FIELD OF INTEREST FUNDS



Books on Bikes project supported by our Doris Highsmith Social Services Fund

Field of Interest Funds held at the Community Foundation:

- | | |
|---------------------------|--------------------|
| Beautification Fund | Carol Liddle |
| Highsmith Social Services | Pope Memorial Art |
| Mary C. Hoard | Phyllis/Bob Zeimen |
| Bertha/Marilyn Kuhl | |

- Other Funds:**
- General Fund
 - 7 Donor-Advised Funds
 - 1 Acorn Fund

To learn more about all our funds and ways of giving, visit www.fortfoundation.org or contact Foundation administrator Sue Hartwick at (920) 563-3210 or via email at facf@fortfoundation.org.

FACF BOARD OF DIRECTORS

- Mary Behling, chairman
- Kristin Wallace, vice-chairman
- Scott Housley, treasurer
- Michael Bender, secretary
- Loren Gray, director
- Chris Rogers, past chairman

MISSION

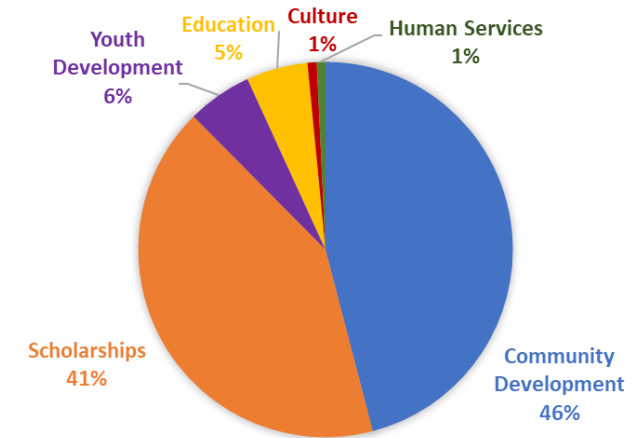
The mission of the Community Foundation is to receive donations for educational, charitable, cultural or benevolent purposes and use them to benefit our residents and enhance the quality of life in the Fort Atkinson area.

YEAR ENDING JUNE 30, 2018

[figures rounded to nearest dollar]

| | |
|---------------------------------|---------------------|
| Balance at July 1, 2017 | \$25,101,506 |
| Plus: | |
| Interest and Dividends | 531,683 |
| Investment Gain/Loss | 711,409 |
| Contributions Received | 557,990 |
| | \$26,902,588 |
| Minus | |
| Administrative Expenses | 103,838 |
| Investment Management | 146,709 |
| Charitable Disbursements | 662,568 |
| Balance at June 30, 2018 | \$25,989,473 |

2017-18 CHARITABLE DISBURSEMENTS





Fort Atkinson Community Foundation

"Where Gifts Today Build Better Tomorrows"

Alone a ripple; together a wave

Dear Community,

I am delighted to share our annual report with you!

Looking back at all the projects the Foundation supported this past year, I am reminded of the power of 'we.' Working together, we made a big difference for our community – by helping provide an ambulance, new trees, and a police dog for our city; by supporting our kids through grants to the Boys and Girls Club, the Books on Bikes summer program, and to Fort HealthCare to fund behavioral health counseling sessions for some of our high school students; by facilitating unique projects such as the Haumerson's Pond Warming House and the K9 Veterans Memorial; and by giving local students a chance to follow their dreams with our remarkable scholarship program.



Books on Bikes



New Trees for our City

Looking back at all the projects the Foundation supported this past year, I am reminded of the power of 'we.' Working together, we made a big difference for our community – by helping provide an ambulance, new trees, and a police dog for our city; by supporting our kids through grants to the Boys and Girls Club, the Books on Bikes summer program, and to Fort HealthCare to fund behavioral health counseling sessions for some of our high school students; by facilitating unique projects such as the Haumerson's Pond Warming House and the K9 Veterans Memorial; and by giving local students a chance to follow their dreams with our remarkable scholarship program.

To all those who have contributed to the Fort Atkinson Community Foundation this past year, please accept my sincere thanks for being part of this powerful 'we.'

To all those who might want to join us, please take a look at the different funds we hold and see if any of them have any special interest for you.

Donations can be made to any fund, including our critically important General Fund, which gives directors the flexibility to respond to the changing needs of our community.

To learn more about making a gift, setting up a fund, or applying for grants, please visit our website, www.fortfoundation.org or contact the Foundation's administrator, Sue Hartwick, at (920) 563-3210 or via email at facf@fortfoundation.org.

We hope you can join us!

Sincerely,
Mary J. Behling, FACF chairman

Board of Directors

Mary Behling, Kristin Wallace,
Scott Housley, Michael Bender,
Loren Gray



2018 Batterman Scholarship recipients



New police dog Bolt

"Without your support, we literally would not be able to put the wheels in motion."

-Sarah Horwath, Rockwell School librarian and coordinator of Books on Bikes - an innovative project to keep books and students connected during the summer months.

ANNUAL FINANCIAL REPORT

Year ending June 30, 2018

| | | |
|---|--------------|---------------------|
| Assets at Beginning of Year, July 1, 2017 | | \$25,101,506 |
| Assets as of June 30, 2018 | | |
| General Fund: | \$4,566,700 | \$4,566,700 |
| Acorn Funds: | | |
| Robert Vincent Memorial Fund | \$14,748 | \$14,748 |
| Designated Funds: | | |
| FA Boys and Girls Club Fund | \$258,252 | |
| Dwight Foster Library Fund | \$39,685 | |
| Fort Atkinson Historical Society | \$16,229 | |
| Lorine Niedecker Fund | \$4,359 | |
| Police Dept. K9 Unit Fund | \$13,748 | |
| Senior Citizens Center Fund | \$41,933 | \$374,206 |
| Donor-Advised Funds: | | |
| Elizabeth Jones Chisholm Fund | \$16,122 | |
| Gordon F. Day Family Fund | \$12,981 | |
| Kerschensteiner Family Fund | \$466,897 | |
| Negus Family Fund | \$137,907 | |
| Schafer Family Fund | \$223,637 | |
| Vance Family Fund | \$76,758 | |
| Ward Knox Family Fund | \$105,394 | \$1,039,695 |
| Field of Interest Funds: | | |
| Beautification Fund | \$284,477 | |
| Doris Highsmith Social Services Fund | \$199,819 | |
| Mary C. Hoard Fund | \$12,029,707 | |
| Bertha and Marilyn Kuhl Fund | \$2,200,117 | |
| Carol Liddle Fund | \$71,011 | |
| Pope Memorial Art Fund | \$175,882 | |
| Phyllis and Bob Zeimen Fund | \$76,019 | \$15,037,031 |
| Scholarship Funds: | | |
| AAUW Second Chance | \$279,679 | |
| Batterman Family | \$42,038 | |
| Walter and Louise Buell | \$1,535,791 | |
| Orrin and Margaret Bull Family | \$13,111 | |
| Hannah Church Memorial | \$15,931 | |
| Jason Dahnert Memorial | \$23,213 | |
| Fireside Theatre | \$19,472 | |
| Dr. James/Therese Fitzpatrick Educator | \$24,360 | |
| Ben & Ada Hake Agriculture | \$193,126 | |
| Jerome Hake Engineering | \$155,831 | |
| Gene Halker Memorial | \$8,349 | |
| Eileen Harrison Education | \$48,560 | |
| Jones Dairy Farm | \$57,976 | |
| Robert and Judith Knapp | \$103,414 | |
| Jane Knox A.A.U.W. | \$210,196 | |
| James and Frances Luther | \$104,675 | |
| Make a Difference | \$85,366 | |
| Isabelle Matthews Education | \$49,672 | |
| Medical Careers Scholarship | \$209,024 | |
| Pay it Forward | \$37,594 | |
| Rose Inspire-a-Dream | \$96,590 | |
| Dr. James Russell Athletic | \$104,452 | |
| Ralph and Clara Rutledge | \$169,526 | |
| Juanita Schreiner Memorial | \$336,952 | |
| Science Matters | \$28,337 | |
| Maurice and Clara Staller | \$118,837 | |
| Kathleen Grabil Thorndike | \$57,071 | |
| Thrift Shop/Jean Reich Memorial | \$33,434 | |
| Jim and Lee Vance | \$234,723 | |
| Dr. Sydney Weidemann | \$95,869 | |
| Ardell Wiederhoeft Legacy | \$62,195 | |
| Phyllis Zeimen Family | \$106,463 | \$4,661,824 |
| Non-Endowed Designated Funds: | | |
| Embraced: Jones Park | \$2,521 | |
| Fort Tree Fund | \$9,935 | |
| Fort Wheels Park Fund | \$29,480 | |
| Friends of Haumerson's Pond | \$34,079 | |
| Friends of McCoy Park | \$16,965 | |
| K9 Veterans Memorial | \$57 | |
| Police Department DARE Fund | \$11,436 | |
| Project Lead | \$37,397 | |
| Schink Memorial Fund | \$2,808 | |
| Water Tower Fund | \$7,416 | \$152,095 |
| Non-Endowed Scholarship Funds: | | |
| Barrie Elementary School | \$7,561 | |
| Eagle Scout and Gold Award | \$5,704 | |
| Lloyd Hake Memorial | \$53,252 | |
| Ed Karrels AP Computer Science | \$55,229 | |
| Luther Elementary School | \$2,010 | |
| Jake Meinert Memorial | \$4,137 | |
| Purdy Elementary School | \$10,267 | |
| Rockwell Elementary School | \$2,013 | |
| Veith Memorial | \$3,000 | \$143,174 |
| Total Fund Balance, June 30, 2018 | | \$25,989,473 |
| Contributions Received This Year: | | |
| General Fund | | \$68,919 |
| Acorn Funds: | | |
| Robert Vincent Memorial Acorn Fund | \$5,100 | \$5,100 |
| Designated Funds: | | |
| FA Boys & Girls Club Fund | \$67,743 | |
| Dwight Foster Library | \$4,225 | |
| Fort Atkinson Historical Society | \$3,155 | |
| Lorine Niedecker | \$1,100 | |
| Police Dept. K9 Fund | \$1,505 | |
| Senior Citizens Center Fund | \$60 | \$77,788 |
| Donor-Advised Funds: | | |
| Day Family Fund | \$300 | |
| Negus Family Fund | \$10,487 | |
| Schafer Family Fund | \$10,000 | \$20,787 |
| Scholarship Funds: | | |
| AAUW Second Chance | \$100 | |
| Batterman Family | \$57,000 | |
| Orrin and Margaret Bull | \$4,500 | |
| Hannah Church Memorial | \$5,125 | |

| | | |
|--|-----------|---------------------|
| Fireside Theatre | \$20,000 | |
| Dr. James/Therese Fitzpatrick Educator | \$1,000 | |
| Ben and Ada Hake Agriculture | \$15,395 | |
| Jerome Hake Engineering | \$15,395 | |
| Robert and Judith Knapp | \$30,500 | |
| Jane Knox A.A.U.W | \$3,300 | |
| Make a Difference | \$1,180 | |
| Pay it Forward | \$1,150 | |
| Rose Inspire-a-Dream | \$1,125 | |
| Dr. James Russell Athletic | \$24 | |
| Science Matters | \$16,943 | |
| Juanita Schreiner Memorial | \$150 | |
| Kathleen Grabil Thorndike | \$57,799 | \$230,686 |
| Non-Endowed Designated Funds: | | |
| Fort Tree Fund | \$6,165 | |
| Fort Wheels Park | \$29,585 | |
| Friends of Haumerson's Pond | \$18,499 | |
| Friends of McCoy Park | \$550 | |
| K9 Veterans Memorial | \$50 | |
| Police Department DARE Fund | \$11,969 | |
| Project Lead | \$37,621 | |
| Water Tower Fund | \$333 | \$104,772 |
| Non-Endowed Scholarship Funds: | | |
| Barrie Elementary School | \$1,000 | |
| Eagle Scout and Gold Award | \$500 | |
| Lloyd Hake Memorial | \$15,395 | |
| Ed Karrels AP Computer Science | \$29,592 | |
| Jake Meinert | \$396 | |
| David Veith Memorial | \$3,055 | \$49,938 |
| Total Contributions Received This Year: | | \$557,990 |
| Charitable Disbursements: | | |
| General Fund | | \$97,250 |
| Designated Funds: | | |
| FA Boys & Girls Club Fund | \$28,000 | |
| Fort Atkinson Historical Society Fund | \$692 | |
| Police Dept. K9 Unit Fund | \$13,000 | \$41,692 |
| Donor-Advised Funds: | | |
| Negus Family Fund | \$8,000 | |
| Vance Family Fund | \$4,000 | |
| Ward Knox Family Fund | \$5,000 | \$17,000 |
| Field of Interest Funds: | | |
| Beautification Fund | \$837 | |
| Doris Highsmith Social Services | \$2,000 | |
| Mary C. Hoard Fund | \$11,636 | |
| Bertha & Marilyn Kuhl | \$30,000 | |
| Pope Memorial Art Fund | \$1,150 | \$45,623 |
| Scholarship Funds: | | |
| AAUW Second Chance | \$6,650 | |
| Batterman Family | \$54,000 | |
| Walter and Louise Buell | \$58,500 | |
| Orrin and Margaret Bull | \$500 | |
| Hannah Church Memorial | \$1,000 | |
| Jason Dahnert Memorial | \$3,500 | |
| Fitzpatrick Educator | \$1,000 | |
| Ben and Ada Hake Agriculture | \$8,500 | |
| Jerome Hake Engineering | \$19,500 | |
| Gene Halker Memorial | \$1,000 | |
| Eileen Harrison Education | \$2,000 | |
| Jones Dairy Farm | \$3,750 | |
| Robert and Judith Knapp | \$2,500 | |
| Knox A.A.U.W | \$10,200 | |
| James and Frances Luther | \$5,300 | |
| Make a Difference | \$5,000 | |
| Medical Careers | \$7,000 | |
| Pay It Forward | \$1,200 | |
| Rose Inspire-a-Dream | \$2,000 | |
| Dr. James Russell Athletic | \$4,000 | |
| Ralph and Clara Rutledge Memorial | \$6,500 | |
| Juanita Schreiner Memorial | \$12,731 | |
| Maurice and Clara Staller | \$4,275 | |
| Thrift Shop/Jean Reich Memorial | \$2,000 | |
| Jim and Lee Vance | \$11,500 | |
| Dr. Sydney Weidemann | \$3,000 | |
| Ardell Wiederhoeft Legacy | \$1,800 | |
| Phyllis Zeimen Family | \$4,000 | \$242,906 |
| Non-Endowed Designated Funds: | | |
| Fort Tree Fund | \$11,636 | |
| Friends of Haumerson's Pond | \$123,422 | |
| Friends of McCoy Park | \$1,277 | |
| K9 Veterans Memorial | \$46,118 | |
| Project Lead | \$2,895 | \$185,347 |
| Non-Endowed Scholarship Funds: | | |
| Barrie School | \$500 | |
| Eagle Scout and Gold Award | \$1,250 | |
| Ed Karrels AP Computer Science | \$15,000 | |
| Fort Half Marathon | \$6,000 | |
| Lloyd Hake Memorial | \$8,500 | |
| Luther School | \$500 | |
| Purdy School | \$500 | |
| Rockwell School | \$500 | \$32,750 |
| Total Charitable Disbursements This Year: | | \$662,568 |
| Summary: Balance at July 1, 2017 | | \$25,101,506 |
| Interest and Dividends | \$531,683 | |
| Gain on Investments | \$711,409 | |
| Contributions Received | \$557,990 | \$1,801,082 |
| Balance Before Expenses/Disbursements | | \$26,902,588 |
| Administrative Expenses | \$103,838 | |
| Investment Management | \$146,709 | |
| Charitable Disbursements | \$662,568 | \$913,115 |
| Balance at June 30, 2018 | | \$25,989,473 |

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

The mission of the Fort Atkinson Community Foundation is to receive donations for educational, cultural, charitable, or benevolent purposes and use them to benefit our residents and enhance the quality of life in the Fort Atkinson area. Since the Foundation began in 1973, it has poured over \$20 million in grants back into the community, making Fort Atkinson a special place to live, work and play.