



Fort Atkinson Community Foundation 2019-20 Annual Report

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.

"You have changed the trajectory of both my financial and personal futures in ways that I never would have imagined as a Fort Atkinson high school student. The people of Fort Atkinson are truly amazing."

Kevin England, 2017 Fort grad,
and recipient of Buell Merit and
Hake Agricultural scholarships



Wheels Park

**Where gifts today
build better tomorrows**

www.fortfoundation.org

Responding to our Community

Dear Community,

What a year 2020 has been!

The past few months have brought unprecedented challenges. Thankfully, our community foundation is uniquely positioned to address such a crisis. In March, we quickly launched a Covid-19 Relief Fund in support of our local nonprofit community, priming the pump by promising to match all donations. Thanks to a great response, this July we were able to distribute \$120,000 to local nonprofit organizations that had to spend money in an extraordinary fashion in support of our community or suffered substantial revenue loss during this challenging time.



Jones Park sign

While all this was going on, we also carried out our normal philanthropic operations. Thanks to the steady generosity of our donors, during the 2019-20 fiscal year we were able to grant almost \$500,000 in support of projects that improved our community. In addition, we also distributed well over \$300,000 in scholarships, helping our young people make the most of their hard-earned educational opportunities.



Sensory Garden At Luther Elementary School

We were able to make these investments in our community and in our young people thanks to the many kind-hearted donors who continue to actively invest in the future of Fort Atkinson by establishing charitable funds and donating to the Community Foundation. Working together, we make a difference.

Sincerely,
Scott Housley
FACF chairman



Historic Fort Atkinson Mural

OUR VISION

A Better Fort Atkinson

OUR MISSION

Improving the quality of life in Fort Atkinson by inspiring and supporting enduring philanthropy

OUR VALUES

We celebrate the generosity of our community. We value being a nimble, responsive organization that helps kind-hearted donors support their passions. We believe in engagement, improvement, integrity, equal opportunity, collaboration, and lifelong learning.

YEAR ENDING JUNE 30, 2020

[figures rounded to nearest dollar]

Balance at July 1, 2019 **\$28,214,851**

Plus:

Interest and Dividends	633,699
Investment Gain/Loss	244,432
Contributions Received	326,559
	\$29,419,541

Minus:

Administrative Expenses	133,249
Investment Management	157,288
Charitable Disbursements	807,426

Balance at June 30, 2020 **\$28,321,578**



Project Lead's Shade Sails at the Aquatic Center

Designated Funds



Our Designated Funds support specific nonprofit organizations or projects. Donations to the Police Department's K9 Unit Fund allowed the police department to purchase this specially outfitted K9 squad car for our police dog Bolt and his handler.

Designated Funds held at the Community Foundation:

BASE Club Fund	Fort Wheels Park Fund
Classroom Teacher Wish	Friends of Haumerson's Pond
Covid-19 Relief Fund	Friends of McCoy Park
Dwight Foster Library	Lorine Niedecker
Embraced: Jones Park	Police Dept. DARE
Fort Atkinson Club	Police Dept. K9 Unit
Fort Atk. Food Pantry	Project Lead
Fort Atk. Historical Society	Senior Citizens Center
Fort Tree Fund	Water Tower

To learn more, visit www.fortfoundation.org or contact Sue Hartwick, FAF's executive director, at (920) 563-3210 or facf@fortfoundation.org.

FACF BOARD OF DIRECTORS

Scott Housley, chairman
 Michael Bender, vice-chairman
 Loren Gray, treasurer
 Sue Johnson, secretary
 Sally Koehler, director
 Kristin Wallace, past chairman

Scholarship Funds

\$326,375

paid in scholarships to 104 local students
and

\$382,100

awarded in scholarships to 85 local students



Karrels AP Computer Science Scholarship Recipients

Scholarship Funds held at the Community Foundation:

AAUW Grants for Gals	James/Frances Luther
AAUW Second Chance	Make a Difference
Batterman Family	V.C./Blanche Martin
Richard Noel Bingham	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
Victor/Ruth Johnson	David Veith Memorial
Jones Dairy Farm	Dr. Sydney Weidemann
Karrels AP Computer Science	Wiederhoeft Legacy
Robert/Judith Knapp	Phyllis Zeimen Family
Knox AAUW	

Field of Interest Funds



The arts, recreation, historic preservation . . . or all of the above? Our Field of Interest Funds are endowed, permanent funds that provide support for projects that address areas of interest the fund creator identified as important to them. Our Bertha & Marilyn Kuhl Fund has been responsible for dozens of projects around town, most recently funding playground equipment (pictured above) for Arrowhead Park.

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	

General Fund

Our versatile General Fund supports both the Foundation's day-to-day operations as well as many of our grants, like those for the cardiac monitor for the Fire Department's new ambulance or the van for the School District's 18-to-21 program. The General Fund



is our engine, our critical workhorse that allows us to respond to the changing needs of the community. We are grateful to those donors who support it.



Fort Atkinson Community Foundation

Where Gifts Today Build Better Tomorrows

Responding to our Community

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Squad car for the K9 Unit

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Karrels AP Computer Science Scholarship recipients

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actively invest in the future of Fort Atkinson by establishing charitable funds and donating 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 or contact the Foundation's executive director, Sue Hartwick, at (920) 563-3210 or via email at facf@fortfoundation.org.

Sincerely,
Scott Housley, FAF Chairman



Sensory Garden at Luther School

Board of Directors

Scott Housley
Michael Bender
Loren Gray
Sue Johnson
Sally Koehler



Fort Wheels Park

Fort Atkinson Community Foundation

Vision: A Better Fort Atkinson

Mission: Improving the quality of life in Fort Atkinson by inspiring and supporting enduring philanthropy.

Values: We celebrate the generosity of our community. We value being a nimble, responsive organization that helps kind-hearted donors support their passions. We believe in engagement, improvement, integrity, collaboration, lifelong learning, and equal opportunity.

ANNUAL FINANCIAL REPORT

Year ending June 30, 2020

Assets at Beginning of Year, July 1, 2019		\$28,214,851
Assets as of June 30, 2020		
General Fund	\$4,793,634	\$4,793,634
Designated Funds:		
BASE Fund	\$221,796	
Classroom Teacher Wish Fund	\$109,263	
Dwight Foster Library Fund	\$41,534	
Fort Atkinson Club Fund	\$23,521	
Fort Atkinson Food Pantry Fund	\$16,985	
Fort Atkinson Historical Society	\$16,324	
Lorine Niedecker Fund	\$4,710	
Police Dept. K9 Unit Fund	\$18,262	
Senior Citizens Center Fund	\$46,239	\$498,634
Donor-Advised Funds:		
Elizabeth Jones Chisholm Fund	\$24,143	
Gordon F. Day Family Fund	\$13,958	
Kerschensteiner Family Fund	\$476,900	
Negus Family Fund	\$259,922	
Schafer Family Fund	\$222,975	
Vance Family Fund	\$44,833	
Robert James Vincent 'Mr. V' Fund	\$15,608	
Ward Knox Family Fund	\$111,153	\$1,169,492
Field of Interest Funds:		
Beautification Fund	\$279,149	
Bertha & Marilyn Kuhl Fund	\$2,352,230	
Carol Liddle Fund	\$74,891	
Doris Highsmith Social Services	\$202,036	
Mary C. Hoard Fund	\$12,601,810	
Phyllis & Bob Zeimen Fund	\$185,493	
Pope Memorial Art Fund	\$77,790	\$15,773,399
Scholarship Funds:		
AAUW Grants for Gals Fund	\$19,597	
AAUW Second Chance	\$272,534	
Ardell Wiederhoeft Legacy	\$60,537	
Ben and Ada Hake Agriculture	\$190,805	
Dr. James/Therese Fitzpatrick Educator	\$22,569	
Dr. James Russell Athletic	\$103,498	
Dr. Sydney H. Weidemann	\$88,260	
Eileen Harrison Education	\$46,725	
Fireside Theatre	\$19,357	
FA Thrift Shop/Jean Reich	\$33,200	
Fred/Helen Rose Inspire-a-Dream	\$106,355	
Gene Halker Memorial	\$6,697	
Hannah Church Memorial	\$14,884	
Isabelle Mathews Education	\$47,914	
James and Frances Luther	\$101,408	
Jane Knox AAUW Scholarship	\$202,478	
Jason Dahmert Memorial	\$20,927	
Jerome Hake Engineering	\$138,919	
Jones Dairy Farm	\$59,491	
Juanita Schreiner Memorial	\$328,934	
Kathleen Grabill Thorndike	\$56,690	
Lloyd Hake Endowed	\$29,811	
Make A Difference Scholarship	\$80,700	
Maurice and Clara Staller	\$118,461	
Medical Careers Scholarship	\$206,372	
Orrin and Margaret Bull Family	\$39,957	
Pay It Forward Scholarship	\$38,845	
Phyllis Zeimen Scholarship	\$103,232	
Ralph/Clara Rutledge Memorial	\$163,049	
Richard Noel Bingham Memorial	\$1,133,842	
Robert and Judith Knapp	\$112,171	
Science Matters Scholarship	\$64,950	
Theodore W. Batterman Family	\$48,902	
Jim and Lee Vance Scholarship	\$224,788	
V.C./Blanch Helgren Martin	\$30,231	
Victor and Ruth Johnson Scholarship	\$17,204	
Walter and Louise Buell	\$1,489,296	\$5,843,594
Non-Endowed Project Funds:		
Covid-19 Relief Fund	\$59,779	
Embraced: Jones Park	\$2,580	
Fort Tree Fund	\$8,156	
Fort Wheels Park Fund	\$1,287	
Friends of Haumerson's Pond	\$33,354	
Friends of McCoy Park	\$5,361	
Police Department DARE Fund	\$10,080	
Project Lead Fund	\$15,671	
Water Tower Fund	\$8,632	\$144,900
Non-Endowed Scholarship Funds:		
Barrie School Scholarship	\$6,851	
Eagle Scout & Gold Award	\$6,567	
Ed Karrels AP Computer Science	\$43,341	
Jake Meinert Memorial	\$3,537	
Lloyd Hake Scholarship	\$20,012	
Luther School Scholarship	\$3,581	
Purdy School Scholarship	\$8,987	
Rockwell School Scholarship	\$2,586	
David Veith Memorial Scholarship	\$2,463	\$97,925
Total Fund Balance, June 30, 2020		\$28,321,578
Contributions Received This Year:		
General Fund		\$10,935
Acorn Funds:		
Fort Atkinson Club Community	\$11,850	\$11,850
Designated Funds:		
BASE Club Fund	\$17,310	
Classroom Teacher Wish Fund	\$7,800	
Dwight Foster Library Fund	\$10,500	
Fort Atkinson Club Fund	\$5,000	
Fort Atkinson Food Pantry Fund	\$600	
Police Dept. K9 Unit Fund	\$12,300	
Senior Citizens Center Fund	\$2,000	\$55,510
Donor-Advised Funds:		
Elizabeth Jones Chisholm Fund	\$2,500	
Negus Family Fund	\$10,509	\$13,009
Scholarship Funds:		
AAUW Grants for Gals	\$2,475	
AAUW Second Chance	\$200	
Dr. James/Therese Fitzpatrick Educator	\$1,000	
Dr. James Russell Athletic	\$285	
Dr. Sydney Weidemann	\$30	
FA Thrift Shop/Jean Reich Memorial	\$600	

Fred/Helen Rose Inspire-a-Dream	\$2,000	
Jane Knox AAUW Scholarship	\$3,100	
Make A Difference Scholarship	\$870	
Orrin and Margaret Bull Family	\$20,995	
Pay It Forward Scholarship	\$1,200	
Robert and Judith Knapp	\$3,000	
Science Matters Scholarship	\$13,000	
Theodore W. Batterman Family	\$54,000	
V.C. and Blanche Martin	\$30,000	\$132,755
Non Endowed Designated Funds:		
Covid-19 Relief Fund	\$59,782	
Fort Tree Fund	\$4,619	
Fort Wheels Park Fund	\$6,678	
Friends of Haumerson's Pond	\$6,385	
Police Department DARE Fund	\$2,640	
Project Lead Fund	\$15,325	
Water Tower Fund	\$283	\$95,712
Non Endowed Scholarship Funds:		
Eagle Scout & Gold Award	\$500	
Ed Karrels AP Computer Science	\$3,062	
Jake Meinert Memorial	\$200	
Rockwell School Scholarship	\$500	
David Veith Memorial Scholarship	\$2,526	\$6,788
Total Contributions Received This Year		\$326,559
Charitable Disbursements This Year:		
General Fund		\$34,770
Designated Funds:		
BASE Club Fund	\$20,000	
Classroom Teacher Wish Fund	\$3,758	
Dwight Foster Public Library	\$21,973	
Fort Atkinson Historical Society Fund	\$708	
Police Department K9 Unit Fund	\$23,730	\$70,168
Donor-Advised Funds:		
Kerschensteiner Family Fund	\$7,000	
Negus Family Fund	\$1,000	
Vance Family Fund	\$10,000	\$18,000
Field of Interest Funds:		
Beautification Fund	\$17,900	
Bertha & Marilyn Kuhl Fund	\$49,776	
Doris Highsmith Social Services	\$4,066	
Mary C. Hoard Fund	\$62,761	
Pope Memorial Art Fund	\$1,150	\$135,653
Scholarship Funds:		
AAUW Grants for Gals	\$500	
AAUW Second Chance	\$11,000	
Ardell Wiederhoeft Legacy	\$2,500	
Ben and Ada Hake Agriculture	\$20,000	
Dr. James/Therese Fitzpatrick Educator	\$3,000	
Dr. James Russell Athletic	\$3,000	
Dr. Sydney H. Weidemann	\$6,000	
Eileen Harrison Education	\$2,000	
Fireside Theatre	\$1,000	
FA Thrift Shop/Jean Reich Memorial	\$2,000	
Fred/Helen Rose Inspire-a-Dream	\$2,000	
Gene Halker Memorial	\$1,000	
Hannah Church Memorial	\$750	
Isabelle Mathews Education	\$2,000	
James and Frances Luther	\$4,000	
Jane Knox AAUW Scholarship	\$10,500	
Jason Dahmert Memorial	\$3,500	
Jerome Hake Engineering	\$18,000	
Juanita Schreiner Memorial	\$11,750	
Kathleen Grabill Thorndike	\$2,000	
Make A Difference Scholarship	\$5,000	
Maurice and Clara Staller	\$3,025	
Medical Careers Scholarship	\$5,000	
Pay It Forward Scholarship	\$2,500	
Phyllis Zeimen Scholarship	\$4,000	
Ralph/Clara Rutledge Memorial	\$7,000	
Richard Noel Bingham Memorial	\$26,650	
Robert and Judith Knapp	\$4,000	
Science Matters Scholarship	\$1,200	
Theodore W. Batterman Family	\$54,000	
Jim and Lee Vance Scholarship	\$19,000	
Victor and Ruth Johnson Scholarship	\$750	
Walter and Louise Buell	\$61,500	\$300,125
Non Endowed Designated Funds:		
Fort Tree Fund	\$6,405	
Fort Wheels Park Fund	\$158,197	
Friends of Haumerson's Pond	\$21,970	
Friends of McCoy Park	\$11,868	
Police Department DARE Fund	\$3,362	
Project Lead Fund	\$20,657	\$222,460
Non Endowed Scholarship Funds:		
Barrie School Scholarship	\$1,000	
Eagle Scout & Gold Award	\$250	
Ed Karrels AP Computer Science	\$11,500	
Jake Meinert Memorial	\$1,000	
Lloyd Hake Scholarship	\$9,000	
Purdy School Scholarship	\$1,000	
David Veith Memorial Scholarship	\$2,500	\$26,250
Total Charitable Disbursements This Year		\$807,426
Summary: Balance at July 1, 2019		\$28,214,851
Interest and Dividends	\$633,699	
Gain on Investments	\$244,432	
Contributions Received	\$326,559	\$1,204,690
Balance Before Expenses/Disbursements		\$29,419,541
Administrative Expenses	\$133,249	
Investment Management	\$157,288	
Charitable Disbursements	\$807,426	\$1,097,963
Balance at June 30, 2020		\$28,321,578

"You have changed the trajectory of both my financial and personal futures in ways that I never would have imagined as a Fort Atkinson high school student. The people of Fort Atkinson are truly amazing."

Kevin England, 2017 Fort grad, and recipient of Buell Merit and Hake Agricultural scholarships