



# Fort Atkinson Community Foundation 2016-17 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).



*Warming House at Haumerson's Pond*

## Where gifts today build better tomorrows

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

*"I feel blessed to have grown up in Fort Atkinson where the community is so supportive of our education and invests in our future."*

Leah (Dahl) O'Connell, 2010 Fort grad and 2017 recipient of Schreiner Memorial and Buell Graduate scholarships.

## Making a Difference in Our Community

Dear Community,

The Board of Directors of the Fort Atkinson Community Foundation is pleased to present its June 30, 2017 fiscal year financial report.

Thanks to the generosity of so many who care about Fort Atkinson, we were able to grant almost \$250,000 in support of projects improving the fabric of our community. Perhaps nothing illustrates the range of the Foundation's impact better than two of the grants we made this year—one for early literacy computers at the public library to help our youngest of learners, and one to help install a hearing loop system in the Senior Center to help our eldest citizens reap the full benefit of activities there.



*Early literacy computers for public library*

The Foundation also worked to improve our community one student at a time with our amazing scholarship program. This year we distributed over \$250,000 in scholarships helping our young adults make the most of their educational opportunities.

We were able to make these investments in the community and in our young people thanks to the many forward-thinking people who continue to invest in the



*Hundreds of new trees to replace those damaged by the emerald ash borer*

future of Fort Atkinson by establishing charitable funds and donating to the Community Foundation. Working together, we make a difference.

Finally, starting in 2017, the Foundation will be presenting Making Fort Special awards to local residents who have championed projects in our community. We look forward to recognizing these spirited civic leaders!

Sincerely,  
Christopher Rogers  
FACF chairman



*Gates Memorial Wall at Hoard Museum*

## OUR MISSION

The mission of the 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.

You can make a difference by donating to a fund listed here or by opening one of your own!

We offer a variety of fund options and will work closely with you to achieve your charitable goals.

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



K9 Veterans Memorial in McCoy Park

## BOARD OF DIRECTORS

Christopher Rogers, chairman  
Mary Behling, vice-chairman  
Kristin Wallace  
Scott Housley  
Michael Bender  
Dean Brown, past chairman

## Annual Financial Report, Year Ending June 30, 2017

[figures rounded to nearest dollar]

Assets on July 1, 2016	\$22,610,998	Rose Inspire-a-Dream	94,423	
Assets on June 30, 2017		Russell Athletic	105,066	
General Fund	\$ 4,422,071	Ralph/Clara Rutledge	170,280	
<b>Acorn Funds:</b>		Schreiner Memorial	338,407	
Vincent Memorial	9,265	Science Matters	10,991	
<b>Designated Funds:</b>		Maurice/Clara Staller	119,024	
Boys & Girls Club	211,610	Thrift Shop/Jean Reich	34,231	
Dwight Foster Library	31,293	Jim/Lee Vance	238,318	
Fort Atk. Historical Society	13,247	Dr. Sydney Weidemann	95,748	
Lorine Niedecker	3,127	Wiederhoeft Legacy	61,878	
Senior Citizens Center	40,388	Phyllis Zeimen Family	107,035	4,515,207
<b>Donor-Advised Funds:</b>		<b>Non-Endowed Project Funds</b>		
Elizabeth Jones Chisholm	15,549	Embraced: Jones Park	2,514	
Gordon F. Day Family	12,245	Fort Tree Fund	15,409	
Kerschensteiner Family	450,308	Friends of Haumerson's Pond	138,915	
Negus Family	130,472	Friends of McCoy Park	17,647	
Schafer Family	206,527	K9 Veterans Memorial	46,078	
Vance Family	77,974	Police Department	24,198	
Ward Knox Family	106,445	Project LEAD	5,958	
<b>Field of Interest Funds:</b>		Don Schink Memorial	2,801	
Beautification Fund	275,137	Water Tower	7,065	260,585
Doris Highsmith Social Serv.	194,640	<b>Non-Endowed Scholarship Funds</b>		
Mary C. Hoard	11,569,237	Barrie Elementary School	7,042	
Bertha/Marilyn Kuhl	2,114,017	Hannah Church Memorial	2,979	
Carol Liddle	68,488	Eagle Scout/Gold Award	6,449	
Pope Memorial Art	74,422	Fort Half Marathon	6,014	
Phyllis/Bob Zeimen	169,633	Lloyd Hake Memorial	46,553	
<b>Scholarship Funds:</b>		Karrels AP Computer Science	41,099	
AAUW Second Chance	276,998	Luther Elementary School	2,505	
Band Booster	8,765	Jake Meinert Memorial	3,733	
Batterman Family	35,482	Purdy Elementary School	10,739	
Walter/Louise Buell	1,537,612	Rockwell Elementary School	2,507	<u>129,619</u>
Orrin/Margaret Bull	8,856			
Dahnert Memorial	25,694	<b>Total Balance, June 30, 2017</b>		<b>\$25,101,506</b>
Fitzpatrick Educator	23,617			
Hake Agriculture	180,148	<b>Summary</b>		
Hake Engineering	154,554	<b>Balance at July 1, 2016</b>		<b>\$22,610,998</b>
Halker Memorial	9,071	Plus:		
Harrison Education	48,994	Interest and Dividends	417,073	
Jones Dairy Industrial Ed	59,738	Investment Gain/Loss	2,167,127	
Robert/Judith Knapp	73,742	Contributions Received	630,263	<u>3,214,463</u>
Knox AAUW	210,396	Minus:		<b>\$25,825,461</b>
James/Frances Luther	106,229	Administrative Expenses	93,233	
Make a Difference	86,449	Investment Management	133,582	
Mathews Education	48,098	Charitable Disbursements	497,140	
Medical Careers	208,833			
Pay It Forward	36,528	<b>Balance at June 30, 2017</b>		<b>\$25,101,506</b>

## OUR IMPACT

Thanks to the generosity of the community it serves, since the Foundation began in 1973, it has poured over \$19.5 million in grants back into the community, making Fort Atkinson a special place to live, work and play.



Ernie Pope Memorial Art Awards

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



2017 Batterman Scholarship recipients with Batterman Executive Director Rebecca Emmons



# Fort Atkinson Community Foundation

## "Where Gifts Today Build Better Tomorrows"

### Making A Difference in Our Community

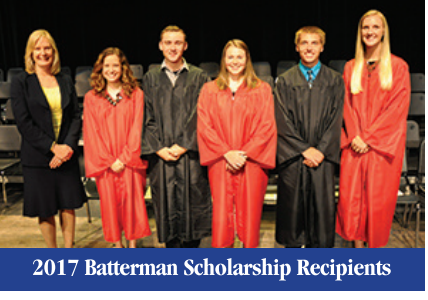
Dear Community,

The Board of Directors of the Fort Atkinson Community Foundation is pleased to present its June 30, 2017 fiscal year financial report.

Thanks to the generosity of so many who care about Fort Atkinson, we were able to grant almost \$250,000 in support of projects improving the fabric of our community. Perhaps nothing illustrates the range of the Foundation's impact better than two of the grants we made this year—one for early literacy computers at the public library to help our youngest of learners, and one to help install a hearing loop system in the Senior Center to help our eldest citizens reap the full benefit of activities there.



Early Literacy Computers for Library



2017 Batterman Scholarship Recipients

The Foundation also worked to improve our community one student at a time with our remarkable scholarship program. This year we distributed over \$250,000 in scholarships, helping our young adults make the most of their educational opportunities.

We were able to make these investments in the community and

in our young people thanks to the many forward-thinking people who continue to 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](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,  
Christopher Rogers, Chairman

### Board of Directors

- Christopher Rogers, Mary Behling,
- Kristin Wallace, Scott Housley,
- Michael Bender



New Trees for the City



Haumerson's Pond Warming House

**"I feel very blessed to have grown up in Fort Atkinson where the community is so supportive of education and invests in our future."**

— Leah (Dahl) O'Connell, 2010 Fort graduate pursuing a Doctor of Nursing Practice degree at University of South Florida, and 2017 recipient of a Juanita Schreiner Memorial and a Walter & Louise Buell Graduate Scholarship.

### ANNUAL FINANCIAL REPORT

#### Year ending June 30, 2017

Assets at Beginning of Year, July 1, 2016		<b>\$22,610,998</b>
Assets as of June 30, 2017		
General Fund:	\$4,422,071	<b>\$4,422,071</b>
Acorn Funds:		
Robert Vincent Memorial Fund	\$9,265	<b>\$9,265</b>
Designated Funds		
Boys and Girls Club Fund	\$211,610	
Dwight Foster Library Fund	\$31,293	
Fort Atkinson Historical Society	\$13,247	
Lorine Niedecker Fund	\$3,127	
Senior Citizens Center Fund	\$40,388	<b>\$299,666</b>
Donor-Advised Funds:		
Elizabeth Jones Chisholm Fund	\$15,549	
Gordon F. Day Family Fund	\$12,245	
Kerschensteiner Family Fund	\$450,308	
Negus Family Fund	\$130,472	
Schafer Family Fund	\$206,527	
Vance Family Fund	\$77,974	
Ward Knox Family Fund	\$106,445	<b>\$999,519</b>
Field of Interest Funds:		
Beautification Fund	\$275,137	
Doris Highsmith Social Services Fund	\$194,640	
Mary C. Hoard Fund	\$11,569,237	
Bertha and Marilyn Kuhl Fund	\$2,114,017	
Carol Liddle Fund	\$68,488	
Pope Memorial Art Fund	\$74,422	
Phyllis and Bob Zeimen Fund	\$169,633	<b>\$14,465,574</b>
Scholarship Funds:		
AAUW Second Chance	\$276,998	
Band Booster	\$8,765	
Batterman Family	\$35,482	
Walter and Louise Buell	\$1,537,612	
Orrin and Margaret Bull Family	\$8,856	
Jason Dahnert Memorial	\$25,694	
Dr. James/Therese Fitzpatrick Educator	\$23,617	
Ben & Ada Hake Agriculture	\$180,148	
Jerome Hake Engineering	\$154,554	
Gene Halker Memorial	\$9,071	
Eileen Harrison Education	\$48,994	
Jones Dairy Farm Industrial Ed	\$59,738	
Robert and Judith Knapp	\$73,742	
Jane Knox A.A.U.W.	\$210,396	
James and Frances Luther	\$106,229	
Make a Difference	\$86,449	
Isabelle Matthews Education	\$48,098	
Medical Careers Scholarship	\$208,833	
Pay it Forward	\$36,528	
Rose Inspire-a-Dream	\$94,423	
Dr. James Russell Athletic	\$105,066	
Ralph and Clara Rutledge	\$170,280	
Juanita Schreiner Memorial	\$338,407	
Science Matters	\$10,991	
Maurice and Clara Staller	\$119,024	
Thrifty Shop/ Jean Reich Memorial	\$34,231	
Jim and Lee Vance	\$238,318	
Dr. Sydney Weidemann	\$95,748	
Ardell Wiederhoeft Legacy	\$61,878	
Phyllis Zeimen Family	\$107,035	<b>\$4,515,207</b>
Non Endowed Project Funds:		
Embraced: Jones Park	\$2,514	
Fort Tree Fund	\$15,409	
Friends of Haumerson's Pond	\$138,915	
Friends of McCoy Park	\$17,647	
K9 Veterans Memorial	\$46,078	
Police Department Fund	\$24,198	
Project Lead	\$5,958	
Schink Memorial Fund	\$2,801	
Water Tower Fund	\$7,065	<b>\$260,585</b>
Non Endowed Scholarship Funds:		
Barrie Elementary School	\$7,042	
Hannah Church Memorial	\$2,979	
Eagle Scout and Gold Award	\$6,449	
Fort Half Marathon	\$6,014	
Lloyd Hake Memorial	\$46,553	
Ed Karrels AP Computer Science	\$41,099	
Luther Elementary School	\$2,505	
Jake Meinert Memorial	\$3,733	
Purdy Elementary School	\$10,739	
Rockwell Elementary School	\$2,507	<b>\$129,619</b>
<b>Total Fund Balance, June 30, 2017</b>		<b>\$25,101,506</b>
<b>Contributions Received This Year:</b>		
General Fund	\$30,791	
Acorn Funds:		
Robert Vincent Memorial Acorn Fund	\$50	<b>\$50</b>
Designated Funds		
Boys & Girls Club	\$71,818	
Dwight Foster Library	\$8,650	
Fort Atkinson Historical Society	\$13,194	
Lorine Niedecker	\$100	<b>\$93,763</b>
Donor-Advised Funds:		
Elizabeth Jones Chisholm	\$4,000	
Day Family Fund	\$500	
Negus Family Fund	\$10,158	
Vance Family Fund	\$8	
Ward Knox Family Fund	\$99,347	<b>\$114,013</b>
Scholarship Funds:		
AAUW Second Chance	\$3	
Batterman Family	\$54,000	
Orrin and Margaret Bull	\$3,000	
Jason Dahnert Memorial	\$815	
Dr. James/Therese Fitzpatrick Educator	\$1,100	
Ben and Ada Hake Agriculture	\$14,589	

Jerome Hake Engineering	\$14,589	
Robert and Judith Knapp	\$7,500	
Jane Knox A.A.U.W	\$3,200	
Janes/Frances Luther	\$60,200	
Make a Difference	\$500	
Pay it Forward	\$1,200	
Rose Inspire-a-Dream	\$1,000	
Science Matters	\$11,000	
Thrifty Shop/ Jean Reich Memorial	\$700	<b>\$173,395</b>
<b>Non Endowed Project Funds:</b>		
Boys and Girls Club	\$1,048	
Embraced: Jones Park	\$500	
Fort Tree Fund	\$15,478	
Friends of Haumerson's Pond	\$94,310	
Friends of McCoy Park	\$1,350	
K9 Veterans Memorial	\$31,783	
Police Department Fund	\$18,303	
Project Lead	\$6,005	
Water Tower Fund	\$240	<b>\$169,017</b>
<b>Non Endowed Scholarship Funds:</b>		
Barrie Elementary School	\$2,000	
Hannah Church Memorial	\$3,044	
Eagle Scout and Gold Award	\$650	
Fort Half Marathon	\$6,123	
Lloyd Hake Memorial	\$14,589	
Ed Karrels Computer Science	\$20,410	
Jake Meinert	\$1,919	
Rockwell School	\$500	<b>\$49,234</b>
<b>Total Contributions Received This Year:</b>		<b>\$630,263</b>
<b>Charitable Disbursements:</b>		
General Fund		<b>\$1,250</b>
Designated Funds		
Dwight Foster Library Fund	\$3,718	
Lorine Niedecker Fund	\$2,500	
Senior Citizens Center Fund	\$13,500	<b>\$19,718</b>
Donor-Advised Funds:		
Negus Family Fund	\$6,000	<b>\$6,000</b>
Field of Interest Funds:		
Doris Highsmith Social Services	\$2,950	
Mary C. Hoard Fund	\$6,500	
Bertha & Marilyn Kuhl	\$10,000	
Carol Liddle Fund	\$1,794	
Pope Memorial Art Fund	\$1,150	<b>\$22,394</b>
Scholarship Funds:		
AAUW Second Chance	\$5,625	
Batterman Family	\$58,500	
Walter and Louise Buell	\$68,000	
Orrin and Margaret Bull	\$500	
Jason Dahnert Memorial	\$3,500	
Fitzpatrick Educator	\$2,000	
Ben and Ada Hake Agriculture	\$10,600	
Jerome Hake Engineering	\$6,300	
Gene Halker Memorial	\$400	
Eileen Harrison Education	\$2,000	
Robert and Judith Knapp	\$2,500	
Knox A.A.U.W	\$8,500	
Make a Difference	\$5,000	
Medical Careers	\$8,000	
Pay It Forward	\$1,200	
Rose Inspire-a-Dream	\$1,000	
Dr. James Russell Athletic	\$3,000	
Ralph and Clara Rutledge Memorial	\$7,000	
Juanita Schreiner Memorial	\$14,566	
Maurice and Clara Staller	\$5,000	
Thrifty Shop/ Jean Reich Memorial	\$2,000	
Jim and Lee Vance	\$8,000	
Dr. Sydney Weidemann	\$6,000	
Ardell Wiederhoeft Legacy	\$1,800	<b>\$230,991</b>
Non Endowed Project Funds:		
Friends of Haumerson's Pond	\$160,186	
Friends of McCoy Park	\$581	
K9 Veterans Memorial	\$14,475	
Project Lead	\$17,754	
Water Tower Fund	\$42	<b>\$193,037</b>
Non Endowed Scholarship Funds:		
Eagle Scout and Gold Award	\$1,750	
Ed Karrels Computer Science	\$10,000	
Fort Half Marathon	\$6,000	
Lloyd Hake Memorial	\$4,000	
Jake Meinert Memorial	\$1,000	
Purdy School	\$500	
Rockwell School	\$500	<b>\$23,750</b>
<b>Total Charitable Disbursements This Year:</b>		<b>\$497,140</b>
<b>Summary: Balance at July 1, 2016</b>		<b>\$22,610,998</b>
Interest and Dividends	\$417,073	
Gain on Investments	\$2,167,127	
Contributions Received	\$630,263	<b>\$3,214,463</b>
<b>Balance Before Expenses/Disbursements</b>		<b>\$25,825,461</b>
Administrative Expenses	\$93,233	
Investment Management	\$133,582	
Charitable Disbursements	\$497,140	<b>\$723,955</b>
<b>Balance at June 30, 2017</b>		<b>\$25,101,506</b>

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 \$19.5 million in grants back into the community, making Fort Atkinson a special place to live, work and play.