



Fort Atkinson Community Foundation 2018-19 Annual Report

Vision: A Better Fort Atkinson

For A Better Fort Atkinson

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.

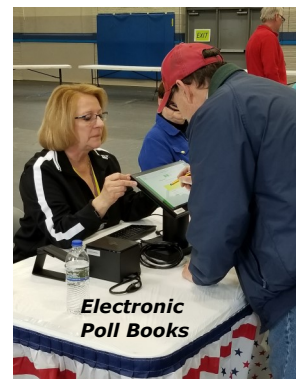
The Community Foundation is a 501(c)3 organization.
Your contribution is fully tax-deductible.



Riverwalk Plaza

Dear Community,

The Fort Atkinson Community Foundation has been in the business of making Fort a better place to live for over 40 years. You cannot drive downtown or stroll through any of our parks without witnessing the impact FACF has had on our community.



This past year, the Board of Directors took a pause to take stock of these noteworthy accomplishments and then to review how we tell our story. We decided to restate our vision in a straightforward, compelling manner. You will see it stated above. It is what we have done and what we will continue to do . . . make Fort better!

We also want to emphasize that our Board acts as a steward of the funds that have been donated over the years and decides how and where to support projects. But this does not even begin to happen unless we have



Stadium seating at Memorial Park's baseball field



Buell Merit Scholarship recipients

community members and organizations who champion those projects. It is impossible for five board members to understand all the needs of our community and we depend heavily on project champions who get behind an improvement and then take it through to the finish line. This is how hundreds of our projects have come to be over the years. We are thankful for the help.

In addition, our local scholarship program for high school graduating seniors and past Fort graduates and residents is one of the best around. We also have a growing portfolio of designated funds set up to help area non-profits like our Fort Atkinson Food Pantry Fund. These have only added to the many ways through which you can help us help others.

So, please take a moment and enjoy perusing through this little brochure and feeling pride in our community!

Sincerely,
Kristin S. Wallace
FACF Chairman

Where gifts today
build better tomorrows

www.fortfoundation.org



Niedecker Poetry Wall 2.0

DESIGNATED FUNDS



Designated Funds support specific charities or projects. The Fort Tree Fund supports the local Beautification Council in its efforts to replace our urban canopy after the damage caused by the emerald ash borer.

Designated Funds held at the Community Foundation:

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

DONOR-ADVISED FUNDS



Our Donor-Advised Funds are opened by families who are then able to recommend grants from their fund in support of causes they care about.

A new upgrade of the caretaker's cottage at Evergreen Cemetery, a building important to late fundholders Mark and Val Kerschensteiner, was paid for by a grant from the Kerschensteiner Family Fund, as recommended by their daughter and grandson who continue on as fund advisors and continue to support causes important to Mark and Val.

SCHOLARSHIP FUNDS

\$295,665

paid in scholarships to 101 local students
and

\$376,200

awarded in scholarships to 88 local students



Scholarship Funds held at the Community Foundation:

| | |
|-----------------------------|------------------------|
| AAUW Grants for Gals | Knox AAUW |
| AAUW Second Chance | James/Frances Luther |
| Batterman Family | Make a Difference |
| 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 |

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, 2019

[figures rounded to nearest dollar]

| | |
|---------------------------------|---------------------|
| Balance at July 1, 2018 | \$25,989,473 |
| Plus: | |
| Interest and Dividends | 623,198 |
| Investment Gain/Loss | 747,962 |
| Contributions Received | 1,700,685 |
| | \$29,061,319 |
| Minus | |
| Administrative Expenses | 103,305 |
| Investment Management | 148,498 |
| Charitable Disbursements | 594,665 |
| Balance at June 30, 2019 | \$28,214,851 |

FACF BOARD OF DIRECTORS

Kristin S. Wallace, Chairman
 Scott Housley, Vice-Chairman
 Michael Bender, Treasurer
 Loren Gray, Secretary
 Sue Johnson, Director
 Mary J. Behling, Past Chairman

FIELD OF INTEREST FUNDS



Arts, recreation, education, historic preservation . . . or all of the above? Field of Interest Funds can support your passions, like our Mary Hoard Fund which will, now and forever, be doing great work for our community, most recently funding a new Innovation Lab at Luther Elementary School.

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 | |

ACORN FUNDS



Acorn Funds open small and have five years to grow into mature funds. Two have already grown up, and our third, the Fort Atkinson Club Fund is still growing. Once it reaches \$15,000, it will

become a source of permanent support for the Fort Atkinson Club in downtown Fort Atkinson.

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



Fort Atkinson Community Foundation

Where Gifts Today Build Better Tomorrows

Vision: A Better Fort Atkinson

Dear Community,

The Fort Atkinson Community Foundation has been in the business of making Fort a better place to live for over 40 years. You cannot drive downtown or stroll through any of our parks without witnessing the impact FACF has had on our community.

This past year, the Board of Directors took a pause to take stock of these many accomplishments and to review how we tell our story. We decided to restate our vision in a simple and compelling manner. You will see it stated above. It is what we have done and what we will continue to do . . . make Fort better!



Riverwalk Plaza

We also want to emphasize that our Board acts as a steward of the funds that have been donated over the years and decides how and where to support projects. But this does not even begin to happen unless we have community members and organizations who champion those projects. It is impossible for five board members to understand all the needs of our community and we depend heavily on project champions who get behind an improvement and then take it through to the finish line. This is how hundreds of our projects have come to be over the years. We are thankful for the help.



Innovation Lab at Luther School

In addition, our local scholarship program for high school graduating seniors and past Fort graduates and residents is one of the best around. We also have a growing portfolio of designated funds set up to help area non-profits like our Fort Atkinson Food Pantry Fund. These have only added to the many ways through which you can help us help others.

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,

Kristin S. Wallace, FACF Chairman

Board of Directors

Kristin Wallace, Scott Housley
Michael Bender, Loren Gray
Sue Johnson



2019 Bingham Memorial Scholarship recipients



Stadium Seating at Memorial Park

"To say I am appreciative is an understatement! When I took a gap in my schooling, I always hoped I would look back in time from some far-off place and marvel at how far I'd come. You have helped me keep moving in the right direction and to look at my future with a smile!"

- Alexis Timmel, nursing student at Madison College and recipient of our AAUW Second Chance and Lloyd Hake Voc Tech scholarships

ANNUAL FINANCIAL REPORT Year ending June 30, 2019

| | | |
|---|--------------|---------------------|
| Assets at Beginning of Year, July 1, 2018 | | \$25,989,473 |
| Assets as of June 30, 2019 | | |
| General Fund | \$4,743,962 | \$4,743,962 |
| Acorn Funds: | | |
| Fort Atkinson Club Community (4/2019) | \$6,864 | \$6,864 |
| Designated Funds: | | |
| BASE Fund | \$221,284 | |
| Classroom Teacher Wish Fund | \$103,998 | |
| Dwight Foster Library Fund | \$51,519 | |
| Fort Atkinson Food Pantry Fund | \$16,128 | |
| Fort Atkinson Historical Society | \$16,717 | |
| Lorine Niedecker Fund | \$4,629 | |
| Police Dept. K9 Unit Fund | \$29,478 | |
| Senior Citizens Center Fund | \$43,472 | \$487,226 |
| Donor-Advised Funds: | | |
| Elizabeth Jones Chisholm Fund | \$21,365 | |
| Gordon F. Day Family Fund | \$13,720 | |
| Kerschensteiner Family Fund | \$475,397 | |
| Negus Family Fund | \$246,570 | |
| Schafer Family Fund | \$219,182 | |
| Vance Family Fund | \$59,515 | |
| Robert James Vincent 'Mr. V' Fund | \$15,343 | |
| Ward Knox Family Fund | \$109,262 | \$1,160,353 |
| Field of Interest Funds: | | |
| Beautification Fund | \$291,724 | |
| Bertha & Marilyn Kuhl Fund | \$2,287,674 | |
| Carol Liddle Fund | \$73,617 | |
| Doris Highsmith Social Services | \$202,672 | |
| Mary C. Hoard Fund | \$12,401,369 | |
| Phyllis & Bob Zeimen Fund | \$182,337 | |
| Pope Memorial Art Fund | \$77,613 | \$15,517,007 |
| Scholarship Funds: | | |
| AAUW Grants for Gals Fund | \$17,416 | |
| AAUW Second Chance | \$279,454 | |
| Ardell Wiederhoeft Legacy | \$62,118 | |
| Ben and Ada Hake Agriculture | \$207,578 | |
| Dr. James/Therese Fitzpatrick Educator | \$24,169 | |
| Dr. James Russell Athletic | \$104,826 | |
| Dr. Sydney H. Weidemann | \$92,872 | |
| Eileen Harrison Education | \$48,118 | |
| Fireside Theatre | \$20,106 | |
| FA Thrift Shop/Jean Reich | \$34,119 | |
| Fred/Helen Rose Inspire-a-Dream | \$104,964 | |
| Gene Halker Memorial | \$7,611 | |
| Hannah Church Memorial | \$15,441 | |
| Isabelle Mathews Education | \$49,187 | |
| James and Frances Luther | \$103,880 | |
| Jane Knox AAUW Scholarship | \$207,271 | |
| Jason Dahnert Memorial | \$23,970 | |
| Jerome Hake Engineering | \$154,688 | |
| Jones Dairy Farm | \$58,713 | |
| Juanita Schreiner Memorial | \$336,047 | |
| Kathleen Grabil Thorndike | \$57,936 | |
| Make A Difference Scholarship | \$83,780 | |
| Maurice and Clara Staller | \$119,711 | |
| Medical Careers Scholarship | \$208,512 | |
| Orrin and Margaret Bull Family | \$18,398 | |
| Pay It Forward Scholarship | \$39,703 | |
| Phyllis Zeimen Scholarship | \$105,890 | |
| Ralph/Clara Rutledge Memorial | \$167,930 | |
| Richard Noel Bingham Memorial | \$1,141,520 | |
| Robert and Judith Knapp | \$111,721 | |
| Science Matters Scholarship | \$52,844 | |
| Theodore W. Batterman Family | \$46,319 | |
| Jim and Lee Vance Scholarship | \$235,603 | |
| Victor and Ruth Johnson Scholarship | \$17,731 | |
| Walter and Louise Buell | \$1,524,747 | \$5,884,892 |
| Non-Endowed Project Funds: | | |
| Embraced: Jones Park | \$2,549 | |
| Fort Tree Fund | \$9,905 | |
| Fort Wheels Park Fund | \$151,010 | |
| Friends of Haumerson's Pond | \$48,435 | |
| Friends of McCoy Park | \$17,069 | |
| Police Department DARE Fund | \$10,690 | |
| Project Lead Fund | \$20,516 | |
| Water Tower Fund | \$8,248 | \$268,422 |
| Non-Endowed Scholarship Funds: | | |
| Barrie School Scholarship | \$7,767 | |
| Eagle Scout & Gold Award | \$6,252 | |
| Ed Karrels AP Computer Science | \$51,291 | |
| Jake Meinert Memorial | \$4,298 | |
| Lloyd Hake Scholarship | \$58,571 | |
| Luther School Scholarship | \$3,538 | |
| Purdy School Scholarship | \$9,878 | |
| Rockwell School Scholarship | \$2,061 | |
| David Veith Memorial Scholarship | \$2,472 | \$146,126 |
| Total Fund Balance, June 30, 2019 | | \$28,214,851 |
| Contributions Received This Year: | | |
| General Fund | | \$47,955 |
| Acorn Funds: | | |
| Grants for Gals (7/2018) | \$16,750 | |
| Fort Atkinson Club Community (4/2019) | \$6,600 | \$23,350 |
| Designated Funds: | | |
| BASE Club Fund | \$23,469 | |
| Dwight Foster Library Fund | \$9,650 | |
| Fort Atkinson Food Pantry Fund | \$15,225 | |
| Fort Atkinson Historical Society Fund | \$500 | |
| Lorine Niedecker Fund | \$100 | |
| Police Dept. K9 Unit Fund | \$14,624 | \$63,568 |
| Donor-Advised Funds: | | |
| Elizabeth Jones Chisholm Fund | \$4,202 | |
| Gordon F. Day Family Fund | \$250 | |
| Negus Family Fund | \$108,603 | \$113,055 |
| Field of Interest Funds: | | |
| Beautification Fund | \$100 | |
| Doris Highsmith Social Services | \$150 | \$250 |
| Scholarship Funds: | | |
| Ben and Ada Hake Agriculture | \$15,593 | |
| FA Thrift Shop/Jean Reich | \$600 | |
| Fred/Helen Rose Inspire-a-Dream | \$6,125 | |
| Jane Knox AAUW Scholarship | \$2,100 | |

| | | |
|--|-------------|---------------------|
| Jerome Hake Engineering | \$15,593 | |
| Jones Dairy Farm | \$100 | |
| Make A Difference Scholarship | \$600 | |
| Orrin and Margaret Bull Family | \$4,755 | |
| Pay It Forward Scholarship | \$2,225 | |
| Richard Noel Bingham Memorial | \$1,085,149 | |
| Robert and Judith Knapp | \$8,000 | |
| Science Matters Scholarship | \$23,000 | |
| Theodore W. Batterman Family | \$57,010 | |
| Jim and Lee Vance Scholarship | \$5,000 | |
| Victor and Ruth Johnson Scholarship | \$18,082 | \$1,243,932 |
| Non Endowed Project Funds: | | |
| Fort Tree Fund | \$7,275 | |
| Fort Wheels Park Fund | \$121,330 | |
| Friends of Haumerson's Pond | \$20,455 | |
| Friends of McCoy Park | \$300 | |
| Police Department DARE Fund | \$3,269 | |
| Project Lead Fund | \$20,573 | |
| Water Tower Fund | \$745 | \$173,946 |
| Non Endowed Scholarship Funds: | | |
| Barrie School Scholarship | \$625 | |
| Eagle Scout & Gold Award | \$1,000 | |
| Ed Karrels AP Computer Science | \$13,266 | |
| Jake Meinert Memorial | \$120 | |
| Lloyd Hake Scholarship | \$15,593 | |
| Luther School Scholarship | \$1,500 | |
| Rockwell School Scholarship | \$25 | |
| David Veith Memorial Scholarship | \$2,500 | \$34,629 |
| Total Contributions Received This Year: | | \$1,700,685 |
| Charitable Disbursements This Year: | | |
| General Fund | | \$55,355 |
| Designated Funds: | | |
| BASE Club Fund | \$70,000 | |
| Fort Atkinson Historical Society Fund | \$628 | \$70,628 |
| Donor-Advised Funds: | | |
| Kerschensteiner Family Fund | \$8,621 | |
| Negus Family Fund | \$16,000 | |
| Schafer Family Fund | \$12,500 | |
| Vance Family Fund | \$20,000 | \$57,121 |
| Field of Interest Funds: | | |
| Beautification Fund | \$2,987 | |
| Bertha & Marilyn Kuhl Fund | \$35,625 | |
| Doris Highsmith Social Services | \$4,551 | |
| Mary C. Hoard Fund | \$13,376 | |
| Pope Memorial Art Fund | \$1,150 | \$57,688 |
| Scholarship Funds: | | |
| AAUW Second Chance | \$9,000 | |
| Ardell Wiederhoeft Legacy | \$2,000 | |
| Ben and Ada Hake Agriculture | \$8,000 | |
| Dr. James/Therese Fitzpatrick Educator | \$1,000 | |
| Dr. James Russell Athletic | \$3,000 | |
| Dr. Sydney H. Weidemann | \$6,000 | |
| Eileen Harrison Education | \$2,000 | |
| FA Thrift Shop/Jean Reich | \$1,000 | |
| Fred/Helen Rose Inspire-a-Dream | \$1,000 | |
| Gene Halker Memorial | \$1,000 | |
| Hannah Church Memorial | \$1,000 | |
| Isabelle Mathews Education | \$2,000 | |
| James and Frances Luther | \$4,000 | |
| Jane Knox AAUW Scholarship | \$11,700 | |
| Jerome Hake Engineering | \$22,000 | |
| Jones Dairy Farm | \$1,250 | |
| Juanita Schreiner Memorial | \$11,890 | |
| Kathleen Grabil Thorndike | \$1,000 | |
| Make A Difference Scholarship | \$5,000 | |
| Maurice and Clara Staller | \$3,025 | |
| Medical Careers Scholarship | \$7,000 | |
| Pay It Forward Scholarship | \$1,500 | |
| Phyllis Zeimen Scholarship | \$4,000 | |
| Ralph/Clara Rutledge Memorial | \$7,000 | |
| Richard Noel Bingham Memorial | \$11,300 | |
| Robert and Judith Knapp | \$3,000 | |
| Science Matters Scholarship | \$1,000 | |
| Theodore W. Batterman Family | \$54,000 | |
| Jim and Lee Vance Scholarship | \$11,500 | |
| Victor and Ruth Johnson Scholarship | \$5,000 | |
| Walter and Louise Buell | \$65,000 | \$262,665 |
| Non Endowed Project Funds: | | |
| Fort Tree Fund | \$7,340 | |
| Friends of Haumerson's Pond | \$6,474 | |
| Friends of McCoy Park | \$383 | |
| K9 Veterans Memorial Project Fund | \$57 | |
| Police Department DARE Fund | \$4,105 | |
| Project Lead Fund | \$37,531 | |
| Schink Fund | \$2,818 | \$58,708 |
| Non Endowed Scholarship Funds: | | |
| Barrie School Scholarship | \$500 | |
| Eagle Scout & Gold Award | \$500 | |
| Ed Karrels AP Computer Science | \$17,500 | |
| Lloyd Hake Scholarship | \$10,500 | |
| Purdy School Scholarship | \$500 | |
| David Veith Memorial Scholarship | \$3,000 | \$32,500 |
| Total Charitable Disbursements This Year: | | \$594,665 |
| Summary: Balance at July 1, 2018 | | \$25,989,473 |
| Interest and Dividends | \$623,198 | |
| Gain on Investments | \$747,962 | |
| Contributions Received | \$1,700,685 | \$3,071,846 |
| Balance Before Expenses/Disbursements | | \$29,061,319 |
| Administrative Expenses | \$103,305 | |
| Investment Management | \$148,498 | |
| Charitable Disbursements | \$594,665 | \$846,468 |
| Balance at June 30, 2019 | | \$28,214,851 |

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 improve the quality of life in Fort Atkinson by inspiring and supporting enduring philanthropy. Since the Foundation began in 1973, it has distributed almost \$21 million in grants to our local community, making Fort Atkinson a special place to live, work and play.