



Fort Atkinson Community Foundation 2014-15 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 support the Fort Atkinson Community Foundation provides to students, both in high school and pursuing post-graduate education, is humbling and inspiring."

Sara Rothberger, 2008 FAHS graduate, doctoral student at UNC-Greensboro, and current holder of two FAFS scholarships."



Boys & Girls Club at Barrie School

Where gifts today build better tomorrows

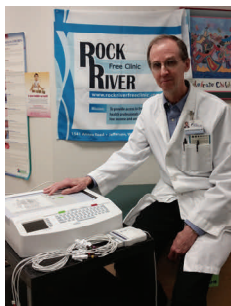
www.fortfoundation.org

Fostering success in our community

Dear Community,

The Board of Directors of the Fort Atkinson Community Foundation is pleased to present its June 30, 2015 fiscal year financial report.

Thanks to the generosity of our donors, the Foundation was able to disburse a remarkable \$2,175,649 in support of many projects. A large portion of that went toward the renovation of the Fort Atkinson Club, for which donations had



EKG machine for RRFC

poured in during our last fiscal year. Other brick and mortar projects receiving Foundation grants included the Humane Society's new shelter and the remodeling of the National Dairy Shrine's Visitors Center. Projects benefiting the youth in our community included scoreboards at Memorial Park & JF Luther, playground equipment for Trailways Park, and the new Barrie School site for the Boys & Girls Club.



Restoration and renovation of the Fort Atkinson Club



2015 Walter and Louise Buell Merit Scholarship recipients with FAFS chairman W. Phil Niemeyer

In addition, we were thrilled to make payments on 69 scholarships held by 61 undergraduate students, and on 19 more held by 15 graduate students – all from the Fort Atkinson area. The total paid for these 88 scholarships was \$215,601.

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.

One of the benefits of a Foundation is that we can award grants recommended to us by our donor-advised fundholders in support of local causes that are important to them. For example, this year a grant from our Gordon Day Family Fund helped the city upgrade our airport runway and a Kerschensteiner Fund grant helped repair the Sexton House in Evergreen Cemetery. This is the foundation at its best.

Sincerely,
W. Phil Niemeyer, FAFS 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 \$18 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.



Roofing of Fort Cosconong Guard Towers

BOARD OF DIRECTORS

W. Phil Niemeyer, chairman
 Dean Brown, vice-chairman
 Christopher Rogers
 Mary Behling
 Kristin Wallace
 Beth McLaughlin, past chairman

Annual Financial Report, Year Ending June 30, 2015

[figures rounded to nearest dollar]

Assets on July 1, 2014		\$23,910,419	
Assets on June 30, 2015			
General Fund		\$ 3,959,833	
Scholarship Funds:			
AAUW Second Chance	167,727		
Band Booster	8,012		
Batterman Family Fnd.	36,458		
Walter/Louise Buell	1,537,257		
Orrin/Margaret Bull	5,699		
Dahnert Memorial	27,471		
Fitzpatrick Educator	21,142		
Hake Agriculture	140,616		
Hake Engineering	115,269		
Halker Memorial	9,079		
Harrison Education	48,725		
Jones Dairy Tech Ed	57,216		
Robert/Judith Knapp	57,211		
Knox AAUW	207,130		
James/Frances Luther	40,118		
Mathews Education	46,118		
Medical Careers	207,161		
Pay It Forward	32,360		
Rose Dream	85,557		
Russell Athletic	102,798		
Ralph/Clara Rutledge	169,872		
Schreiner Memorial	336,910		
Maurice/Clara Staller	117,544		
Thrift Shop/Jean Reich	34,673		
Dr. Sydney Weidemann	101,613		
Wiederhoeft Legacy	61,592	3,775,328	
Field of Interest Funds:			
Beautification Fund	278,514		
Boys & Girls Club Inv.	26,120		
Dwight Foster Library	16,843		
Doris Highsmith	179,204		
Mary C. Hoard	10,549,760		
Bertha/Marilyn Kuhl	2,028,083		
Carol Liddle	64,096		
Lorine Niedecker	5,167		
Pope Memorial Art	69,700		
Senior Citizens Center	49,786		
Phyllis/Bob Zeimen	270,819	13,538,093	
Acorn Funds:			
Vincent Memorial	8,232	8,232	

Donor-Advised Funds			
Elizabeth Jones Chisholm	10,207		
Gordon F. Day Family	10,092		
Kerschensteiner Family	408,407		
Negus Family	108,926		
Schafer Family	187,309		
Vance Family	34,429	759,369	
Pass-Through Project Funds			
Boys & Girls Club	50,675		
BGC—Rose Memorial	1,077		
Embraced: Jones Park	11,918		
Fire Department	126		
Friends of Haumerson's Pond	241,095		
Friends of McCoy Park	15,434		
Performing Arts	242		
Project Lead	13,072		
Rock River Heritage	6		
Don Schink Memorial	2,795		
Theater Project	1,578		
Water Tower	14,452	350,891	
Pass-Through Scholarship Funds			
Barrie Elementary School	4,530		
Eagle Scout/Gold Award	3,162		
ELL Bilingual Student	1,391		
Fort Half Marathon	6,001		
Lloyd Hake Memorial	11,654		
Karrels Computer Science	33,027		
Luther Elementary School	2,484		
Jake Meinert Memorial	3,737		
Purdy Elementary School	9,217		
Rockwell Elementary School	2,502	77,708	
Total Balance, June 30, 2015			\$22,469,454
<u>Summary</u>			
Balance at July 1, 2014			\$23,910,419
Plus:			
Interest and Dividends	432,752		
Gain on Investments	143,546		
Contributions Received	572,914		
Minus:		25,059,631	
Administrative Expenses	81,954		
Investment Management	116,972		
Charitable Disbursements	2,391,251		
Balance at June 30, 2015			\$22,469,454

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 a fund of your own.

OPEN A FUND

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.



2015 Lloyd Hake Scholarship recipients with Lloyd's grand-niece Rochelle Mitchell

To learn more about our funds or ways of giving, please visit www.fortfoundation.org or contact FAF program administrator Sue Hartwick at (920) 222-1191 or facf@fortfoundation.org.



Fort Atkinson Community Foundation

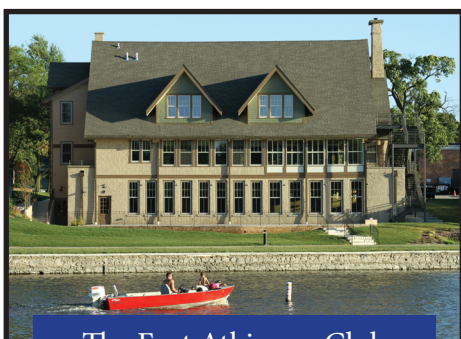
"Where Gifts Today Build Better Tomorrows"

Fostering Success in our Community

Dear Community,

The Board of Directors of the Fort Atkinson Community Foundation is pleased to present its June 30, 2015 fiscal year financial report.

Thanks to the generosity of our donors, who share a love for Fort Atkinson and want to make this an even better community, the Foundation was able to disburse a remarkable \$2,175,649 in support of many projects. A significant amount of funds went toward the renovation of the Fort Atkinson Club, for which donations had poured in during our last fiscal year. Other brick and mortar projects receiving Foundation grants included the Humane Society's new shelter and the remodeling of the National Dairy Shrine's Visitors Center. Projects benefiting the youth in our community included scoreboards at Memorial Park and JF Luther, playground equipment for Trailways Park, and the new Barrie School site for the Boys & Girls Club.



The Fort Atkinson Club



Lloyd Hake Scholarship Recipients

A large part of our effort goes toward scholarships. During the year, we made payments on 88 scholarships held by 76 students from the Fort Atkinson area, totaling an impressive \$215,601.

How are we able to do this? Some of these scholarships were set up by communi-

ty members who are no longer with us but their generosity and forward-thinking will continue for generations under the Community Foundation's structure. Other scholarships are from current donations. All recipients are chosen by community members who serve on committees. Are you someone that might want to help students in the future? If so, contact us.

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

Sincerely,
W. Phil Niemeyer, FAFD Chairman



EKG machine for Rock River Clinic

Board of Directors

W. Phil Niemeyer Dean Brown Christopher Rogers
Mary Behling Kristin Wallace

"The support the Fort Atkinson Community Foundation provides to students, both in high school and pursuing post-graduate education, is humbling and inspiring."

Sara Rothberger, 2008 FAHS graduate, doctoral student at the University of North Carolina-Greensboro, and current recipient of two FAFD scholarships.

ANNUAL FINANCIAL REPORT

Year ending June 30, 2015

All figures rounded to the nearest dollar

Assets at Beginning of Year, July 1, 2014		\$23,910,419
Assets as of June 30, 2014		
General Fund:		\$3,959,833
Endowed Scholarship Funds:		
AAUW Second Chance	\$167,727	
Band Booster	\$8,012	
Batterman Family	\$36,458	
Walter and Louise Buell	\$1,537,257	
Orrin and Margaret Bull Family	\$5,699	
Jason Dahmert Memorial	\$27,471	
Dr. James/Therese Fitzpatrick Educator	\$21,142	
Ben & Ada Hake Agriculture	\$140,616	
Jerome Hake Engineering	\$115,269	
Gene Halker Memorial	\$9,079	
Eileen Harrison Education	\$48,725	
Jones Dairy Farm Industrial Ed	\$57,216	
Robert and Judith Knapp	\$57,211	
Knox A.A.U.W.	\$207,130	
James and Frances Luther	\$40,118	
Isabelle Matthews Education	\$46,118	
Medical Careers Scholarship	\$207,161	
Pay it Forward	\$32,360	
Rose Inspire-a-Dream	\$85,557	
Dr. James Russell Athletic	\$102,798	
Ralph and Clara Rutledge	\$169,872	
Juanita Schreiner Memorial	\$336,910	
Maurice and Clara Staller	\$117,544	
Thrift Shop/ Jean Reich Memorial	\$34,673	
Dr. Sydney Weidemann	\$101,613	
Ardell Wiederhoeft Legacy	\$61,592	\$3,775,328
Donor-Advised Funds:		
Elizabeth Jones Chisholm Fund	\$10,207	
Gordon F. Day Family Fund	\$10,092	
Kerschensteiner Family Fund	\$408,407	
Negus Family Fund	\$108,926	
Schafer Family Fund	\$187,309	
Vance Family Fund	\$34,429	\$759,369
Field of Interest Funds:		
Beautification Fund	\$278,514	
Boys and Girls Club Inv. Fund	\$26,120	
Dwight Foster Library Fund	\$16,843	
Doris Highsmith Social Services Fund	\$179,204	
Mary C. Hoard Fund	\$10,549,760	
Bertha and Marilyn Kuhl Fund	\$2,028,083	
Carol Liddle Fund	\$64,096	
Lorine Niedecker Fund	\$5,167	
Pope Memorial Art Fund	\$69,700	
Senior Citizens Center Fund	\$49,786	
Phyllis and Bob Zeimen Fund	\$270,819	\$13,538,093
Acorn Funds:		
Robert Vincent Memorial Fund	\$8,232	\$8,232
Scholarship Pass-Through Funds:		
Barrie Elementary School	\$4,530	
Eagle Scout and Gold Award	\$3,162	
ELL Bilingual Student	\$1,391	
Fort Half Marathon	\$6,001	
Lloyd Hake Memorial	\$11,654	
Ed Karrels Computer Science	\$33,027	
Luther Elementary School	\$2,484	
Jake Meinert Memorial	\$3,737	
Purdy Elementary School	\$9,217	
Rockwell Elementary School	\$2,502	\$77,708
Project Pass-Through Funds:		
Boys and Girls Club	\$50,675	
BGC - Rose Memorial Fund	\$1,077	
Embraced: Jones Park	\$11,918	
Fire Department Fund	\$126	
Friends of Haumerson's Pond	\$241,095	
Friends of McCoy Park	\$15,434	
Performing Arts Fund	\$242	
Project Lead	\$13,072	
Rock River Heritage Fund	\$6	
Schink Memorial Fund	\$2,795	
Water Tower Fund	\$14,452	\$350,891
Total Fund Balance, June 30, 2015		\$22,469,454

Contributions Received This Year:		
General Fund:		\$18,770
Endowed Scholarship Funds:		
AAUW Second Chance	\$10,181	
Batterman Family	\$60,000	
Dr. James/Therese Fitzpatrick Educator	\$6,186	
Ben and Ada Hake Agriculture	\$5,126	
Jerome Hake Engineering	\$5,126	
Robert and Judith Knapp	\$8,000	
Knox A.A.U.W.	\$4,780	
Medical Careers	\$200,000	
Pay it Forward	\$1,620	
Rose Inspire-a-Dream	\$1,450	
Dr. James Russell Athletic	\$413	
Juanita Schreiner Memorial	\$200	
Thrift Shop/ Jean Reich Memorial	\$1,000	\$304,081
Ardell Wiederhoeft Legacy		

Donor-Advised Funds:		
Negus Family Fund	\$11,849	\$11,849
Field Of Interest Funds:		
Dwight Foster Library Fund	\$10,575	\$10,575
Acorn Funds:		
Robert Vincent Memorial Acorn Fund	\$5,110	\$5,110
Scholarship Pass-Through Funds:		
Barrie Elementary School	\$1,000	
Eagle Scout and Gold Award	\$250	
Lloyd Hake Memorial	\$5,126	
Ed Karrels Computer Science	\$20,410	
ELL Bilingual Student	\$1,419	
Fort Half Marathon	\$6,123	
Rockwell Elementary School	\$500	\$34,828
Project Pass-Through Funds:		
Boys and Girls Club	\$27,964	
Embraced: Jones Park	\$12,090	
Friends of Haumerson's Pond	\$89,645	
Friends of McCoy Park	\$1,650	
Project Lead	\$13,407	
Rock River Heritage Fund	\$30,675	
Water Tower Fund	\$12,269	\$187,700
Total Contributions Received This Year:		\$572,914
Charitable Disbursements:		
General Fund:		\$210,295
Endowed Scholarship Funds:		
AAUW Second Chance	\$6,000	
Batterman Family	\$52,500	
Walter and Louise Buell	\$73,763	
Jason Dahmert Memorial	\$3,500	
Dr. James/Therese Fitzpatrick Educator	\$1,000	
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.	\$8,000	
James and Frances Luther	\$1,700	
Isabelle Matthews Education	\$2,000	
Pay It Forward	\$500	
Rose Inspire-a-Dream	\$2,000	
Dr. James Russell Athletic	\$3,513	
Ralph and Clara Rutledge Memorial	\$7,000	
Juanita Schreiner Memorial	\$11,725	
Maurice and Clara Staller	\$3,750	
Thrift Shop/ Jean Reich Memorial	\$2,000	
Dr. Sydney Weidemann	\$10,000	\$202,851
Donor-Advised Funds:		
Gordon Day Family	\$13,994	
Kerschensteiner Family Fund	\$10,770	
Negus Family Fund	\$2,000	
Schafer Family Fund	\$10,000	\$36,764
Field of Interest Funds:		
Beautification Fund	\$3,516	
Doris Highsmith Social Services Fund	\$3,000	
Mary C. Hoard Fund	\$444,500	
Bertha & Marilyn Kuhl	\$300,000	
Opportunities	\$1,447	
Pope Memorial Art Fund	\$1,075	
Phyllis & Bob Zeimen Fund	\$50,000	\$803,538
Scholarship Pass-Through Funds:		
Eagle Scout and Gold Award	\$750	
Ed Karrels Computer Science	\$9,000	
Luther Elementary School	\$500	
Jake Meinert Memorial	\$1,000	
Purdy Elementary School	\$1,000	
Rockwell Elementary School	\$500	\$12,750
Project Pass-Through Funds:		
Boys and Girls Club Fund	\$9,000	
Friends of Haumerson's Pond	\$15,211	
Friends of McCoy Park	\$424	
Project Lead	\$29,099	
Rock River Heritage Fund	\$1,071,319	\$1,125,052
Total Charitable Disbursements This Year:		\$2,391,251
Summary: Balance at July 1, 2014		\$23,910,419
Interest and Dividends	\$432,752	
Gain on Investments	\$143,546	
Contributions Received	\$572,914	\$1,149,212
Balance Before Expenses/Disbursements		\$25,059,631
Administrative Expenses	\$81,954	
Investment Management	\$116,972	
Charitable Disbursements	\$2,391,251	\$2,590,177
Balance at June 30, 2015		\$22,469,454

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 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 \$18 million in fulfillment of its mission.