



# Fort Atkinson Community Foundation

*"Where Gifts Today Build Better Tomorrows"*

**36<sup>th</sup> Anniversary Year – 1973-2009**

## ANNUAL FINANCIAL REPORT

Year ending June 30, 2009

All figures rounded to the nearest dollar

Dear Friends,

It has been a challenging year financially for individuals, businesses and foundations across the country and the Fort Atkinson Community Foundation is no exception. Investments suffered and the fund balance declined. However, even in these tough economic times, individuals and businesses have continued to donate to the Fort Atkinson Community Foundation. Thanks to your generous support, the Foundation Board determined to not put specific limits on grants funded this year but to look conservatively at requests and evaluate each grant application very carefully.

Using this philosophy, the Board of Directors kept amounts awarded from the various scholarship funds the same as in 2008. This year scholarship disbursements of \$209,285 were made to 83 Fort Atkinson area students.

June of 2008 saw the worst flooding ever recorded in Fort Atkinson. The Foundation quickly established a Flood Relief Fund with matching monies of up to \$50,000. Contributions came in from all over and \$92,740 was awarded by the Foundation in grants to help with flood damage.

In October 2008, the Fort Atkinson Community Foundation was able to truly support our purpose to enhance the quality of life in Fort Atkinson by pledging \$1,500,000 to the Dwight Foster Public Library's \$5,500,000 expansion and remodeling. This project has the ability to positively affect every citizen of Fort Atkinson. Other community groups we have supported this year in their projects to enhance the quality of life in Fort Atkinson include the Historic Preservation Commission, the School District of Fort Atkinson, the Fort Atkinson Arts Council, the Fort Atkinson Community Band, the Fort Atkinson Parks & Recreation Department, Project Lead, Friends of Lorine Niedecker, the Fort Atkinson Chamber of Commerce and the Boys & Girls Club.

The Fort Atkinson Community Foundation has updated its website, www.fort-foundation.org, to accept electronic donations. Now, in addition to mailing your tax deductible gifts to the Fort Atkinson Community Foundation at 244 N. Main Street, Fort Atkinson, WI 53538, you can make a secure, tax deductible contribution using a credit or debit card.

On a sad note, the Fort Atkinson Community Foundation lost an enthusiastic and tireless worker and supporter this year with the passing of Fred Rose. For years, Fred served as the webmaster for the Fort Atkinson Community Foundation website. He kept the community informed about the Foundation through his Fort Foundation Focus newspaper articles, beautiful photographs of Foundation's projects and informative power point presentations at various events. He also served as a member and chairman on the Advisory Council for the Boys & Girls Club, an important Fort Atkinson Community Foundation project. In addition, Fred and his wife Helen endowed the Fred & Helen Rose Inspire a Dream Scholarship. He will be missed.

Throughout this year, your continued generous support has enabled the Fort Atkinson Community Foundation to weather challenging financial times and continue our purpose of enhancing the quality of life in Fort Atkinson. A Thank-You Open House Reception is being planned for Sept, 20, 2009 from 4:00 to 7:00 pm at the Hoard Historical Museum. Please watch for your invitation.

On behalf of the board of directors and grant recipients, we thank you for your generosity and support.

Sincerely,

*Laurette Greenhalgh*

Laurette Greenhalgh  
President

**Present Board of Directors**

Laurette Greenhalgh    Randy Knox    J. Michael Phelps  
Jim Nelson    Ron Vogel

**FORT COMMUNITY FOUNDATION  
TOTAL DISBURSEMENTS**

Fiscal Year Ending 6/30	Disbursements
1995	176,856
1996	90,429
1997	141,442
1998	373,373
1999	156,384
2000	403,735
2001	323,514
2002	847,747
2003	543,472
2004	522,930
2005	437,162
2006	538,606
2007	1,758,408
2008	2,313,542
2009	1,032,147

***"Where Gifts Today  
Build Better Tomorrows."***

✂ Clip out & mail ✂

Yes, I would like to do my part to support the fine work of the Foundation.

Enclosed is my donation \$ \_\_\_\_\_  
to help us toward an even better community.

Signed \_\_\_\_\_

Address \_\_\_\_\_

**MAIL TO: Fort Atkinson Community Foundation  
244 N. Main St.  
Fort Atkinson, WI 53538**

<b>Assets at Beginning of Year</b>		<b>19,562,455</b>
General Account:		3,005,354
Scholarships:		
Second Chance Grant	118,424	
Band Booster	5,061	
Batterman Family Foundation	-1,773	
Walter & Louise Buell	1,323,449	
Jason Dahnert Memorial	35,252	
General Scholarship Fund	12,603	
Eileen Harrison Education	39,593	
Halker Scholarship	7,808	
Jerome Hake Engineering	84,530	
Ben & Ada Hake Agriculture	103,576	
Knapp Scholarship	11,188	
Knox A.A.U.W.	150,563	
James & Frances Luther	34,107	
Isabelle Mathews Education	40,981	
Pharmacy	3,053	
Purdy School Create a Dream	1,637	
Rose Inspire A Dream Scholarship	51,968	
Dr. James Russell	78,064	
Ralph & Clara Rutledge	147,254	
Don Schink	6,595	
Juanita Schreiner	267,708	
Maurice & Clara Staller	93,189	
Thrift Shop	26,262	
Sydney Weidemann	93,549	
Wiederhoeft Scholarship	29,497	2,764,140
Special Funds:		
Bark River Nature Park	2,104	
Barrie School Scholarship	500	
Beautification Council Project Fund	98	
Beautification Fund	275,369	
Boys & Girls Club	30,056	
Boys & Girls Club Investment Account	17,864	
Boys & Girls Club Rose Scholarship	1,500	
Gordon F. Day Family Fund	15,796	
Dwight Foster Library Building Fund	262,564	
Fire Department	125	
Hoard Museum Fund	34,810	
Kerschensteiner Family	273,234	
Doris Highsmith	153,580	
Mary C. Hoard	7,676,481	
Elizabeth Jones Chisholm	13,873	
Bertha & Marilyn Kuhl	1,930,851	
Carol Liddle	77,952	
Luther School Scholarship	561	
Negus Family	9,160	
Lorine Niedecker	4,127	
Operation Holiday Cheer	2,185	
Opportunities, Inc.	946	
Performing Arts	240	
Pope Memorial Art Fund	33,769	
Project Lead	7,304	
Purdy School Scholarship	1,602	
Schafer Family	91,425	
Senior Citizens Center	31,264	
Social Responsibility	4,045	
Theater Project	1,571	
Vance Family	21,620	
Water Tower Fund	3,451	10,980,028
<b>Total Fund Balance, June 30, 2008</b>		<b>16,749,522</b>
<b>Donations Received This Year</b>		
General Account:		18,721
Scholarships & Special Funds		
AAUW Second Chance	425	
Barrie School Scholarship	500	
Beautification Fund	308	
Bark River Nature Park	25	
Batterman Scholarship	60,000	
Boys & Girls Club	75,968	
Boys & Girls - Rose Scholarship	1,500	
Gordon F. Day Family Fund	500	
Dwight Foster Library Building Fund	262,739	
Flood Relief Fund	46,381	
General Scholarship Fund	3,256	
Eileen Harrison Scholarship	250	
Hoard Museum Fund	35,014	
Kerschensteiner Family Fund	200,600	
Knapp Scholarship	7,500	
Knox A.A.U.W. Scholarship	3,595	
Luther School Scholarship	561	
Negus Family Fund	1,100	
Operation Holiday Cheer	1,055	
Pope Memorial Art Fund	5,150	
Project Lead	7,345	
Purdy School Scholarship	1,600	
Purdy School - Create a Dream	510	
Rose Scholarship	57,772	
Russell Scholarship	90	
Schafer Family	23,000	
Schreiner Scholarship	150	
Thrift Shop Scholarship	1,000	
Vance Family	4,000	
Water Tower Fund	3,470	
Wiederhoeft Scholarship	27,030	832,395
<b>Total Contributions Received This Year</b>		<b>851,116</b>
<b>Charitable Disbursements:</b>		31,187
General Account:		
Scholarships & Special Funds		
Second Chance	2,000	
Batterman Family Scholarship	57,000	
Beautification Council Projects	117	
Beautification Fund	82,969	
Boys & Girls Club	83,500	
Buell Scholarship	76,000	
Dwight Foster Library	62,110	
Evergreen Cemetery	7,775	
Flood Relief Fund	46,654	
General Scholarship Fund	500	
Halker Scholarship	500	
Ben & Ida Hake Agriculture Scholarship	5,000	
Jerome Hake Engineering Scholarship	5,000	
Eileen Harrison Education Scholarship	4,000	
Doris Highsmith	9,960	
Mary Hoard Fund	326,494	
Hoard Museum Fund	1,183	
Kerschensteiner Family	10,000	
Knapp Scholarship	2,500	
Knox A.A.U.W.	10,000	
Kuhl Fund	75,771	
Carol Liddle Fund	34,175	
Luther Scholarship	2,500	
Negus Family Fund	25,000	
Nowodzelski Scholarship	128	
Operation Holiday Cheer	1,676	
Project Lead	7,067	
Railroad Corridor	1	
Dr. James Russell Scholarship	3,250	
Rutledge Scholarship	10,000	
Schafer Family fund	15,000	
Schreiner Scholarship	14,750	
Staller Scholarship	6,156	
Theatre Project	1,000	
Thrift Shop Scholarship	2,000	
Water Tower Fund	1,226	
Weidemann Scholarship	8,000	1,000,960
<b>Total Charitable Disbursements This Year</b>		<b>1,032,147</b>
<b>Summary: Balance at July 1, 2008</b>		<b>19,562,455</b>
Interest & Dividends	635,439	
Gain on Investments	-3,158,489	
Contributions Received	851,116	-1,671,934
Balance Before Expenses/Disbursements		17,890,521
Less Expenses	108,852	
Less Charitable Disbursement	1,032,147	1,140,999
<b>Balance at June 30, 2009</b>		<b>16,749,522</b>