



Fort Atkinson Community Foundation 2011-12 Annual Report



A new playground for Purdy School

**Where gifts today
build better tomorrows**

www.fortfoundation.org

Fostering Success for our Community

Dear Community,

The Board of Directors of the Fort Atkinson Community Foundation is pleased to present the foundation's fiscal year 2011-12 annual report.

Thanks to the ongoing generosity of our community, the foundation was able to disburse over \$1 million in support of our mission to enhance the quality of life in Fort Atkinson. The two largest gifts were payments toward our commitment to building projects by the Dwight Foster Public Library (\$375,000) and Rainbow Hospice (\$111,704). These two organizations had been awarded large challenge grants by the foundation – generous challenges which worked to encourage private donations and foster the success of both capital campaigns. Both of these worthy projects have now been completed and will provide valuable benefits to our citizens for many years to come.

Among the many smaller projects facilitated by foundation funds were the restoration of the historic 1901 Water Tower, the construction of a concession stand and restrooms at the Little League fields in Memorial Park, and installation



**2012 Buell Merit
Scholarship recipients**

of playground equipment at both Rockwell and Purdy schools, as well as a security camera system at the high school.

Of course, the foundation also works to



Dwight Foster Public Library Renovation

improve our community one student at a time with our extraordinary scholarship program. During the year we were pleased to fund 60 scholarships held by 53 undergraduate students, and another 20 scholarships retained by 17 graduate students — all of whom came from the Fort Atkinson area. The total amount paid in scholarships for these 70 students was a hefty \$195,543.

We are able to make these investments both in the fabric of our community and in our young people thanks to the many kind, generous, forward-thinking families who invest in the future of Fort Atkinson by giving to the Community Foundation. We are deeply grateful for your ongoing support.

Sincerely,
James J. Nelson, chairman

Help make Fort Atkinson even better.

Enclosed is my donation of \$ _____

Name: _____

Address: _____

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.

"I feel lucky to have grown up in Fort Atkinson."

Sarah Schmid, UW-Madison veterinary student and current recipient of a Buell Graduate Scholarship.

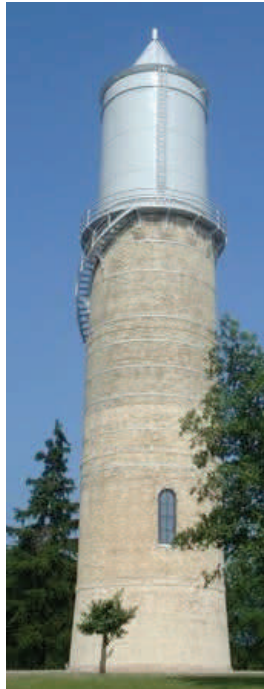
Dwight Foster Public Library Project



YOUR COMMUNITY FOUNDATION

The Fort Atkinson Community Foundation, which will celebrate its 40th anniversary next year, began in 1973 with a gift of \$25,000 from a local citizen who wanted to designate 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 first one, intending to enhance the quality of life in Fort Atkinson.

Managed by a volunteer five-member Board of Directors, the foundation continues to benefit from the thoughtful generosity of the community it serves.



1901 Water Tower restoration

BOARD OF DIRECTORS

Chairman
James J. Nelson

Vice Chairman
Ronald Vogel

Directors
Beth McLaughlin
W. Phil Niemeyer
Dean Brown

Past President
J. Michael Phelps

Secretary and legal
counsel
James Vance

Trustee representative
Rod Ellenbecker

Annual Financial Report, Year Ending June 30, 2012

Assets at Beginning of Year **\$19,749,671**

Assets as of June 30, 2012

General Account: 3,683,750

Scholarships:

| | |
|----------------------------|-----------|
| AAUW Second Chance | 139,676 |
| Band Booster | 6,606 |
| Batterman Family Fnd. | 13,573 |
| Walter & Louise Buell | 1,456,359 |
| Orrin & Margaret Bull | 4,757 |
| Jason Dahnert Memorial | 30,217 |
| General | 20,553 |
| Eileen Harrison Education | 45,577 |
| Gene Halker Memorial | 8,567 |
| Jerome Hake Engineering | 95,174 |
| Ben & Ada Hake Agriculture | 118,229 |
| Karrels Computer Science | 15,003 |
| Robert & Judith Knapp | 33,724 |
| Knox/AAUW | 184,597 |
| James & Frances Luther | 37,479 |
| Isabelle Mathews Education | 45,137 |
| Pharmacy | 3,985 |
| Purdy Create a Dream | 1,075 |
| Rose Inspire-a-Dream | 70,612 |
| Dr. James Russell | 90,541 |
| Ralph & Clara Rutledge | 160,313 |
| Juanita Schreiner | 305,762 |
| Maurice & Clara Staller | 105,425 |
| Thrift Shop & Jean Reich | 31,243 |
| Sydney Weidemann | 100,061 |
| Wiederhoeft Legacy | 51,148 |

Special Funds: 3,175,392

| | |
|-----------------------------|-----------|
| Bark River Nature Park | 2,910 |
| Barrie School Sch. | 2,048 |
| Beautification Council | 98 |
| Beautification Fund | 256,726 |
| Boys & Girls Club | 13,198 |
| Boys & Girls Club Inv. | 23,314 |
| Boys & Girls Club Rose Mem. | 2,006 |
| Gordon F. Day Family | 19,266 |
| Dwight Foster Library | 112,578 |
| Fire Department | 126 |
| Kerschensteiner Family | 359,687 |
| Doris Highsmith | 165,504 |
| Mary C. Hoard | 9,619,312 |
| Elizabeth Jones Chisholm | 23,421 |
| Bertha & Marilyn Kuhl | 1,813,530 |
| Carol Liddle | 52,530 |
| Luther School Sch. | 1,981 |
| Negus Family | 35,643 |
| Lorine Niedecker | 4,235 |
| Opportunities, Inc. | 1,234 |
| Performing Arts | 241 |
| Pope Memorial Art | 59,807 |
| Project Lead | 6,623 |
| Purdy School Sch. | 4,661 |
| Rock River Heritage | 4,251 |

| | |
|------------------------------------------|---------------------|
| Rockwell School Sch. | 1,500 |
| Schafer Family | 160,486 |
| Senior Citizens Center | 40,802 |
| Don Schink Memorial | 7,936 |
| Social Responsibility | 140 |
| Theater Project | 1,577 |
| Vance Family | 28,216 |
| Water Tower | 140 |
| Phyllis & Bob Zeiman | 262,960 |
| Total Fund Balance, June 30, 2012 | \$19,947,832 |

Charitable Disbursements:

| | |
|---------------------------------------|--------------------|
| General Account: | 166,091 |
| Scholarships & Special Funds | |
| Batterman Family Fnd. | 57,000 |
| Beautification Fund | 76,848 |
| Boys & Girls Club | 91,275 |
| Buell Scholarship | 71,850 |
| Orrin & Margaret Bull | 500 |
| Jason Dahnert Memorial | 3,500 |
| General | 500 |
| Gene Halker Memorial | 400 |
| Ben & Ada Hake Agriculture | 5,000 |
| Jerome Hake Engineering | 4,000 |
| Doris Highsmith | 11,680 |
| Mary C. Hoard | 376,100 |
| Robert & Judith Knapp | 2,500 |
| Knox/AAUW | 8,000 |
| Bertha & Marilyn Kuhl Fund | 42,108 |
| Carol Liddle Fund | 40,000 |
| James & Frances Luther | 1,700 |
| Project Lead | 2,762 |
| Purdy Create A Dream | 1,000 |
| Purdy School Sch. | 1,000 |
| Dr. James Russell | 3,813 |
| Ralph & Clara Rutledge | 7,500 |
| Schafer Family Fund | 22,000 |
| Don Schink Memorial | 1,050 |
| Juanita Schreiner | 15,530 |
| Second Chance | 5,000 |
| Maurice & Clara Staller | 3,000 |
| Thrift Shop & Jean Reich | 2,000 |
| Water Tower | 35,529 |
| Sydney Weidemann | 3,750 |
| Total Charitable Disbursements | \$1,062,985 |

Summary: Balance at July 1, 2011

| | |
|-------------------------------------|------------|
| Interest & Dividends | 426,883 |
| Gain on Investments | 383,881 |
| Contributions Received | 578,620 |
| Balance Before Expense/Disbursement | 1,389,384 |
| | 21,139,055 |

| | |
|---------------------------------|---------------------|
| Less Expenses | 128,238 |
| Less Charitable Disbursement | 1,062,98 |
| Balance at June 30, 2012 | \$19,947,832 |

JOIN US

The Fort Atkinson Community Foundation is a 501(c)3 organization. Your contribution is fully tax deductible to the extent allowed by law. Many methods of giving — such as appreciated securities or property — offer additional tax advantages.

To learn more about ways of giving, visit www.fortfoundation.org or contact Program Administrator Sue Hartwick at (920) 222-1191 or facf@fortfoundation.org.



New Rainbow Hospice Inpatient Facility

SUPPORT A FUND

Donations can be made to the General Fund or to any of the funds listed at left. Or establish your own fund in one of two ways:

Donor Advised Fund — This type of fund allows a donor to make recommendations to the board on projects they would like to support.

Special Donor Fund — This allows a donor to specify areas of interest for support, such as recreation, beautification, scholarships, or the arts, leaving the board to approve appropriate projects.

AND ACCEPT OUR THANKS