



# Fort Atkinson Community Foundation 2012-13 Annual Report

## Celebrating 40 Years of Giving

### 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).



*Renovation and Expansion of the  
Dwight Foster Public Library*

Dear Community,

The Board of Directors of the Fort Atkinson Community Foundation is pleased to present its 2012-13 fiscal year financial report.

Thanks to the ongoing generosity of our community, last year the foundation was able to disburse \$963,836 in support of our mission to enhance the quality of life in Fort Atkinson. While the two largest gifts were 'bricks and mortar' payments on our commitment to the Dwight Foster Public Library (\$375,000) and Rainbow Hospice (\$100,000), last year also featured a number of smaller grants given to local nonprofits such as the Community Dental Clinic, Family Promise, Jefferson County Literacy Council, and the local United Way chapter, to assist them with their work in strengthening the fabric of our social services network.

The foundation also worked to improve our community one student at a time with our remarkable scholarship program. During the year we were pleased to fund 66 scholarships held by 57 undergraduate students, and another 22 scholarships held by 19 graduate students – all from the Fort Atkinson area. The total amount paid on these 88 scholarships was \$199,522.



*Safe passage for  
Middle School students*

We were able to make these investments in the community and in our young people thanks to the many families who continue to invest in the future of Fort Atkinson by giving to the Community Foundation. Last year



*Our 2013 Buell Merit Scholarship recipients—  
thanks to a generous fund established by  
Walter and Louise Buell*

we received 457 separate donations, ranging from gifts of \$3 to \$63,000, for a total contribution of \$502,882.

All gifts received were spent or invested as directed by our donors. One of the great benefits of the foundation is that we can fulfill our donor's charitable wishes well into the future when they are no longer here to do it themselves. I think Ernie Pope would be very pleased to see his fund supporting the prizes for the art show at Cygnus, and Mary Hoard would be thrilled to see what gifts from her fund have done for the library. This is the foundation at its best.

Thanks to our donors, the Community Foundation is able to make special things happen here in Fort Atkinson. Working together, we make a difference.

Sincerely,  
Ronald J. Vogel, chairman

*"The older I get, the more blown away I am by the unique support given to Fort graduates and residents to further their education."*

Mariah Erdman, Baruch College  
MBA student and recipient  
of a Walter & Louise Buell  
Graduate Scholarship

### Where gifts today build better tomorrows

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

## YOUR COMMUNITY FOUNDATION

The Fort Atkinson Community Foundation began in 1973 with a gift of \$25,000 from an anonymous local citizen who wanted the money 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 intended to enhance the quality of life in Fort Atkinson.

Carefully managed by a volunteer Board of Directors, the foundation continues to benefit from the thoughtful generosity of the community it serves.



*Digital x-ray plates for the Community Dental Clinic*

### BOARD OF DIRECTORS

Ronald J. Vogel, chairman  
Elizabeth McLaughlin, vice-chairman  
W. Phil Niemeyer  
Dean Brown  
Christopher Rogers  
James J. Nelson, past chairman

## Annual Financial Report, Year Ending June 30, 2013

[figures rounded to nearest dollar]

### Assets as of June 30, 2013

<b>General Account:</b>		3,921,473	
<b>Scholarships:</b>			
AAUW Second Chance	153,189		
Band Booster	7,292		
Batterman Family Fnd.	21,383		
Walter & Louise Buell	1,532,746		
Orrin & Margaret Bull	4,718		
Jason Dahnert Memorial	31,595		
James/Therese Fitzpatrick	12,114		
Ben & Ada Hake Agriculture	126,377		
Jerome Hake Engineering	101,038		
Gene Halker Memorial	9,031		
Eileen Harrison Education	48,182		
Jones Dairy Farm Tech Ed	52,721		
Robert & Judith Knapp	42,550		
Knox/AAUW	199,199		
James & Frances Luther	39,663		
Isabelle Mathews Education	45,680		
Pay It Forward	24,279		
Pharmacy	4,399		
Rose Inspire-a-Dream	79,881		
Dr. James Russell	100,165		
Ralph & Clara Rutledge	168,980		
Juanita Schreiner	328,971		
Maurice & Clara Staller	113,312		
Thrift Shop & Jean Reich	33,475		
Sydney Weidemann	106,538		
Wiederhoeft Legacy	55,399	3,442,878	
<b>Field of Interest Funds:</b>			
Bark River Nature Park	3,263		
Beautification Fund	283,526		
Boys & Girls Club Inv.	25,738		
Doris Highsmith	165,449		
Mary C. Hoard	10,215,210		
Elizabeth Jones Chisholm	32,777		
Bertha & Marilyn Kuhl	2,053,417		
Carol Liddle	57,992		
Lorine Niedecker	4,675		
Opportunities, Inc.	1,362		
Pope Memorial Art	64,976		
Senior Citizens Center	45,045		
Phyllis & Bob Zeiman	290,303	13,243,733	
<b>Donor-Advised Funds</b>			
Gordon F. Day Family	21,320		
Kerschensteiner Family	397,088		
Negus Family	98,579		
Schafer Family	197,335		
Vance Family	31,150	745,472	
<b>Pass-through Funds</b>			
Barrie School Sch.	3,049		
Boys & Girls Club	15,046		
Boys & Girls Club Rose	1,076		
Dwight Foster Library	46,566		
Eagle Scout/Gold Award	1,500		
Fire Department	126		
Friends of Haumerson's	12,825		
Friends of McCoy Park	600		
Karrels Computer Science	24,009		
Luther School Sch.	1,982		

Jake Meinert Memorial	5,234		
Performing Arts	242		
Project Lead	44,454		
Purdy School Sch.	7,911		
Rock River Heritage	37,083		
Rockwell School Sch.	2,501		
Don Schink Memorial	2,793		
Theater Project	1,578		
Water Tower	575	209,150	
<b>Total Fund Balance, June 30, 2013</b>		<b>\$21,562,705</b>	
<b>Charitable Disbursements:</b>			
<b>General Account:</b>		155,931	
<b>Scholarships &amp; Special Funds</b>			
AAUW Second Chance	2,500		
Batterman Family Fnd.	58,500		
Boys & Girls Club	67,587		
Boys & Girls Club Rose Mem.	1,181		
Buell Scholarship	73,472		
Orrin & Margaret Bull	500		
Jason Dahnert Memorial	1,750		
Dwight Foster Library	112,630		
Ben & Ada Hake Agriculture	4,000		
Jerome Hake Engineering	4,000		
Gene Halker Memorial	400		
Eileen Harrison Education	2,000		
Doris Highsmith	17,000		
Mary C. Hoard	380,000		
Karrels Computer Science	2,000		
Robert & Judith Knapp	2,500		
Knox/AAUW	8,600		
James & Frances Luther	1,700		
Isabelle Mathews Education	4,000		
Negus Family	5,000		
Pay It Forward	500		
Pope Memorial Art	1,050		
Project Lead	70		
Purdy School Sch.	1,112		
Rock River Heritage	18,700		
Dr. James Russell	4,437		
Ralph & Clara Rutledge	7,500		
Don Schink Memorial	5,166		
Juanita Schreiner	10,300		
Maurice & Clara Staller	3,000		
Thrift Shop & Jean Reich	2,000		
Sydney Weidemann	3,750		
Ardell Wiederhoeft Legacy	1,000	807,905	
<b>Total Charitable Disbursements</b>		<b>\$963,836</b>	
<b>Summary: Balance at July 1, 2012</b>		<b>\$19,947,832</b>	
Interest & Dividends	489,931		
Gain on Investments	1,724,805		
Contributions Received	502,882	2,717,618	
Balance Before Expense/Disbursement		22,665,450	
Less Expenses	138,909		
Less Charitable Disbursement	963,836	1,102,745	
<b>Balance at June 30, 2013</b>		<b>\$21,562,705</b>	

## BENEFITS OF GIVING

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

**Simplicity** — One gift can benefit a number of charitable organizations you may wish to support.

**Perpetuity** — Unlike a gift or bequest to an organization that may or may not survive in the future, you can be assured that your gift to the foundation will continue to provide the benefits you intended for your community.



*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** — Allows a donor to make recommendations to the Board on projects they would like to support.

**Field of Interest Fund** — Allows a donor to specify areas of interest, such as the arts, recreation, beautification, scholarships, or social services, leaving the Board to choose appropriate projects.

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