



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.

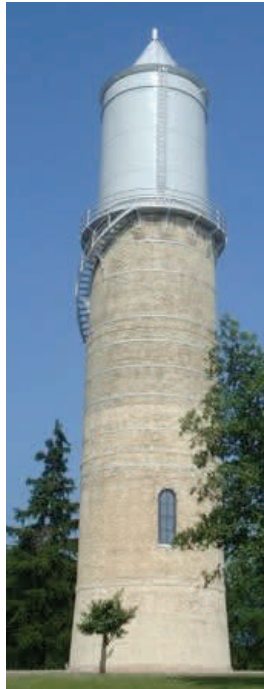
Dwight Foster Public Library Project



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

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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
	<u>13,088,690</u>
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
	<u>896,894</u>
Total Charitable Disbursements	\$1,062,985

Summary: Balance at July 1, 2011 **\$19,749,671**

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

Less Expenses	128,238
Less Charitable Disbursement	1,062,98
	<u>1,191,223</u>
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