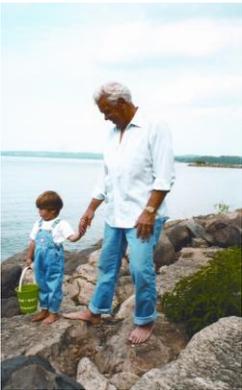


The Fond du Lac Area Foundation

2014-2015 Report To The Community



The Foundation Celebrates 40 Years



In 1975, Fond du Lac Area Foundation visionary and founding father, Carl Tonjes, worked with his good friend, Allan Edgarton to create the Fond du Lac Area Foundation and brought forward the idea and importance of a lasting community endowment. Many of Carl's friends told him that if people give to you, you in turn have to give it all away. Carl stayed true to his belief in endowment and made believers out of everyone about what the power of endowment can do. Carl Tonjes credits the Children's Home with making the Fond du Lac Area Foundation a reality when it disbanded and had the good faith to give \$50,000 to use to establish the first Foundation fund, our Community Fund.

The Founding Board of Directors included Carl Tonjes, Allan Edgarton, Marian Petri, Bernie Schreiner, Ellen Humleker, George Becker, and Charles Ludden with the dream of a community foundation where citizens could contribute for the present and make bequests for the future for funds that would live on. Their goal was to set aside a portion of each generations acquired wealth for the next generation. That goal of the Foundation, then, continues to mirror what the Foundation strives to do today. The mission of the Foundation is *"Creating a better community by promoting philanthropy, awarding effective grants, and providing leadership on important community issues....today & forever."*



In the last 40 years the Foundation has continued to follow Carl's blueprint and has created a thriving community endowment. From that first year with an initial gift of \$50,000 for our first fund and the first grant of \$350, the Foundation has grown to 314 Charitable Funds all created by people just like all of you. Our funds currently have a market value of over \$30.7 million dollars which has allowed the Foundation to grant out over \$15.1 million dollars in charitable dollars back to our wonderful Fond du Lac community. The Foundation through the years has not only supported our local nonprofits in the community, but has also helped to create and enhance them and the community as a whole. The Foundation has done many of these things quietly and few people in the community know of the extent of the role that the Foundation has played. This is an opportunity to share some of these major accomplishments that the Foundation has played a role in through our 40 years.

Foundation Historic Accomplishments

- In 1989, the Foundation provided \$47,500 to the YMCA Board to purchase the land on Second Street where they are currently located
- In 1993, Sandi Roehrig worked on a project to try to put together an entity that could coordinate and support arts and culture activities in the community. Sandi also wrote for and received a grant from the WI Arts Board to assist in that project. Those efforts resulted in the formation of the FDL Arts Council.
- In 1998, a grant was made by the Foundation to start the FDL County Volunteer Center.
- In the years 2000 and 2001, the largest grants ever were awarded by the Foundation... \$500,000 to support the Fond du Lac Performing Arts Center and \$400,000 to the Windhover Center for the Arts. A portion of the money was for the building projects and also to establish endowment funds for each organization to help ensure those organizations had funds to use for future operations.
- The Foundation worked with a group of women and helped to create the HOPE Network to study the needs of women in our community and the services available for them. Out of the HOPE Network came the recommendation for the HOPE Mentoring Program and a Woman's Fund.
- In 2004, the Women's Fund was established, largely spearheaded by four local women.
- In 2004, the Foundation partnered with the FDL Reporter to support the first Cheers for Volunteers Dinner to honor community volunteers and to provide some financial support and visibility for the FDL County Volunteer Center.
- In 2005, a Foundation grant supported a feasibility study for the proposed partnership between the FDL Family YMCA and the Boys and Girls Club. The Foundation later awarded a multi-year grant of more than \$300,000 to support this innovative and successful project.
- Also in 2005, grants were awarded to support the start-up of the Community Education Opportunities program and the New Beginnings Pregnancy Care Center.
- In 2008, the Fond du Lac area was devastated by a flood. Members of the Foundation staff and board were part of a community group that convened to help create a disaster relief group. A fund was created at the Foundation to help benefit people that lost a great deal.
- In 2008, the Foundation partnered with the Reporter to publish the first Scholarship Resource Guide under the direction of Sue Steinbarth.
- Also in 2009, the Foundation awarded a grant of \$30,000 to support the development of a Downtown Comprehensive Plan.
- In 2012, the Foundation worked with the Sterr Family and the Lee and Laretta Sterr Fund provided funding to Loop a portion of the Fond du Lac PAC to allow hearing impaired people the opportunity to hear plays and performances there more clearly.
- In 2012, the Foundation approves a \$30,000 grant to the Solutions Center to help to purchase a home for families to stay together and \$250,000 to help the Children's Museum with their relocation to the Scott Street site.
- In 2013, the Foundation board approved the funding of \$125,000 to support the Windhover Center for the Arts renovation project now known as THELMA. The Foundation also approved a \$35,000 grant for the FDL Humane Society addition.
- The last few years the Foundation has been involved in the creation of a number of 'community focused funds.' Some of the exciting new funds are for Downtown Fond du Lac, The Fond du Lac Bike Loop, The Holiday Light Show at Lakeside Park, The Lakeside Park Enhancement, and the City of Fond du Lac Park flowers.

What We Do

What's your passion? From churches, neighborhood and educational organizations to children's health, animal welfare, fine arts, and the environment, there is no shortage of causes to support in our community. Making a legacy gift is an opportunity to reflect on your values and passions. Perhaps there is a cause you have felt strongly about through the years, or a local organization that has helped you or a loved one in a time of need. Whatever your inspiration for giving, your legacy gift is an enduring testament to the causes you hold dear.

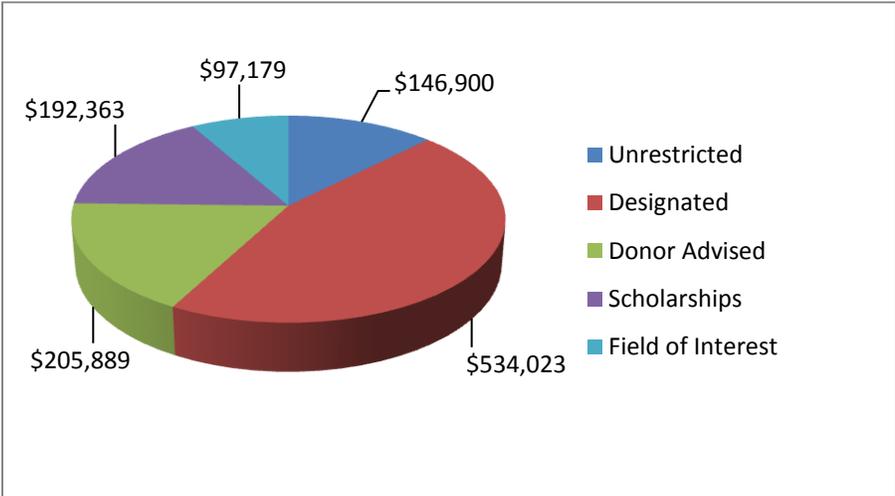
You can become a member of the Legacy Society whether you are a current donor to the Fond du Lac Area Foundation or if you are new to us. Those who plan to remember the Foundation through a will, trust, designation, beneficiary of a life insurance policy or IRA, or other planned gift are invited to join our Legacy Society. Too often, these gifts are unrecognized because they come at the end of donors' lives. The Legacy Society provides a way to recognize and thank donors during their lifetimes and allow them to meet others who have done the same.

An endowment fund can support the charity or charities you currently give to, it can also support a field of interest (Youth, poor and needy, arts, elderly, scholarship, etc), or you can create a fund that is unrestricted. Unrestricted Funds are granted at the discretion of the Fond du Lac Area Foundation's Board of Directors who determine where the most needs are in the community. These endowment funds offer great flexibility in meeting existing and future needs in the community. Endowments are permanent funds in which the principal is preserved and invested, and a percentage of the earnings are then distributed to support charitable works in perpetuity. Just as Albert Einstein once called compounded interest "the most powerful force in the universe," endowments carry an inherent power to provide for community needs through continued growth. Over time, the distributions exceed the original gift, while the fund balance continues to grow.

The Fond du Lac Area Foundation is dedicated to helping people just like you achieve your charitable dreams. Your planned gift will allow you to help your community, support your favorite causes and allow your family name to live on forever. Contact us to find out how to create your own lasting legacy.

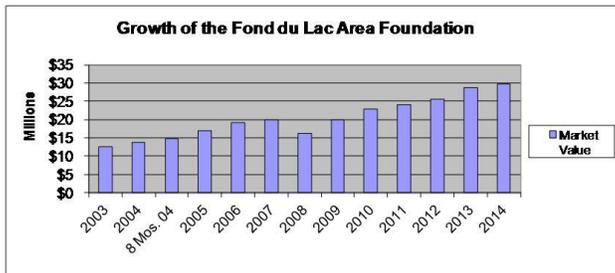
Building A Strong Community

Since the Fond du Lac Area Foundation was formed it has now invested more than \$15 million back into the community in the form of grants. These grants have helped to make our community a better place to live, work and grow. These grants address needs ranging from Social Services, Health, the Arts, the Environment, Education, Leadership, other non-profit organizations, and various emerging needs that have come up over time. In 2014, the Foundation awarded grants to more than 50 organizations for more \$1,175,000.



FOND DU LAC AREA FOUNDATION
STATEMENT OF REVENUE AND EXPENSES

	2013	2014
Income		
Additions to Funds	992,602	1,581,207
Investment Income (Loss)	423,277	371,516
Income (loss) on investments	3,020,858	645,532
Other Income	<u>38,758</u>	<u>16,606</u>
Total Revenue and Support	4,475,495	2,614,861
Grants and Expenses		
Grants	897,369	1,176,354
Administrative Expenses	344,496	380,554
Program Related Expenses	12,094	
Other Disbursements	<u>11,412</u>	<u>11,413</u>
Total Disbursements	1,265,370	1,568,320
Change in Net Assets	3,210,125	1,046,541
Net Assets - Beginning	24,585,442	27,795,567
Net Assets - Ending	<u>27,795,567</u>	<u>28,842,109</u>
Supporting Organization - Sophia Foundation, Inc.	1,031,703	967,893
Total Net Assets	<u>28,827,270</u>	<u>29,810,002</u>



Auditors: Huberty CPAs & Trusted Advisors
Trustees: US Bank and National Exchange Bank & Trust
This is a summarized financial statement. The complete audited financial statements and IRS Form 990/990T are available upon request. A reproduction fee may be assessed.

The Fond du Lac Area Foundation is governed by a 14-member volunteer board of directors who each are eligible to serve three three-year terms. Current Board Members serving as volunteers to the Fond du Lac Area Foundation are Stephen M. Cramer, Steven J. Dilling, Stephen L. Franke, Thomas A. Herre, Carol B. Hyland, Therese Massey, Patricia A. Miller, Steven G. Millin, Stephen M. Peterson, Paul W. Rosenfeldt, Aaron A. Sadoff, Jack E. Twohig, Karen A. Wuest and Scott I. Wittchow.

Foundation Staff: Executive Director: Sandi Roehrig, Scholarship Director and Executive Assistant: Sue Steinbarth, Director of Finance & Development: Joe Braun, and Administrative Assistant Jenny Zacherl have a combined 63 years of community foundation service experience to help serve our valued donors.

You've heard stories about how we have carried about the charitable dreams of those who have trusted us to do so. For these past 40 years, the Foundation has stayed true to the mission to help the generous people of our community create their own personal legacies to better the future of our community. We have helped people be able to "look down from above, SMILE with satisfaction, and say, "I did that...my existence did make a difference. I did leave the world a better place." -Sandi Roehrig, Executive Director, Fond du Lac Area Foundation

Fond du Lac Area Foundation
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See us at www.fdlareafoundation.com and Like us on Facebook

Ph: 920-921-2215

Leave a legacy: Include the Fond du Lac Area Foundation in your will or estate plan



Confirmed in Compliance with National Standards for U.S. Community Foundations