

# Fond du Lac Area Foundation

## *Report to the Community*

At this year's Celebration of Giving, I could not help but look around the room and think how fortunate we are to live in Fond du Lac. Why? Because Fond du Lac is such a great and giving community. People taking time out of their busy schedules to spend an evening with the Foundation to recognize and honor gracious people and the great things they do in our community.

The mission of the Fond du Lac Area Foundation dictates that we exist to create a better community. Imagine having a goal to create a better community. I truly consider myself lucky to work with people, like all of you, who are as committed to the betterment of Fond du Lac as our Foundation staff and board of directors are. The Foundation is honored to meet and work with each of you to learn about the amazing things in our community that you might like to do...if you knew you could. Each of you has the power to make an impact in your community, and the Foundation is honored to be your partner. The ability to work with generous people that want to leave a lasting legacy is truly a blessing every day.

As time moves forward, the Fond du Lac Area Foundation will continue to follow its mission of creating a better community by promoting philanthropy, awarding effective grants, and providing leadership on important community issues...today and forever. We are fortunate to live in a community of philanthropists, volunteers, change makers, and participants. Thank you for allowing us to continue to connect people who care with causes that matter.

In partnership,

Joe Braun, Executive Director

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## Introducing: A Fresh Look



Fond du Lac Area  
**FOUNDATION**

We are proud to announce the launch of our new logo!

The Fond du Lac Area Foundation has long been identified by our generational photo of a grandfather and his grandchild. While that photo will forever remain a part of the Foundation, the time has come to refresh our brand. Our new logo is representative of who we are, what we do, and our belief that it takes many hands to do good work.

The tree is a symbol of life, prosperity, and strength; with strong roots, growth will follow. The leaves are a collection of hands in varying colors. This represents the diversity of the Foundation's donors, funds, and grantees who are all intertwined.

Today and forever, the Fond du Lac Area Foundation will be deeply rooted in the best interests of our community.

*Through a charitable fund with the Fond du Lac Area Foundation, donors are empowered to provide grants to the causes they care about . . . now and forever!*

## Legacy Award Recipients



*Donna & Joel Klanderaman*



*Bernie & Kathy Jones Family  
Travis, Brian & Jeff Jones*

In 2005, the Fond du Lac Area Foundation established the “Legacy Awards” to honor those individuals, couples, families, and businesses which have significantly impacted the quality of life in the Fond du Lac area through outstanding community-orientated philanthropy. This year, at the annual Celebration of Giving, we were proud to present awards to two families who exemplify the value of our work.

**Donna and Joel Klanderaman** established the Klanderaman Memorial Scholarship Fund in 1999, then created the Joel D. Klanderaman and Donna M. Renderman Klanderaman Family Fund in 2018. The family of **Bernie and Kathy Jones** established the Bernie Jones Memorial Scholarship Fund in 1994, then created the Kathy and Bernie Jones Fund in 2019.

To cap off the evening, the names of all Celebration of Giving attendees were included in a grant drawing. The winner—J.J. Raflik—was able to select a charity of his choice to receive a \$500 grant.

## Making a Difference Through Planned Giving

### The Legacy Society

You can become a member of the Legacy Society whether you are a new or current donor to the Fond du Lac Area Foundation. Those who plan to remember the Foundation through a bequest are invited to join our legacy society. The Legacy Society provides a way to recognize and thank donors during their lifetimes and allows them to meet others who have done the same.

*Join the legacy society in one of the following ways:*

- ◆ Include the Fond du Lac Area Foundation in your will or estate plan.
- ◆ Designate the Fond du Lac Area Foundation as a beneficiary of an IRA or other retirement plan.
- ◆ Name the Fond du Lac Area Foundation as the owner or beneficiary of a life insurance policy.
- ◆ Designate the Foundation as a charitable distribution from a lead or remainder trust.

## Fond du Lac Area Foundation

### Fund Types

The Fond du Lac Area Foundation offers simple, flexible, and rewarding ways to fulfill philanthropic goals - whether you are giving \$100 or \$100,000.

#### Donor-Advised

Donors personally recommend grants to support nonprofit organizations and projects.

#### Designated

Donors choose one or more specific nonprofit organizations to support.

#### Field of Interest

Donors support a general cause rather than a specific charity.

#### Unrestricted

Grants are determined by the Board of Directors based on the needs within the community.

#### Scholarship

Donors provide scholarships for high school graduates.

# Fond du Lac Area Foundation

## 2018 Financial Review

406

Grants Awarded

176

Scholarships Awarded

\$1.5

Million Granted

370

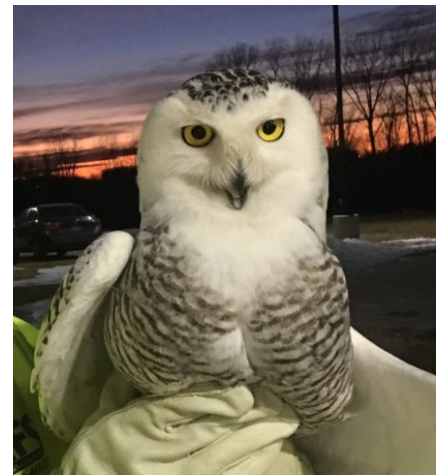
Funds

## Helping Your Fund Take Flight

What are you passionate about in your life? Often times donors don't realize what they have the power to do charitably, including supporting areas of interests in their everyday lives. For one of the Fond du Lac Area Foundation's donors, they derive passion and interest from supporting the security of the **snowy owl population** through one of the world's largest collaborative research projects.

On Feb. 21, 2018, a juvenile female snowy owl was trapped at Green Bay's Austin Straubel International Airport, tagged, and safely relocated to the Buena Vista grasslands of central Wisconsin. Her transmitter—which allows a volunteer team of scientists, banders, and wildlife veterinarians to track her movements—*was underwritten by an anonymous grant to the Fond du Lac Audubon Society from a donor-advised fund at the Fond du Lac Area Foundation.*

Straubel's **solar-powered transmitter** records locations in three dimensions (latitude, longitude, and altitude) at programmable intervals, providing unmatched detail on her movements. This information provides researchers with the local and landscape-level movements of snowy owls on the wintering grounds, as well as their nocturnal hunting activity and range size.



*Straubel, named in honor of her rescue location  
— Austin Straubel International Airport.*

## Thanks to our benefactors . . .

*. . . donor-directed funds made the following projects possible in 2018!*

Training and  
equipment for  
paramedics to join  
the SWAT team

A seeing  
eye dog  
program

Enhancements to a  
high school theater  
department

Lights at a  
community  
baseball field

An aspiring  
entrepreneurs  
program at a local  
high school

# Fond du Lac Area Foundation

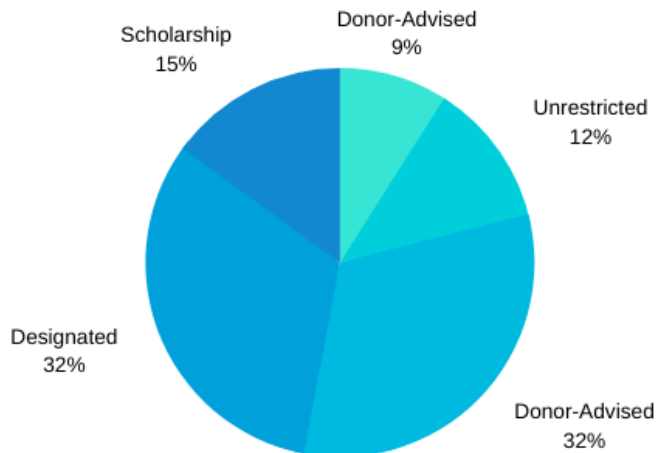
## 2018 Statement of Revenue and Expenses

<b>Income</b>	<b>2017</b>	<b>2018</b>
Additional to Funds	2,505,508	1,761,116
Investment Income (loss)	485,363	787,657
Income (loss) on Investments	4,317,561	-2,643,442
Other Income	<u>19,208</u>	<u>19,793</u>
<b>Total Revenue &amp; Support</b>	<b>7,327,640</b>	<b>7,327,640</b>
<b>Grants &amp; Expenses</b>		
Grants	1,534,201	1,486,648
Administrative Expenses	427,937	476,790
Program Related Expenses	0	0
Other Disbursements	<u>11,450</u>	<u>11,450</u>
<b>Total Disbursements</b>	<b>1,973,588</b>	<b>1,974,888</b>
Change in Net Assets	5,354,052	-2,042,817
Net Assets- Beginning	33,779,803	39,133,855
Net Assets- Ending	<u>39,133,855</u>	<u>38,080,345</u>
Supporting Organization <i>Sophia Foundation, Inc.</i>	932,211	839,031
<b>Total Net Assets</b>	<b><u>40,066,066</u></b>	<b><u>38,919,376</u></b>

<b>Board of Directors</b>	
Steven Dilling, Chairman	
Thomas Gross, Vice Chairman	
Aaron Sadoff, Treasurer	
Carol Hyland, Secretary	
Tripp Ahern	
Dawn Colwin	
David Hornung	
Therese Massey	
Loree Shady	
Paul Rosenfeldt	
Karen Wuest	
<b>Foundation Staff</b>	
Joe Braun	
<i>Executive Director</i>	
Molly Jaster	
<i>Marketing &amp; Communications Manager</i>	
Erin Mueller	
<i>Business Manager</i>	
Sandi Roehrig	
<i>Advisor to the Executive Director</i>	
Jenny Zacherl	
<i>Grants &amp; Donor Relations Associate</i>	

### 2018 Grants by Fund Type

Unrestricted	\$175,138
Designated	\$474,945
Scholarship	\$1231,062
Donor-Advised	\$475,940
Field of Interest	\$141,082



Auditors: Huberty CPAs & Trusted Advisors

Trustees: U.S. 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.*