

FOND DU LAC AREA FOUNDATION

Report

TO THE COMMUNITY



Fond du Lac Area
FOUNDATION

Featured Stories

Legacy Giving: Harold L. Sabel Fund

Corporate Giving: Society Insurance Charitable Fund

A Message from the Executive Director

Dear friends,

What an interesting and contrasting year we've had. Through it all, the Foundation has continued to be a great resource for our donors, our valued nonprofits, and the Fond du Lac Community as a whole. We are so lucky to have such a dedicated donor base that puts their faith in us to be excellent stewards of their donated dollars. We are grateful to utilize our experience and knowledgeable board of directors to direct valuable dollars that support not only the needs in our community and also the strengths in the Fond du Lac Area.

In the last year, we have experienced some very exciting times thanks to you, our valued friends. The Foundation provided the Fond du Lac area with over 400 grants and over \$1.4M in resources. We were also honored to provide over \$225,000 in scholarships to local high school and college students. Donors started more than 25 new funds with the Fond du Lac Area Foundation which brings our total funds to now over 380! It is our privilege to work with all of you to create a lasting legacy in your family or business name that will live on forever.

In May of 2019, we began meeting with a few passionate individuals who displayed an ambition to support the Beaver Dam area through a community foundation. By September of 2019, we finalized an agreement to form the Beaver Dam Area Community Foundation as our first regional affiliate. We are blessed to have them as part of our philanthropic family.

Our thoughts go out to all of you during these unprecedented times that our world has endured. I believe that we have all been touched in some way by the COVID-19 virus and the repercussions which have affected our everyday lives. Whether it is individuals, families, businesses, or nonprofits, everyone was impacted in some way.

The Foundation received overwhelming requests from the community to create a COVID-19 Relief Fund, so we made it happen. That push sparked two generous matching gifts from Jo Ann Ward and Society Insurance that leveraged many more gifts. It was truly amazing. I am continually astonished by the supportive and giving community that I am honored to be a part of. The Fond du Lac community is truly a place that supports and cares. Your community foundation is here with you, every step of the way, today and forever.

Joseph J. Braun, Executive Director

P.S. Our new logo was introduced in fall 2019. The logo is made up of multiple colorful hands that are deeply rooted in community.



Our Team

2019 was a year of growth and achievement. **Joseph Braun** completed his first year as Executive Director. **Jenny Zacherl** completed her 13th year of service to the organization. **Erin Mueller** expanded her role to earn the title of Business Manager and Scholarship Director. **Molly Jaster** was hired as the Marketing and Communications Manager. **Kayla Schumacher** was hired in the newly created position of Donor Relations Manager.



First Grant Contest

We held the 1st annual **Fond du Lac Area Foundation Grant Contest** in December 2019. This nomination-based contest awarded a \$500 grant to Fond du Lac Rugby Inc. to help keep player fees low so all families have the ability to participate.

Pictured: Joe Braun and Coach Ben

Partnership with Fondy 100 Gives

July 2020 marks the 3-year anniversary of **Fondy 100 Gives**. To date, the group of 100 community-minded members have personally invested \$400 each per year and granted **\$105,000** to **12** nonprofit organizations. Grant funding has benefited: Camp to Belong, Children's Museum of Fond du Lac, Salute the Troops, Family Resource Center, Treffert Center, YMCA-Youth in Government, Women's Empowerment Series, Fish for Kids, Sabish Elf Project, Fondy Cares, James House Ministry, and Marsh Haven Nature Center.



January 2020 grantee: James House Ministry

L to R: J.J. Rafflik, Dr. Tammy Boudry, Timothy Bachleitner, Travis Worth, Joe Braun

Our First Regional Affiliate

The **Beaver Dam Area Community Foundation** was established as a regional affiliate less than one year ago (September 2019) and has already successfully facilitated their first grant cycle, administering over \$16,000 to nonprofit agencies located in Dodge County.

Through the diligent efforts of the advisory board and the generous communities in Dodge County, 20 charitable funds and over \$150,000 has already been raised. These funds have been created by individuals, families, businesses, and agencies. The **Beaver Dam Area Community Foundation** is well on its way to becoming a household name. They are dedicated to not only serving the needs of Dodge County, but also enhancing its many strengths.

In fall 2020, the **Beaver Dam Area Community Foundation** will present their second grant cycle.

The **Beaver Dam Area Community Foundation's** advisory board is currently chaired by President Tom Heffron and Vice President Patrick Lutz.

 BEAVER DAM Area Community FOUNDATION	17	\$150k
	Advisory Members	Assets
	20	\$1m
	Current Funds	3-Year Asset Goal

Society Insurance's Commitment to Corporate Giving

Being an outstanding corporate citizen is one of the core company goals at Society Insurance. That's why in 2006 they established the **Society Insurance Charitable Fund** at the Fond du Lac Area Foundation.

For Society Insurance, the cumulative impact of their non-endowed donor advised fund is gratifying. Since 2006, the **Society Insurance Charitable Fund** has directed over \$1 million to those in need in Fond du Lac County. The organization sees the value in persistent giving - both as a way to engage their employees and as an avenue to support the greatest needs in Fond du Lac.

Society Insurance is striding down a well-paved path; making a difference to causes that are important to their employees and that will meet the approval of their customers. The **Society Insurance Charitable Fund** is managed with the belief that staying consistent and building on what the organization has done in the past will maximize the difference.

Employees of Society Insurance share the same passion for community as their employer. The employees crave being a part of an organization that is committed to the community and want to make a difference. This is where the partnership between the **Society Insurance Charitable Fund** and the Fond du Lac Area Foundation becomes beneficial. Through collaboration, the Foundation enables Society Insurance to touch the many areas that are important to the organization and their employees.

For fourteen years, the **Society Insurance Charitable Fund** has supported a variety of industries and initiatives, including women and children, education, health and wellness, law enforcement, community events and festivals, music programs, and more.

"When it comes to the **Society Insurance Charitable Fund**, our top priority is to help in satisfying basic human needs. With that as a base going on to support causes that can enable people to be all that they can be is a natural extension. When possible, we go beyond that to supporting causes that elevate the quality of life in the community. We have a strong connection to Fond du Lac and want to continue to see it succeed," stated Amy Collett, VP Human Resources & Administration.

*Pictured: Rick Parks, CEO of Society Insurance, presenting a \$32,560 check from the **Society Insurance Charitable Fund** to Patti Habeck of Feeding America Eastern Wisconsin. The employees had a hand in choosing the organization their COVID-19 relief campaign would support and then proceeded to donate \$16,280 from their own pockets. Society added a dollar-for-dollar match. According to Liz Wollenberg, Donor Relations Manager for Feeding America Eastern Wisconsin, the donation will provide almost 100,000 meals for local families with food insecurity.*



Corporate Giving

Whether your business is just beginning to consider how to give or you're already operating a corporate foundation, the Fond du Lac Area Foundation can help further your philanthropic mission. We can streamline your charitable giving through a donor-advised fund and administer your grant making program. We will eliminate your need to utilize staff to do the work that we specialize in. Our community knowledge and charitable giving expertise can help you meet your corporate giving goals, promote your company or family's philanthropic passions and make a positive impact in your community. To learn more, visit www.fdlareafoundation.com or call Joe Braun at (920) 921-2215.

A Paw-feet Example of Planned Giving

Harold Sabel was employed with the Soo Line Railroad for 40 years and owned and operated Sabel's Mobile Home Park and Tavern in Fond du Lac. Harold lived a quiet life and was known as a kind and generous man. His giving heart led him to the Fond du Lac Area Foundation to discuss planned giving options.

Since his passing in 2015, the **Harold L. Sabel Fund** has provided annual grants to nonprofit organizations he was passionate about, including the Fond du Lac Humane Society.

How do grants from the **Harold L. Sabel Fund** positively impact the organization? The Fond du Lac Humane Society welcomes over 1,000 animals per year, including cats, dogs, small animals, and live stock. Donations and grants are not only used to feed, house, and provide veterinary services to the animals, but also to enrich the life of each animal.

Did you know? In one week, the Fond du Lac Humane Society's capacity of 40 dogs can go through 546 lbs of dog food. In one year, the organization can purchase more than 28,000 lbs of dog food. At a cost of \$44.99 per bag, over \$30,000 in dog food is needed. Thanks to Harold's legacy gift, these costs are offset and put less of a burden on the organization.



Pictured: Tami Doering, Molly Jaster & Chi Chi, Kayla Schumacher, Riley Benz & Fig

Planned Giving - A Legacy that Grows

Planned giving is philanthropy combined with smart financial planning. It allows you to make the most of your assets during your lifetime and helps you make future charitable gifts that are often much larger than you may have thought possible.

Joining our **Legacy Society** is easy — it requires just two steps.

1. Include the Foundation in your estate plan through your will or trust or make a contribution via a charitable gift annuity, life insurance, retirement fund assets or a charitable remainder or lead trust.
2. Inform us you have made these arrangements and let us know if you would like your name included in future listings of the Legacy Society, or if you would like to be included in future meetings and gatherings.

Leave a Legacy
in partnership with the Fond du Lac Area Foundation

Contact Kayla Schumacher at
kayla@fdlareafoundation.com
or call (920) 921-2215 to learn more.



Statement of Revenue and Expenses

	2018	2019
Income		
Additions to Funds	\$1,761,116	\$2,506,932
Investment Income (Loss)	\$787,657	\$884,176
Income (Loss) on Investments	\$-2,643,442	\$6,355,621
Other Income	<u>\$18,506</u>	<u>\$6,777</u>
Total Revenue and Support	\$-76,163	\$9,753,506
Grants and Expenses		
Grants	\$1,486,648	\$1,420,627
Administrative Expenses	\$476,790	\$493,669
Program Related Expenses	\$1,181	\$94,648
Other Disbursements	<u>\$11,450</u>	<u>\$11,442</u>
Total Disbursements	\$1,986,702	\$2,020,386
Net Assets		
Net Assets - Beginning	\$39,133,855	\$37,080,119
Net Assets - Ending	<u>\$37,080,119</u>	<u>\$45,072,661</u>
Supporting Organizations		
<i>Sophia Foundation, Inc.</i>	\$839,031	\$885,71
<i>LIVS Fund</i>	\$1,000,226	\$2,808,841
Total Net Assets	\$38,919,376	\$48,767,219

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.

Board of Directors

Thomas J. Gross, *Chairman*
 David J. Hornung, *Vice Chairman*
 Loree L. Shady, *Secretary*
 Aaron Sadoff, *Treasurer*
 Tripp Ahern
 Sara B. Andrew
 Dawn M. Colwin
 Steven J. Dilling
 Therese Massey
 Steven G. Millin
 Karen A. Wuest

Foundation Staff

Joseph Braun
Executive Director

Molly Jaster
Marketing & Communication Manager

Erin Mueller
Business Manager & Scholarship Dir.

Kayla Schumacher
Donor Relations Manager

Jenny Zacherl
Grants & Donor Relations Associate

27

new funds

200

scholarships awarded

406

grants disbursed

21

*legacy society members**

* living individuals only

2019 Grants by Fund Type

Donor Advised	\$390,637
Designated	\$436,536
Field of Interest	\$132,820
Scholarship	\$233,917
Unrestricted	\$226,717
Total Grants	\$1,420,627

