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Fond du Lac Area
FOUNDATION

REPORT TO THE COMMUNITY 2023

A MESSAGE FROM *Aaron Sadoff*

Forty-eight years ago in 1975, the Foundation set out to make giving comfortable, convenient, and cost-effective, and we have continued to promote and facilitate giving with confidence. Every day we live our motto helping people help people by customizing philanthropy to fit our donors' intentions and communities' needs. Helping people with generous hearts and minds collaborate with passionate people who serve the needs of our community is the business of the Foundation, and business is good.

Gratitude is the fuel for growth, caring, and kindness, and at the Foundation we are grateful for:

- **Our founders** for their vision and courage to dream of a better community.
- **Our donors** for giving your treasure of gifts and kindness; giving back; being the backbone of your Foundation.
- **Our grant seekers** for giving your time and talent, remaining dedicated to making our community great, and serving those in need.
- **Our staff and volunteers** for your time and talent, positive influence on others, and for making the Foundation work.

We believe that a thriving community is one in which all people feel cared for, invested in, nourished, and valued, and have an equitable opportunity to contribute to the well-being and growth of themselves, their families, and their communities. This belief is woven into the work we do each day, both in the office and hands-on in the communities we serve.

We provide this Report to the Community as a testimonial of the heart and soul of the greater Fond du Lac region where together we are making a difference by creating a community we get to call home. Enjoy the stories, photos, and data that share the successes of the Foundation and the difference each of you have made. We are proud to be **your** community foundation and look forward to continuing to make our community stronger by helping people help people.

BOARD OF DIRECTORS

David Hornung, *Chair* • Loree Shady, *Vice Chair* • Tripp Ahern
Sara B. Andrew, *Secretary* • Holly Brenner • Dawn Colwin • Steven Franke
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SCHOLARSHIPS THAT *Matter*



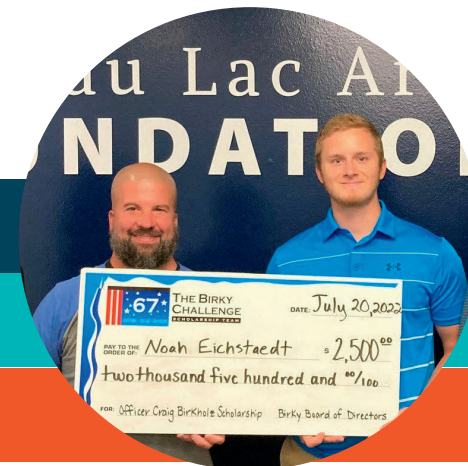
Julie Riese passed away on April 19, 2019 following a courageous 11-year fight with metastatic breast cancer.

In 2021, her husband George established the **Julie Riese Memorial Scholarship** to honor her passion for realizing and empowering potential. In 2022, Braylee Freund and Margaret Sawicki each received a \$1,000 scholarship from the fund.



Awarding scholarships is fulfilling, but meeting the recipients and hearing about their personal journeys is even better!

That is exactly what our team and Harold Barfknecht, representative of the **Agnes Rose Memorial Scholarship Fund**, got to do at the 2022 Scholarship Luncheon hosted by Moraine Park Technical College.



The **Officer Craig Birkholz Scholarship** awards an annual scholarship to undergraduates or military veterans who are enrolled in a Wisconsin-based college and are pursuing either a two-year or four-year degree in police science or criminal justice. Noah Eichstaedt was the 2022 scholarship recipient, pictured with fund administrator Bill Ledger.

Community Engagement



The Legacy Luncheon Returns

After a couple years' break due to the pandemic, we were able to host our annual **Legacy Luncheon** in May 2022. Those who gathered in this room, along with countless others not in attendance, have worked hard to write their personal story of charitable giving. It is our honor to work alongside them to bring it to fruition while also recognizing and honoring their intentions.

Connecting with Future Philanthropists

Philanthropy took flight in a kindergarten classroom as our team taught local students about giving back. Each student was asked what they wanted to be when they grew up, what they dreamed their salary would be, how much they may like to **give back to their community**, and where they would like to donate the money to. The students came up with great career aspirations and beneficiaries, and they even got to fill out the big check on their own.



Community Shred Day

We put out an open invitation to Fond du Lac County to attend a **Free Community Shred Day** and the response was incredible. Our team was busy directing vehicles, unloading paperwork, shredding, and meeting friendly citizens. Our goal of keeping your personal information secure while raising awareness of the Foundation was a huge success because of your attendance and support.



Leadership Fond du Lac Panel

For the first time, a panel of local fundraising experts including Executive Director Aaron Sadoff gathered to offer their best advice for how Leadership Fond du Lac groups can successfully collect the required donations for their annual projects to benefit the community. Since the inception of **Leadership Fond du Lac**, over \$600,000 in projects have benefited our community. That number does not include the countless professionals who have gained immeasurable knowledge and skills through the series.



Volunteer of the Year

Each year, we proudly contribute \$1,000 to the Envision Greater Fond du Lac Annual Meeting. How is that money used? To better our community, of course.

The **Volunteer of the Year** Award recipient not only receives accolades from Envision, but also gets to choose a nonprofit to award a \$1,000 grant to. The Foundation disburses the grant to the nonprofit in the name of the Volunteer of the Year.

Congratulations to the 2022 Volunteer of the Year — **Jason Zellner of First Weber Realtors**. The award have been a longstanding annual community tradition carried forward from the Association of Commerce by Envision Greater Fond du Lac to recognize the volunteers who are critical to the success of the organization's programming.

United Youth Advisory Board

The **United Youth Advisory Board**, a collaboration between the Fond du Lac Area United Way and the Fond du Lac Area Foundation, is a board comprised of high school students and an advisor.

Student participants represent the school districts of North Fond du Lac, Campbellsport, and Fond du Lac, as well as St. Mary's Springs Academy.

The group oversees a budget of \$6,000 and encourages nonprofit organizations to apply for mini-grants to benefit youth programs. United Youth then awards the grants to nonprofits based on their applications and organization needs. Grants generally range from \$500-\$1,500.

For more than two decades, the Fond du Lac Area Foundation has provided a matching grant to the program, allowing the youth board to double their impact on youth-serving organizations throughout the county.



Community Focused Giving

Michael & Teresa Keenan Fund

Children. Animal welfare. Veteran services. Those are just a few of the causes most near and dear to the **Michael and Teresa Keenan Fund**.

The Keenans joined the Foundation to make community giving a more deliberate part of their annual planning and to allow their money to grow, which means they can make grants of larger impact. Starting the fund to maximize their giving as a couple made good financial sense and provides the flexibility they desire.

Having grown up in Fond du Lac County, close-knit community has been a way of life for Michael and Teresa. As they grew into adulthood, the urge to make a difference in their own way was palpable.

Michael and Teresa love the place they call home and believe it is important to “pay it forward.” They refer to their giving as the **Community Focused Giving Plan**.

Together, they have donated nearly \$40,000 and over 80% of that has stayed local to the Fond du Lac community.

The collaborative relationship developed between the Michael and Teresa Keenan Fund and the Fond du Lac Area Foundation has brought out the strengths of both by taking advantage of the Foundation's **administrative support** and **asset management** experience while allowing the Keenan family to focus on **fund growth** and fostering **community relationships**.

“The fund is partially funded in a discretionary manner, but also based on my real estate activity. About five years ago, while planning for my real estate career, we made the decision that with each of my closings, we would donate \$200 to the nonprofit of my client’s choice in lieu a “traditional” closing gift.

Teresa Keenan





Honoring Legacy with Meaningful Grants

Carol Jane Graham **MEMORIAL FUND**

As Paul Graham and his wife Carol Jane prepared to move to Wisconsin in 2006 for his new career at Grande Cheese, the family faced tragedy. Carol Jane unexpectedly passed away just before they completed the move. Paul found himself as a new member of the Fond du Lac community and the single father to his severely intellectually disabled son, Mark.

Paul's fellow associates at Grande and others in the community became a lifeline as they connected Paul with the resources he most needed for Mark, including organizations like The Arc of Fond du Lac.

As Paul, Mark, and their family learned to navigate a new version of life together, Paul leaned on the lessons that shaped him. With parents and family who provided the bedrock for his life, Paul was raised from a young age to have faith, to be kind, to love all, and to work hard. He took each of those concepts and implemented them into his roles of father, employee, community member, and philanthropist.

While Paul settled into life in Fond du Lac, he was introduced to the Fond du Lac Area Foundation. Having recently lost Carol Jane, he thought a fund in her name would be a beautiful way to honor her and provide a helping hand. The **Carol Jane Graham Memorial Fund** was established in 2007 with the purpose of providing financial assistance for **enhancing the lives of individuals with developmental disabilities**.

The intention of the fund is to provide supplemental resources only when there is no other available public or private money to those truly in need of financial assistance. Since the fund's inception, grants have been distributed to **The Arc of Fond du Lac, Cristo Rey Ranch, Wisconsin Badger Camp, Cerebral Palsy of Mideast Wisconsin, and Bethesda Camp Ministry**.

“When a child is born, we want them to be successful. When a child has intellectual disabilities, we rethink what success is. We tend to think that success is measured by financial success or “being the next President.” In reality, it is living a fulfilled life, having faith in God, and being happy. A key part of happiness is a social life and access to entertainment, hence the role and importance of Carol Jane's memorial fund.

Paul Graham”

Legacy Funds: Giving Beyond Your Lifetime

A legacy fund receives your planned gifts and contains your instructions regarding support of charities after your lifetime. Distributions from your personalized fund will be made in accordance with the directions you establish in consultation with the Fond du Lac Area Foundation. Changes to these arrangements can be made any time during your lifetime.



Harry and Betty Schneider

A LEGACY FUND IS...

Personal: The charitable cause or causes with special meaning and importance to you will receive future gifts from your fund.

Flexible: Your legacy fund can receive some or all of the charitable portion of your estate. Among the gifts you can make as estate gifts or during your lifetime are IRAs, real estate, real property, life insurance, charitable gift annuities, charitable remainder trusts, cash, and appreciated securities.

Enduring: A permanently endowed fund provides an enduring source of strength for the charitable cause(s) you want to support. Our staff oversee the distribution process into perpetuity, making certain that your intentions are honored after your lifetime.

HARRY & BETTY *Schneider*

Harold R. and Elizabeth A. Schneider Memorial Endowment Fund

Betty and Harry Schneider have spent their lives working hard and practicing smart financial habits. Both were raised in large families and witnessed the power of community from a young age.

Harry witnessed the community step forward with assistance during times of his father's employment strikes and periods of layoff. In Betty's household, the family worked hard and enjoyed the simple things like reading. Both families were deeply rooted in their faith.

Those life lessons from childhood led them to give back to areas they developed a deep passion for, including faith, community, and literacy.

In 2021, the **Harold R. and Elizabeth A. Schneider Memorial Endowment Fund** was established to support three areas: the less fortunate of the **community**, North Fond du Lac's **Spillman Public Library** and the **Fond du Lac Public Library**, and **Holy Family Catholic Church** (endowment fund and operations).

For countless years, the Schneiders have leaned into their Christian faith and values while quietly focusing on giving back to their community. No accolades are desired from Betty and Harry; it is simply enough to have the fulfillment of knowing Fond du Lac will have resources from their fund after their lifetime.

AGENCY

- Beaver Dam Lake Improvement Association Fund*
- Bo's Heavenly Clubhouse Fund*
- Children's Museum of Fond du Lac Fund
- Dodge County Fair Association Fund*
- Lomira K-9 Fund*
- Mayville Open Door Fund*
- New Beginnings Homeless Shelter of Dodge County*
- Red Line Fund*

DESIGNATED

- City of Ripon Community Fund
- Green Valley Legacy Fund*
- James E. & Diane K. Hanks Fund*
- John H. Schiller Fund

DONOR ADVISED

- Donald J. & Mary D. Geddeis Charitable Fund*
- Fox Valley Insurance Group Fund
- Horicon Area Fund
- Kevin Fischer Maga Fund
- Patrick & Samantha Flood Family Fund
- Reчек Family Fund*
- Schwertfeger Fund

FIELD OF INTEREST

- Conflict Resolution Center Legacy Fund
- Reilly Pet Care Fund

SCHOLARSHIP

- American Legion Post 454 Mt. Calvary Scholarship Fund
- Destiny C. Kogler-Reinwald Scholarship Fund
- Dornfeld Scholarship Fund
- Fredric Ulrich Scholarship Fund
- Larry Martiny Servant Leadership Fund
- Pete Runde Memorial Music Fund
- Rita & Robert Rucks Special Education Scholarship Fund
- Walter R. Bussewitz Scholarship Fund

A New Fund

HONORING A FUREVER FRIEND

In November 2022, Josette (Jo) Schouten walked into the Fond du Lac Area Foundation with one goal in mind - create a fund that would make a difference in the lives of people and pets.

Jo established the **Reilly Pet Care Fund** in recognition of her love for animals and in memory of her beloved pup, Reilly.

Reilly came into the Schouten's lives in the middle of a January night. Jo's husband was on his way home when he noticed a dog was following his vehicle. Thinking the dog would stop when it reached the property line of its owner, he continued on. But, the pup kept following. He stopped the vehicle, opened the door, and the dog jumped in!

With no collar or tag to guide them, the Schouten's contacted the neighbors where she was spotted as well as the local shelter to find where she belonged. No one came forward to claim her. Sadly, she was likely abandoned in below zero weather by her owner.

Why a fund in honor of Reilly? One of the economic costs of owning a pet is medical care. The goal of the fund is to provide a means to provide the financial support for preventive care, injury, and catastrophic care so pets will not have to be surrendered or abandoned and can remain with their owners.

By saving pets' lives, this fund celebrates and strengthens the human-animal bond because pets are family.



Jo and Reilly

Statement of Revenue and Expenses

	2021	2022
Income		
Additions to Funds	6,876,531	3,471,994
Investment Income (Loss)	774,368	1,172,145
Income (Loss) on Investments	4,949,248	-11,673,898
Other Income	0	0
Total Revenue & Support	12,600,147	-7,029,759
Grants and Expenses		
Grants	1,989,162	3,903,108
Admin Expenses	678,175	1,425,000
Program Related Expenses	136,070	151,915
Other Disbursements	50,000	0
Total Disbursements	2,853,407	5,480,023
Net Assets - Beginning	56,406,518	66,153,258
Net Assets - Ending	66,153,258	54,057,055
Supporting Organizations		
Sophia Transformative Leadership Partners	855,297	699,469
LIVS Fund	6,556,372	5,366,527
Total Net Assets	73,564,927	60,123,051

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.

GROWING COMMUNITY *Impact*

GRANTS

864

One way we support a strong community is through grant awards. In 2022, we disbursed 48 more grants than the previous year.

SCHOLARSHIPS

211

Scholarships reward deserving students with the ability to afford higher education. In 2022, we awarded 211 scholarships which grew from 155 the previous year.

NEW FUNDS

29

Family is important, and those in our Family of Funds are no different. 29 new named funds – including donor advised, scholarship, endowed, field of interest, and designated – joined our mission for good.

For a full list of our Family of Funds, visit fdlareafoundation.com



Fond du Lac Area Foundation
1020 S. Main Street, Suite E
Fond du Lac, WI 54935

www.fdlareafoundation.com



AARON SADOFF
Executive Director



ERIN MUELLER
Business Manager



KAYLA SCHUMACHER
Donor Relations Manager



MOLLY JASTER
Marketing & Communications Manager



JENNY ZACHERL
Donor Relations & Grants Associate



JACKIE DRAKE
Scholarships & Program Associate

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