



# OSHKOSH AREA COMMUNITY FOUNDATION

For good. For ever. <sup>SM</sup>

## ANNUAL REPORT TO THE COMMUNITY 2017



Learn | Invest | Engage  
IN OUR COMMUNITY



## Welcome

The Oshkosh Area Community Foundation was established to strengthen our community

for good and for ever. We do this by continuing to connect the needs of the area with the desires of generous people.

Our job is to research and understand what our service area strives to be. This knowledge separates us from other charitable giving options. This is what links our donors directly to any local individual cause that they are looking for.

If you, our donors, are looking to help a nonprofit that you have been touched by, to construct a new project, to offer a new program, or to build an endowment for the future, then your Oshkosh Area Community Foundation can help make it happen.

Sincerely,

Bill Wyman  
President/CEO

Jason Hirschberg  
2017-2018 Board Chair

## What is the Oshkosh Area Community Foundation?

The Oshkosh Area Community Foundation is a 501(c)3 nonprofit organization that works with hundreds of donors who wish to invest in the future of our community.

Since 1928, the Oshkosh Area Community Foundation has helped donors turn their charitable investments into projects that add energy and vitality to our community. For some donors, we facilitate charitable giving and help them build permanent legacies of support. Others provide gifts to be directed to emerging needs in our communities as identified by our Board of Directors. Serving Winnebago County, Waushara County, Green Lake County and Ripon, the Oshkosh Area Community Foundation strives to advance our communities' quality of life and capacity for excellence.

## Our Mission

**Our mission is simple: to strengthen our communities.**

We bring together leadership and funding to engage the community by coordinating local change efforts, engaging citizens, and bringing diverse voices and views together to address current and emerging needs.

We help groups and individuals from all walks of life make meaningful gifts that improve quality of life for perpetuity.

We steward the funds of our donors and connect them to important projects in our community in order to see their philanthropic dreams come to life.

## 2017 QUICK FACTS

**NEW Charitable FUNDS 40**

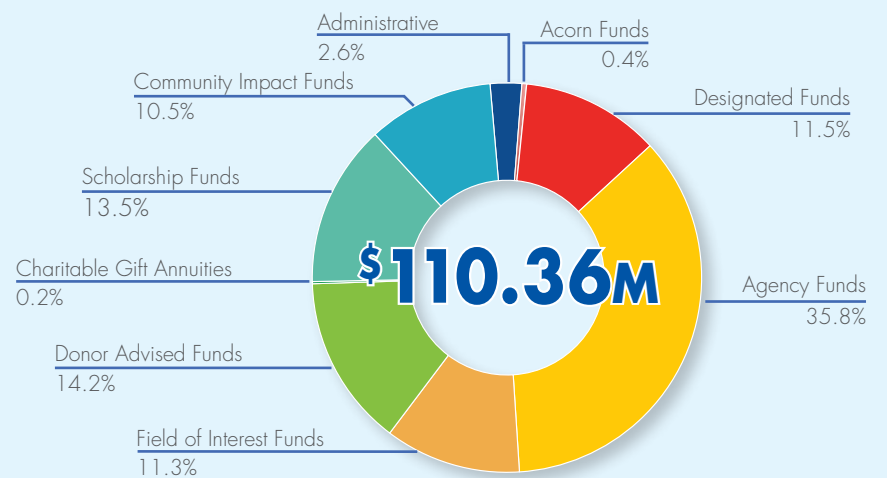
**TOTAL Charitable FUNDS 843**

**6,069 CONTRIBUTIONS**  
Totaling **\$7,863,902**

**1,457 GRANTS**  
Totaling **\$6,126,726**

This annual report is a snapshot of the activity of the Oshkosh Area Community Foundation. More information and updates are available at [www.OshkoshAreaCF.org](http://www.OshkoshAreaCF.org).

**TOTAL ASSETS: \$110,357,444**



### ENDOWED FUNDS – To Support the Future of Winnebago County, Waushara County, Green Lake County and Ripon

#### OSHKOSH AREA COMMUNITY FOUNDATION

##### Community Impact Funds

Anonymous (1)  
Reuben H. Bitter Fund  
Richard Bork Fund  
William and Helen Burger Fund  
Clarendon J. Combs and Jessie Clark Combs Fund  
Community Impact Fund of the Oshkosh Area Community Foundation  
Louis C. Draheim Fund  
Marjorie Drexler Fund  
Horace M. Faulk Memorial Fund  
Mary Malnar Fund  
**Good Samaritan Fund**  
Helen H. and Harry G. Meeleus Fund  
Julia D. and Ralph E. Petersen Fund  
Norma E. Sartwell Estate Fund  
John and Helen Schuster OACF Community Impact Fund  
June F. Schwalm and A. Thomas Schwalm Fund  
E. B. Williams Fund  
Herbert C. Yagers and Mae Yagers Memorial Fund

##### Field of Interest Funds

Arts in our Daily Lives Fund  
Mildred M. and Edward W. Baar Youth and Education Fund  
Career Transition Fund  
Child Care Provider Training Fund - Green Lake County  
Child Care Provider Training Fund - Winnebago County  
Environmental Endowment Fund  
Fund for the Arts  
A Fund to Promote Awareness of Alzheimer's Disease and Related Dementias  
Charles and Marian Garbrecht Fund  
Guenther-Matz Trust Fund  
Hiwela Youth Fund  
Carl W. Ives Fund  
Henry H. and Patricia W. Kimberly Fund for Youth  
Ladies Benevolent Society: Advocates for Older Adults Fund  
Emil & Louise Marohn Family Memorial Fund

Carl Matz Fund  
Odd Fellows Endowment Fund  
OHS Class of '63 Endowment Fund  
Oshkosh 150 Anniversary History Fund  
Oshkosh Area Economic Development Corp.'s Downtown Impact Fund  
Oshkosh Chamber Community Education Fund  
Oshkosh Youth Fund  
Al and Lucille Oswald Public Safety Fund  
Ema O. Payton Fund  
Lucille and Edward Plashko Fund  
Elizabeth J. Rasmussen School Program Fund  
Edward and Belle Rudyoy Endowment Fund  
Grace M. Shimek Fund  
Margaret Tabbert Fund  
L. S. Tuttle Memorial Fund  
U.S. Venture Fund for Basic Needs  
Winnebago County Crime Prevention Fund  
M. Jarlath Wolf Fund for the Elderly  
Zmolek Family Education Fund

##### Donor Advised Funds

Abigail Fund  
Allured Fund for Confectionery Education  
Anonymous (5)  
Brandon J. Backus Fund  
Birmingham Fund  
Willard and Val Carlson Memorial Fund  
M.J. Castle Fund  
Thomas and Trisha Castle Fund  
Jean I. Caudle Fund  
Robert J. Christman Fund  
**Community Solutions Fund**  
Corcoran Family Fund  
Howard and Alice Curler Memorial Fund  
Linda and Tim Dempsey Fund  
N. L. Dirlam Fund  
Driftwood Fund  
Dumke Family Fund  
FOI Fund

Katrina Rose and William James Edwards Fund  
Cameron Victor Cassere Fund  
David and Sharon Geurden Fund  
Jeffrey W. Glasheim Family Fund  
Charles T. and Jean F. Gorham Fund  
Karen Gremminger and Mark Bullard Donor Advised Fund  
Adam D. Gundlach Fund  
Tom and Penny Harenburg Fund  
Kirk and Anne Haverland Family Fund  
Heaney Family Fund  
Evelyn Heuer Fund  
Hirschberg Family Fund  
Eric and Kristen Hoopman Fund  
Laurie Hoopman Family Fund  
Douglas and Christina Hyde Fund  
Marianne and Tom Ivey Charitable Fund  
JJD Fund  
Colonel George Johnson Fund  
Patrick Keesler and Eileen Connolly-Keesler Fund  
J. J. Keller Foundation Fund  
Robert and Linda Koch Fund  
Koeppler Family Fund  
Barbara Krause Memorial Athletic Fund  
Stephen and Tricia Landolt Fund  
Peter and Megan Lang Fund  
Paul and Peg Larson Fund  
Bradford and Maureen Lasky Fund  
Jason and Courtney Lasky Family Fund  
David and Sue Leach Fund  
Kelsey M. Leach Fund  
Pete and Lucy Leach Fund  
Phyllis Leach Fund  
Luther Family Fund  
Maggie and Morgan Main Fund  
Howard and Bonnie Marousek Fund  
Clair and Helen Martin Family Fund  
**Phillip J. Martini and Constance T. Martini Fund**  
**Joby Marx Fund**  
Sarah and Hank (Henry) Mathewson Fund  
Johan A. Mathison, M.D. Fund

McConnell Family Foundation Fund  
Linda Knapp McCreery Memorial Fund  
Dr. Donald J. and Sylvia E. McDonald Donor Advised Fund  
McDonald Kimbrough Fund  
Drs. Robert and Caroline McDonald Fund  
Carol E. McIlree Fund  
Metzig Conservation Fund  
Monnett Family Fund  
The John and Jane Mosling Fund  
**Ralph and Kathryn Mosling Family Fund**  
Robert and Carol Niendorf Fund  
**Norden-Vanden Heuvel Charitable Giving Fund**  
The Olson Family Fund  
David and Carla Omachinski Fund  
OptiVision Doctors Fund  
Oshkosh Coil Spring Fund  
Oshkosh Northwestern Fund  
Thomas R. Pech Sr. & Dolores (Dee) Pech Memorial Fund  
Richard and Audrey Pennau Fund  
Pfaendner Legacy Fund  
Tim Pinnow and Heather Holly-Pinnow Family Fund  
Provident Financial Consultants Fund  
Robert E. Pung Memorial Fund  
William and Deborah Quandt Fund  
Steven L. Randall Memorial Fund  
**Rommelfanger Family Fund**  
Paul (PJ) Rottman Fund  
Janet Scalpone Fund  
**John and Amy Schiek Family Fund**  
Dennis and Gail Schwab Fund  
Michael and Lisa Scott Fund  
Seibold Family Fund  
**Carey and R.J. Sharpe Family Fund**  
Tom Shepack Memorial Fund  
**Dr. Eric Smiltneek Healthy Student Fund**  
Stapel Family Fund  
**William D. Steenberg Fund**  
Kenley and Carole Steinert Fund  
Sullivan Schumacher Fund  
Take 5 Fund



## About the Cover

The heart of Oshkosh, our downtown, has been beating strong since the 1800's. It has been the pulse of life for families, neighborhoods, and businesses since it began. Your Community Foundation understands the importance of a vibrant downtown, and we honor it's heartbeat this year by showcasing stories that pay tribute to our past, present and future.

The photos featured on the cover of the new downtown YMCA, the renderings of the prospective William Waters Plaza, and so much more that we see down on Main Street was made possible thanks to your philanthropic efforts. Endowments, bequests, private/public partnerships, direct contributions, and investments through financial advisors are just some of the many ways that donors have given to projects that strengthen our community.

# Making a Difference

Thanks to the many donations of time and financial resources, your Oshkosh Area Community Foundation is able to lead the way on a myriad of projects and programs that support our four major pillars of community impact. Four such examples are abbreviated here for you.

## Economic Development

Oshkosh is in the midst of another economic boom, the likes of which our city hasn't seen since the milling days. In order to capitalize on this momentum leaders throughout the community representing education, development, city management, and more have all banded together foster one common positive message for the city. Known simply as the Oshkosh Image Campaign, this 3-year project serves to elevate stories of the quality of life we live as residents of Oshkosh through a wide variety of media outlets.

## Housing/Neighborhoods

Oshkosh4Education's "Project CURB" was one of the largest neighborhood projects of 2017. Led by Chairperson Beth Wyman, Project CURB raised nearly \$200,000 in donations and in-kind contributions. While much of the contractor work was done ahead of time, over 600 community volunteers came out the morning of Saturday, September 23rd to donate their time to enhance the curb

appeal of all of Oshkosh's public schools. Improvements included new landscaping, fresh paint, baseball diamonds, playground equipment, benches, flower pots, trees and more!

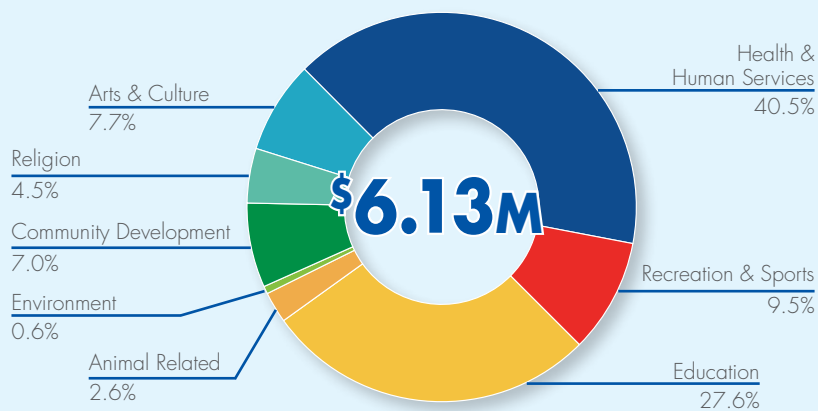
## Education

The new Reader's Cafe Student Literacy Intervention programs at the Boys & Girls Club of Oshkosh are increasing reading confidence, fluency, and proficiency for club members who are experiencing academic challenges with reading. Low literacy skills are being improved through tutoring, readers theaters, choral reading, and book clubs. This collaboration between the Boys & Girls Club of Oshkosh and the Winnebago County Literacy Council showcases just how fun reading can be once students have the support they need to thrive.

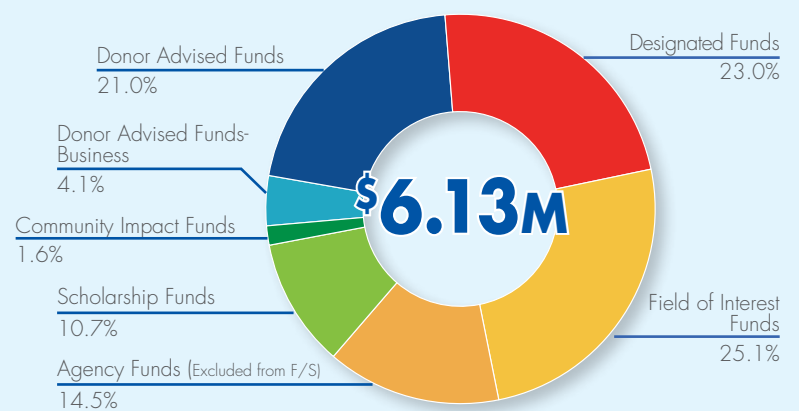
## Health & Wellness

The suicide rates among Wisconsin's youth are 30 percent higher than the national average. Suicide prevention, intervention, and grief support are crucial components of mental health and wellness. Recent Oshkosh Area Community Foundation fund holder investments aim to increase the range of mental health services that Community for Hope and NAMI (National Alliance on Mental Health) Oshkosh are able to offer our students and our entire community.

## GRANTS BY PROGRAM TYPE: \$6,126,726



## GRANTS BY FUND TYPE: \$6,126,726



Mary J. Tank Memorial Fund  
TFL Fund  
Jeff and Ann Tremblay Fund  
Mark D. and Christine G. Troutt Donor Advised Fund  
John L. and Susan T. Vette Family Fund  
Sgt. Andrew Wallace Donor Advised Fund  
Alex Wesner Memorial Fund  
WHW Oshkosh B'Gosh Family Fund  
Russell F. and Jeannette E. Williams Memorial Fund  
**Thomas and Debra Wirtz Charity Fund**  
Bill and Beth Wyman Fund  
Thomas and Shirley Wyman Fund  
Wayne and Suzanne Youngwirth Endowment Fund

**Giving Circle Funds**  
M<sup>3</sup> Fund  
Oshkosh Angels Giving Circle Fund  
Women Who Care-Greater Oshkosh Giving Circle  
Young N.U.T.S. (Never Underestimate the Sisterhood) Fund

**Designated Funds**  
ADVOCAP, Reducing Poverty Fund  
Alzheimer's Association of Greater Wisconsin Fund  
American Red Cross Fund  
Anonymous (3)  
Ronald J. and Marion E. Bell Fund  
Bethel Foundation of Oshkosh Dream Weaver Fund  
Bethel Foundation of Oshkosh Fund  
Big Brothers Big Sisters of the Fox Valley Region Fund  
Bletzinger House Fund  
Boys & Girls Club Alumni Fund  
Boys and Girls Club of Oshkosh, Inc. Designated Fund  
Boys and Girls Club of Oshkosh, Inc. Donor Specified Fund  
Boys and Girls Club of Oshkosh Outdoor Education and Recreation Fund  
Boys and Girls Club Operating Fund  
Boys and Girls Club of the Tri-County Area Endowment Fund  
Boys and Girls Club Unmet Needs Endowment Fund  
Viola Bradley Farm Progress Days Scholarship Fund  
Christine Ann Domestic Abuse Services Fund  
Christine Ann Domestic Abuse Services Maintenance Fund  
Clarity Care Endowment Fund for Program Support

Starr H. Clark Endowment Fund  
Cog Cat Fund  
Congregation B'nai Israel Holocaust Memorial Garden Fund  
Congregation B'nai Israel Fund  
Covey Fund: Advocating Rights & Choices for People with Disabilities  
Covey, Inc. Fund  
Day by Day Warming Shelter Building Fund  
Day by Day Warming Shelter Contingency Fund  
Day by Day Warming Shelter Operational Fund  
Diverse Options Inc. Fund  
Evening of Stars Event Fund  
Family Services of Northeast Wisconsin Fund  
Rod and Jean Farmer YMCA Fund  
Feeding America Eastern Wisconsin Foundation Fund  
The Joyce Jones Fick Book Fund  
First Congregational Church Endowment Fund  
First Congregational Church General Fund  
First Congregational Church Manser Memorial Fund  
First Congregational Church Triss Fund  
Friend of the Oshkosh Area Community Foundation Fund  
Friends of Mount Morris Lakes Endowment Fund  
Friends of OCM Fund (Oshkosh Community Media)  
Friends of Oshkosh Parks, Inc. Fund  
Friends of the Oshkosh Area Fund  
Friends of the Oshkosh Seniors Center Endowment Fund  
Frank Fuller Fund  
Gift Card Fund  
Girl Scouts of the Northwestern Great Lakes, Inc. Fund  
Goodwill Industries of North Central Wisconsin Endowment Fund  
Grand Performance Fund of the Oshkosh Opera House Foundation  
Karen M. Gremminger and S. Mark Bullard Fund for the Christine Ann Center  
Karen M. Gremminger and S. Mark Bullard Fund for the Oshkosh Humane Society  
Habitat for Humanity Fund  
Tom and Penny Harenburg Zoo Fund  
Hooper Community Center Fund  
Helen Hooper Fund

**Marsha and Richard Hughes Health Fund**  
Jazz Memorial Fund for the benefit of the Oshkosh Area Humane Society  
Kids on Court Tennis Fund  
Henry Kimberly YMCA Fund  
Konrad Pickett Community Center Fund  
Henry and Dorothy Kuetner Endowment Fund  
Leach Amphitheater Fund  
Little Oshkosh Community Playground Fund  
Lourdes Academy Elementary Construction Fund  
**Love of Animals Fund**  
Carol A. Meeuwse-Jones and Norris W. Jones Fund  
Arlene E. Meier Fund for the Oshkosh Area Humane Society  
Ron Metz Centennial Fund  
Military Veterans Museum Endowment Fund  
Constance Misky Endowment Fund  
**The Morgan House Historical Preservation Fund**  
NAMI of Oshkosh Fund  
Neanah-Menasha Emergency Society Fund  
Charles Nevitt Fund  
Northeast Wisconsin Land Trust Land Protection Fund  
Nova Counseling Services Fund  
OACF Reserve Fund  
OAHS Staff Professional Development Fund  
Oakwood Aviation Program Sustainability Fund  
Oakwood Environmental Education Charter Sustainability Fund  
Elaine and Robert Oefflein Fund  
Omro Area Community Center Endowment Fund  
Omro Veterans Memorial Perpetual Care Fund  
Oshkosh Area Community Pantry Fund  
Oshkosh Area Humane Society, Inc. Fund  
Oshkosh Area United Way Fund  
Oshkosh Community YMCA Swim Team Fund  
Oshkosh Convention Center Maintenance Fund  
Oshkosh D.A.R.E. Program Fund  
Oshkosh Downtown Rotary Club Endowment Fund  
Oshkosh Family Inc. Fund  
Oshkosh Fast Club Community Improvement Fund  
Oshkosh Firefighters Charitable Trust Fund  
Oshkosh FIRST Wave Robotics Fund

Oshkosh Jaycees Fund  
Oshkosh Kiwanis Foundation Fund  
Oshkosh Local Project Fund  
**Oshkosh Police Department Fund**  
Oshkosh Public Museum Endowment Fund  
Oshkosh Public Museum Fund  
Oshkosh Saturday Farmers Market Contingency Fund  
Oshkosh Symphony Fund  
Oshkosh Yacht Club Fund  
Oshkosh Youth Baseball Endowment Fund  
Oshkosh Youth Soccer Club Endowment Fund  
Oshkosh Youth Symphony Fund  
Paine Art Center and Gardens, Inc. General Endowment Fund  
Paine Art Center and Gardens, Inc. Mary K. Shirk Endowment Fund  
Paine Gardens Fund  
Park View Health Center Endowment Fund  
Karl and Janice Pennau Family Fund  
Julia D. and Ralph E. Petersen Dental Fund  
Julia D. and Ralph E. Petersen Salvation Army Fund  
Pollock Pool Admissions Endowment Fund  
Pollock Pool Endowment Fund  
Ellenor Porter Youth Orchestra Fund  
Program and Operations Fund of the Oshkosh Area Community Foundation  
Rawhide Fund  
Reach Counseling Fund  
Leonard and Lucille Reinke Fund  
Rotary Speech Disabilities Assistance Fund  
ROXEE Fund  
Belle and Edward H. Rudoy Designated Fund  
Eleanor Ryan Washington School Reading Fund  
Jim Ryan Menominee Zoo Fund  
St. Raphael the Archangel Endowment Fund  
Saint Vincent De Paul Endowment Fund  
Luida E. Sanders Fund  
Howard and Enid Schafer Designated Fund for the Christine Ann Center  
Howard and Enid Schafer Designated Fund for the Oshkosh Area Humane Society

Howard and Enid Schafer Designated Fund for The Salvation Army  
Howard and Enid Schafer Designated Fund for Theda Care At Home Hospice Program  
John and Helen Schuster Lourdes Academy Fund  
Sheldon Nature Area Endowment Fund  
Simenson-Mt. Morris Holden Lutheran Fund  
SOAR Fund  
Mike Solomon/Pheasants Forever Memorial Fund  
Solutions 12 Step Recovery Club Fund  
Southwest Rotary Club Fund  
STEP Industries Fund  
STEP Industries, Inc. Endowment Fund  
Gilkey Stevenson Fund  
Tri-County Community Dental Clinic Endowment Fund  
Tri-County Community Dental Clinic, Inc. Focus on the Children Fund  
Tri-County Community Dental Clinic Wetherbee Orthodontics Program Fund  
Mildred E. Turner Art and Music Fund  
Mildred E. Turner United Methodist Church Fund  
Mildred E. Turner Youth and Children Fund  
Twentieth Century Club Fund  
Unlock the Fox Fund  
Upper Lakes Fishing Club Fund  
Valley Christian School Endowment Fund  
Bill Van Lieshout Oshkosh North High School Tennis Court Fund  
Lynne Webster Rotary Clock Endowment Fund  
Webster Stanley Fund  
Kay Wilde Memorial Fund  
Winnebago Conflict Resolution Fund  
Winnebago County Historical and Archaeological Society Fund  
Winnebago County Sheriff's Office K-9 Program Fund  
Winnebago Focus Fund  
Winneconne Historical Society - Geraldine Driscoll Memorial Fund  
WPS Fund  
YMCA Endowment Fund



# The Three-Legged Stool

## How Endowments Support the Organizations that We Love

“Fundraising is a three-legged stool between annual campaigns, capital campaigns, and endowment building,” remarked Tom Blaze, President & CEO of the Oshkosh YMCA, as he pondered the importance of endowments. “Of those three, the endowment building gets the least attention, almost as an afterthought, but just like the other two legs it’s vital to keeping an organization upright.”

*“Endowments are a permanent fund. They are a source of income that will help us tend to projects that would otherwise be difficult to find funding for.”*

“For example, there was a year when we needed to replace the indoor soccer arena turf at the 20th Avenue YMCA for over one hundred thousand dollars. Thanks to the endowment we were able to fill this need without having to campaign for it,” said Tom.

Endowment development is easy to put on the back burner because there can be more pressing things that come up, but endowments are crucial to the future of the YMCA.

While Tom is grateful to be leading the organization with its current endowment, noting that many organizations don’t have any at all to speak of, he has his sights set on growing their endowment threefold over course of the next decade.

*“I think most people understand the importance of endowments. In many cases the donors simply don’t know that we need it. Bricks and mortar and other tangible things are relatively easy to raise funds for. People like to literally see what their dollars are going toward shortly after they are given. Endowment building takes much more foresight.”*

“The YMCA is a member organization. Just because many of our members give to our annual campaign doesn’t necessarily mean they’re planning ahead to give to a long-term endowment, or consider us in a bequest. Those decisions come about through years of relationship building, and I think that’s something that we do well.”

Where individual capacity and passion meet, endowments are born. This is what supports the long-term sustainability of an organization, and what allows us to impact our community. For **good**. For **ever**.

*“I’ve learned throughout my career that people want to give – they just need to be approached and guided toward that decision.”*

– Tom Blaze

## ENDOWMENTS ARE FOREVER

An endowment speaks to the future of a community and the desire of people in the present to make sure that generations are ensured the same or better quality of life. People make donations to an endowment and the funds are invested with growth as a goal. From the income, grants are made. The principle of the gift always remains intact.

### Charitable Gift Annuity Funds

David and Carol Cameron Charitable Gift Annuity Fund  
Arlene Sitter Charitable Gift Annuity Fund  
Patricia J. Uhler Charitable Gift Annuity Fund  
Donald R. and Marcia A. Wolter Charitable Gift Annuity Fund for Evergreen Retirement Community  
Donald R. and Marcia A. Wolter Charitable Gift Annuity Fund for Lutheran Homes of Oshkosh

### GREEN LAKE COUNTY/RIPON COMMUNITY FOUNDATION

**Community Impact Funds**  
Lucile M. Grams Fund  
Herman Schultz Fund

### Field of Interest Funds

Green Lake Basic Needs Fund  
Green Lake County/Ripon Community Foundation Fund  
Ripon Fund

### Donor Advised Funds

Audrey and Douglas Lyke Fund  
Phillips Family Foundation Fund  
Princeton Area Community Fund

### Designated Funds

Boys and Girls Club of the Tri-County Area Unmet Needs Endowment Fund  
Card Card Richards and Peacock Library Fund  
Dartford Historical Society Fund  
Friends of the Ripon Public Library Fund  
G.L. Christine Ann Domestic Abuse Services Fund  
Green Lake County Fair Fund  
Green Lake Rotary Fund  
Green Lake Rotary Red Geranium Veterans Fund  
Green Lake School Excellence Fund  
Markesan Public Library Fund  
Alfred T. Peck Jr. Fund  
Princeton Public Library Fund  
Ripon Girl Scouts Fund  
Ripon Historical Society Fund  
Ripon Public Library Fund

Rotary Club of Ripon Charitable Foundation  
Thrasher Opera House Endowment Fund

### LOURDES ACADEMY

#### Designated Funds

Joan I. Bunks Tuition Assistance Fund  
Alyssa Koelbl & Marissa Marx Memorial Scholarship Fund  
Lourdes Academy Athletic Fund  
Lourdes Academy Endowment Fund  
Thomas A. Plein Annual Scholarship Fund  
Douglas L. Posorske Memorial Fund  
Tim Purtell Tuition Fund  
The John C. Stadler Family Memorial Band Fund  
Leonard Stadler Family Capital Improvement Fund  
The John E. and Valois M. Williams Tuition Assistance Fund  
The Dr. E.J. & Donna Zmolek Tuition Assistance Fund

### LOURDES FOUNDATION

#### Designated Funds

Bill Behring Memorial Scholarship Fund  
Father Karl Buresh Scholarship Fund  
Louis Carpenter Memorial - Bishop Wycislo Scholarship Fund  
Corky Daniels Memorial Scholarship Fund  
Helen M. Deniger Scholarship Fund  
John Dewane Scholarship Fund  
James and Kenneth Eichstadt Endowment Fund  
Patricia Lee Foust Memorial Fund  
Dr. Louis Graber Memorial Scholarship Fund  
William Haidlinger Scholarship Fund  
**Mary Jane Juzwiak Endowment Fund**  
John Kapral Memorial Scholarship Fund  
Kemp Family Scholarship Fund  
Judy and Tom Kuble Fund  
Lourdes Foundation Fund  
Lourdes Student Aid Fund  
Jim Matejowec Memorial Scholarship Fund  
Leo M. & Muriel M. Metzler Tuition Assistance Fund  
Constance Misky/Virginia Schneider Scholarship Fund  
Dennis and Karol Noone Family Fund  
Oshkosh Tool Tuition Assistance Fund  
Phair Family Scholarship Fund

John F. Schatz Family Scholarship Fund  
John W. Schmid Memorial Scholarship Fund  
Stanley Spanbauer Family Scholarship Fund  
John C. Stadler Memorial Fund  
The Staszkiwicz Family Scholarship Fund  
Florence Swan Scholarships Fund  
Marlene Van Vuren Scholarship Fund

### OSHKOSH PUBLIC LIBRARY

#### Designated Funds

Karen M. Gremminger and S. Mark Bullard Fund for the Oshkosh Public Library  
Herman Hoxtel Fund  
Carl W. Ives Library Fund  
Charlotte F. James Fund  
Library Development Fund  
Robert H. and Shirley M. Mainwaring Fund  
Oshkosh Public Library Collection Improvement Fund  
The Adelia Fleming Archer Memorial Fund  
Arthur H. Gruenewald Fund  
George Hilton II Special Fund  
Herman L. Hoxtel Fund  
Gertrude Jackson Children’s Memorial Fund  
Eileen D. and William E. Kesh Memorial Fund  
Genevieve Bridget Kenny Memorial Trust Fund  
Mabel Rassmussen Fund  
Frank and Anna Rojahn Fund  
John F. and Helen T. Schuster Fund  
William Steiger Fund  
Steven J. Zellmer Fund  
Oshkosh Public Library Development and Support Fund  
Oshkosh Public Library Facility Improvement Fund  
Oshkosh Public Library Programming Support Fund  
Mary Malnar Children’s Program Fund  
Oshkosh Public Library Technology Fund  
AV Trust Fund  
John V. Nichols Digital Library Development Fund  
Joseph S. Pine Fund  
Ann and Wesley Schneider Library Fund  
William A. Steiger Memorial Fund

### NEENAH JOINT SCHOOL DISTRICT

#### Designated Funds

Frank X. Hochholzer Library Fund  
Horace Mann 6th Grade Learning Experience Fund  
Neenah Joint School District Hall of Fame Fund  
Neenah Joint School District Transitional Education Center (TEC) Program Fund  
Neenah Tennis Program Fund  
Neenah Tomorrow Fund  
**PB&J’s Mental Health Fund**  
Rally ‘Round Reading Fund  
Carol Tipler Student Enrichment Fund  
Vera Tipler Professional Development Fund  
Gus Toepel Fund

### OSHKOSH AREA SCHOOL DISTRICT EDUCATION FOUNDATION

#### Designated Funds

Helen A. Beach Fund  
Jenn Friederich Memorial Fund  
Gunnar D. Naslund Cross Country Memorial Award Fund  
A.B. O’Neil Memorial Fund  
Oshkosh Area School District Education Foundation Fund  
Oshkosh High School Alumni Opportunity Fund  
George M. Steele High School Fund

### RIPON EDUCATION FOUNDATION

#### Designated Funds

Ripon Education Foundation Program Fund  
Jennie Long Tutorial Fund

### WINNECONNE AREA COMMUNITY FOUNDATION

#### Field of Interest Funds

Winneconne Area Community Foundation Fund  
Winneconne Basic Needs Fund  
Winneconne Civic League Fund

#### Donor Advised Funds

AlbrightNext Generation Fund  
Winneconne Community School District Extra Curricular Fund

#### Designated Funds

American Legion #364 Giles Luce Post Youth Fund  
Butte des Morts Conservation Club Fund  
Butte des Morts Lions Fund  
Friends of the Winneconne Library Fund  
Winneconne Area Education Fund  
Winneconne Historical Society Operations Fund

### WOMEN’S FUND OF THE OSHKOSH AREA COMMUNITY FOUNDATION

#### Community Impact Funds

Patricia J. Koll Fund

#### Field of Interest Funds

Jean I. Caudle Fund for Women  
Susan Hardy Heaney and Doris Hardy Schwalm Fund  
Nina M. McCandless Fund  
Rose Fund  
Dorothy Ruland Fund  
Josephine and Marie Schneider Fund  
Arlene Sitter Fund  
Ruth Vorpahl Education Fund  
Jeanette G. Westfahl Fund  
Women’s Fund of the Oshkosh Area Community Foundation

#### Donor Advised Funds

A Cut Above Fund  
Alice/Adella Fund  
Community First Credit Union Fund  
N. L. Dirlam Women’s Fund  
David and Susan Elbing Fund  
Granny Annie Fund

# William Waters Plaza

## A Private/Public Masterpiece

Several decades ago State Street terminated at the stairs of the Oshkosh Public Library on Washington Avenue. As city engineers sought to alleviate an awkward series of short turns to get from State Street to Jefferson Street, the roads were re-worked to meet directly, and thus a small triangle of land was created in front of the library. Shortly after that, the Rotary clubs partnered with the city to enhance the space with pavement, seating, and a dedication.

It's no surprise that the Community Foundation gravitates to these kind of projects. The longevity of a private/public partnership ensures that whatever is being worked on will be a gem for the community for years to come. We've seen it with the Leach Amphitheater and the Grand Opera House Square (among many others), and now we see it again with William Waters Plaza.

"River East Neighborhood came to us and asked 'can we please partner and do something extraordinary here,'" said Alexa Naudziunas, Assistant Planner for Community Development for the City of Oshkosh. It was a perfect fit for our long-term strategic plan."

*"The plaza improvements enhance local quality of life, support economic development, improve existing infrastructure, and strengthen our neighborhoods."*

Time and time again these goals align with the nature of your Oshkosh Area Community Foundation. "The key word here is neighborhoods," remarked Naudziunas. "The plaza is truly geared to be a place to draw traffic. With the renovation of The Howard, the YMCA, the historic apartments and even Washington Avenue itself, the plaza could be a major hub for foot traffic and community use.

*With downtown Main Street on one end and The Waters at the other, Washington Avenue is a pathway through history featuring prominent architecture by William Waters, who designed over 150 buildings throughout our community."*

"When the city partnered with the Foundation in 2016 to provide support for the project, we never could have imagined how well it would be received," noted Naudziunas.

The new and improved William Waters Plaza is expected to be finished concurrently with the improvements to Washington Avenue in the latter half of 2018. Neighborhood residents and our entire community can take pride in knowing that their private/public partnership made a mark that will last. For **good**. For **ever**.



*"Public dollars and private dollars are being leveraged to provide wonderful enhancements for our community."*

*— Alexa Naudziunas*

## PRIVATE/PUBLIC PARTNERSHIPS

Where passionate philanthropy of private dollars meet the pursuit of community excellence through public dollars, collaborations between our donors and the City of Oshkosh bring masterpieces to life. Our dreams of today are the realities of our community tomorrow.

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Funds established from July 1, 2016 to June 30, 2017 are listed in bold.

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Contributors List Continued on Page 6

# A Century of Support

## A Family Legacy of Downtown Philanthropy

"Philanthropy is just really fun!" said Jim Stapel, President of Kitz & Pfeil Hardware. "It's about so much more than money. If you're blessed with something to give away, you end up gaining back so much in return." The Stapel family's charitable giving includes scholarships for organists and nurses, various religious donations, support for Rotary International, and more.

Kitz & Pfeil was started in 1913 by Joseph H. Kitz and Charles E. Pfeil. They purchased a 2000 sq. ft. sporting goods store in what is now 451 N. Main Street. In 1949 the store was sold to Art & Marie Stapel, thus starting the family business that we know today.

"A friend of mine from Kansas who owns a chain of True Value stores came up to see our business once," said Jim Stapel. "He said 'you probably don't know what you have here in downtown Oshkosh. It's amazing that you've been able to keep your downtown with its historic buildings and vibrant community going.'"

True to their mantra that philanthropy is about more than just being financially charitable, as buildings from the Time Theater down to Church Avenue became available, Jim's dad would purchase them. Afterwards, they were rented out at generous rates so that others could try their hand at business. As Jim puts it, "Downtown has been really good to our family, and we'd like to see others get that chance too."

"My family loves what we do. Dad would joke that he only worked half days (meaning 7AM to 7PM), and that would always make folks smile," Jim recalled.

*"In the '50s and '60s my dad spent a lot of time working with business owners along Main Street to make sure their businesses could keep going. That gift of my dad's knowledge, skills, and time to make sure they were successful – that was real philanthropy."*

The entire Stapel family wishes to express their gratitude to their customers and fellow business owners over the last nearly seven decades. "That's one of the exciting things about downtown Oshkosh – some of the businesses are intergenerational – you've worked with the same people, you've known the same people, you've had the same neighbors - that's really special. You help each other out like a neighbor should."

"Philanthropy is so much more than just giving money," proclaimed Jim one last time. "If we all give of our time, talent, and treasure in service above self, there's no limit to what our community can accomplish." For **good**. For **ever**.



*"My family loves what we do. Dad would joke that he only worked half days (meaning 7 AM to 7 PM), and that would always make folks smile."*

– Jim Stapel

## BUILD YOUR LEGACY

Gifts made through the Community Foundation establish funds that become your personal legacy of giving, in perpetuity. Funds can support specific agencies, fields of interest, scholarships, or be unrestricted in their purpose. Philanthropy knows no bounds.

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Oshkosh Tavern League  
Oshkosh Chamber Of Commerce  
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# Partners in Philanthropy

## Working with Financial Advisors to Secure Your Legacy of Giving

"Helen and John Schuster did a lot for their family and community while they were living, and now, thanks to their foresight and smart planning, their estate carries on that work," said Nick Jensen, Financial Advisor with Edward Jones. "The Schuster family gave in many areas throughout the community. They were quintessential down-to-earth people, and it was a sincere pleasure to build a relationship with them for over 25 years."

The Schuster estate was set up prior to Helen and John passing. Nick helped them get everything in order so that their legacy would live on. Posthumously this money is managed much like it was within their lifetime. You only take out enough money that you need to live with, and that way you continue to let the principal grow, ensuring support in perpetuity for any organization you were passionate about.

"When people come to me I don't act as an estate attorney, but rather I get to know what their feelings are for our community. I learn what they're impassioned by currently, and connect those passions to opportunities within our community whenever possible."

Nick went on further, "It's my privilege to help them identify broad areas that they're interested in, and maybe even make some suggestions for things that they might not be aware of that are happening. I gather those interests and then approach the Community Foundation."

Advisors partner with the Foundation and share that they have a client interested in a particular cause. Then, Community Foundation staff will reach out and educate the client on causes and projects going on in our area that align with their philanthropic passions. We showcase what those causes have done in the past, what they're working on now, and what your gifts can allow them to do in perpetuity.

"It's rewarding to help clients know that after they've passed away the money that they've worked for, invested, and saved continues to be used for good," noted Nick.

*"John loved to read Western novels, but he needed large print books. Recognizing that there would always be members of our community with vision impairment, a portion of the Schuster estate was given to the Oshkosh Public Library for the purpose of providing large-print and audio books."*

Thanks to realistic planning and mindful foresight, the things that John and Helen cared for will always help others in our community. For **good**. For **ever**.



*Marcy Shukis, of Oshkosh, is a regular library-goer who uses books made possible through the Schuster estate.*

## SOUND ADVICE

Charitable giving doesn't have to be difficult! Financial advisors are excellent partners who can help bridge the gap between causes you care about and needs in the community that align with your interests. In partnership with your financial advisors, the Community Foundation is here to help elevate your philanthropic goals to the next level.

Oshkosh Southwest Rotary  
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David and Dorothy Zerbe  
David and Kathleen Zillges

The Foundation makes every effort to ensure that all names are spelled correctly and listed accurately. If there are any omissions or errors in spelling or listing, please call 920-426-3993 so that we may correct our records.

# Community Partnership Awards

Every year we take a moment during our annual donor appreciation event to recognize organizations and individuals within our community who go above and beyond the call of philanthropy.

This year we present the 2017 Partners in Philanthropy award to BID Downtown Oshkosh Group. From the installation of bike racks, flower pots, and free parking, to their recruitment and branding efforts and more for our city, we appreciate all that they've done.

For the second year in a row, the John E. Kuenzl Foundation has made a matching gift to the Good Samaritan Fund. With our community's help, we are again seeking to raise \$150,000 to match this gift.

The Good Samaritan award is likewise in its second year. This year we are proud to present this award to the entire Castle Family. Their legacy of philanthropy and leadership within our community have helped shape Oshkosh into the city that it is today.

# Audited Financial Statements

Assets	2017	2016
Cash & Investments	\$107,527,774	\$96,959,655
Receivables	1,856,443	2,030,899
Property & Equipment	616,526	642,101
Other Assets	<u>356,701</u>	<u>547,026</u>
<b>Total Assets</b>	<b>\$110,357,444</b>	<b>\$100,179,681</b>

Liabilities & Net Assets	2017	2016
Agency Funds	\$39,531,370	\$36,369,158
Payables	1,628,492	1,486,218
Long-Term Debt	1,265,374	1,144,701
<b>Net Assets</b>	<b><u>67,932,208</u></b>	<b><u>61,179,604</u></b>
<b>Total Liabilities &amp; Net Assets</b>	<b>\$110,357,444</b>	<b>\$100,179,681</b>

Contributions*	2017	2016
	<b>\$7,340,425</b>	<b>\$7,262,800</b>

Distributions	2017	2016
Grants/Scholarships	\$5,169,774	\$3,759,295
Agency/Designated	<u>886,905</u>	<u>814,017</u>
<b>Total Grants/Scholarships</b>	<b>6,056,679</b>	<b>4,573,312</b>
Program Expenses**	<u>1,081,644</u>	<u>1,665,810</u>
<b>Total Distributions</b>	<b>\$7,138,323</b>	<b>\$6,239,122</b>

\* Contributions per the audited financial statements exclude contributions to agency funds, in accordance with accounting standards. References to contributions in the text and charts of the Annual Report represent total contributions, including those to agency funds.

\*\* Program expenses are funds paid directly to a vendor for nonprofit organizations and special community projects.

## GIVE NOW

Use the enclosed envelope.  
Identify a fund on the enclosed insert.  
Give online at [www.OshkoshAreaCF.org](http://www.OshkoshAreaCF.org)

## GIVE LATER

Leaving the Foundation in your will or estate plan can reduce your estate taxes and ensure your legacy lives in our community.

Contact us for bequest language and gift details at 920-426-3993 or [info@OshkoshAreaCF.org](mailto:info@OshkoshAreaCF.org).

### Sample Language for a Bequest to Establish a Community Impact Fund

"I give to the Oshkosh Area Community Foundation, a Wisconsin nonprofit public charity, (insert the percentage of your estate, trust or sum of money) OR (all my right, title and interest in the following described property \_\_\_\_\_). This gift shall be used to establish the \_\_\_\_\_ Fund, a Community Impact Fund, and shall be invested and distributed at the sole discretion of the Oshkosh Area Community Foundation's Board of Directors."

## Boards of Directors & Staff

### OSHKOSH AREA COMMUNITY FOUNDATION Board of Directors

Jason Hirschberg, *President*  
Victoria Beltran  
Tom Castle  
Dave Elbing  
Jason Feltz  
Peter Lang, *Vice President*  
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Cathy Luther  
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Lorrie Keating Heinemann  
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Sheldon Lasky  
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Sam Sundet  
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Lyle Plagenz  
Steve Sorenson  
Destina (Dusty) Walker

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Kelly Angell  
Andrew Beiser  
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Kristin Sullivan  
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Julie Maslowski  
Amanda Potts  
Denise Prehn  
Jusy Seibold  
Ann Trembly

### OSHKOSH AREA COMMUNITY FOUNDATION Staff

Bill Wyman, *President and Chief Executive Officer*  
Dawn Clark, *Executive Assistant*  
Ann Foster, *Operations Coordinator*  
Cheryl Fowler, *Education Coordinator*  
Karlene Grabner, *Director of Donor Services*  
Debbie Herman, *Accountant*  
Katie Neitzel, *Development and Communications Coordinator*  
Amy Putzer, *Director of Programs*  
Jennifer Sheahan, *Director of Finance and Administration*  
Kristopher Ulrich, *Director of Marketing and Communications*

**Credits** Photography: Erin Ashley, story photos; Denver Scott, Oshkosh Farmers Market photo  
Perspective Renderings: MSA Professional Services; Kahler Slater, Inc.  
Design & Layout: 44° North Advertising & Design  
Printing: Independent Printing Co., Inc.



Serving Winnebago County, Waushara County, Green Lake County and Ripon, along with our affiliates:



Excellence, Accountability, Impact.  
Accredited in compliance with the National Standards for U.S. Community Foundations—the highest standards for philanthropic excellence.

