

# Learn | Invest | Engage IN OUR COMMUNITY



2016 ANNUAL REPORT TO THE COMMUNITY

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

# Welcome

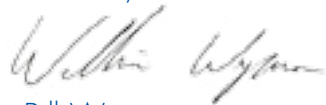
The Oshkosh Area Community Foundation is here to help create meaningful change in our community and to be sure our donors' legacies live on.

Giving is a rewarding activity, but when you give with an organization like the Foundation, the meaning and impact is so much greater.

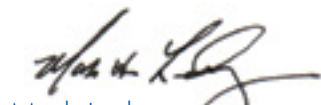
It's not just about giving and granting, it's a whole lot more. The Foundation helps organizations grow and become stronger through workshops and coaching. Sometimes, it's a grant that's needed, but other times we know that giving the community skills that are needed to become stronger is equally as important.

We hope that by reading this annual report, you will think about what community means to you and how you can give back.

Sincerely,



Bill Wyman  
President and CEO



Mark Lasky  
Chair, Board of Directors

# 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 communities. 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. We serve the communities within Winnebago County, Waushara County, Green Lake County and Ripon.

## Our Mission

Strengthen our communities.

We accomplish this through:

- Leadership and funding to address current and emerging needs
- Collaboration and partnership with donors or others to ensure lasting impact
- Outstanding stewardship and inspired philanthropy

## YEAR AT A GLANCE

1,382 grants totaling \$4,573,312

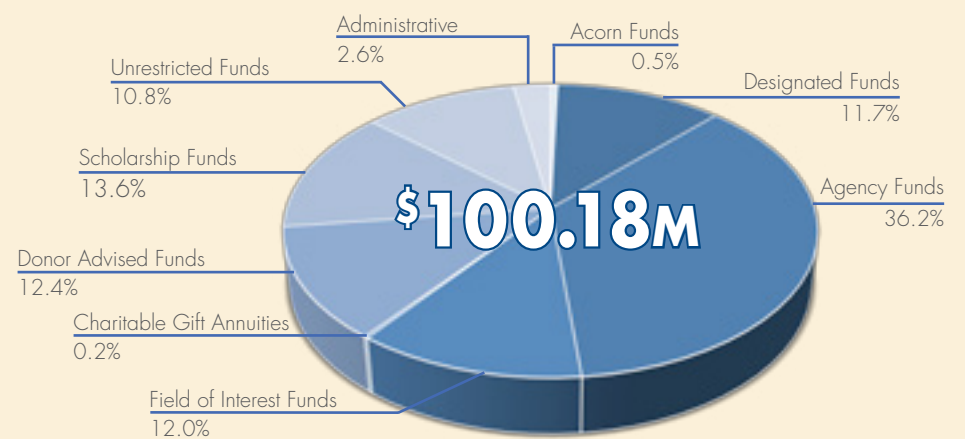
6,012 contributions totaling \$8,960,792

45 new charitable funds, for a total of 803

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).

## ASSETS BY FUND TYPE

Total Assets: \$100,179,681



## 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  
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  
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  
Hiwelo 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 Marchn 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 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 Ruddy 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)  
Mildred M. and Edward W. Baar Youth and Education Fund  
Brandon J. Backus Fund  
Birmingham Fund  
Willard and Val Carlson Memorial Fund  
MJ Castle Fund  
Thomas and Trisha Castle Fund  
Jean I. Caudle Fund  
Robert J. Christman Fund  
Corcoran Family Fund  
Howard and Alice Curler Memorial Fund  
Linda and Tim Dempsey Fund  
N. L. Dirlam Fund  
Driftwood Fund  
Dumke Family Fund  
Katrina Rose and William James Edwards Fund  
Cameron Victor Gassere 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  
Russell J. "Rusty" Johnson Fund  
Patrick Keesler and Eileen Connolly-Keesler Fund  
J. J. Keller Foundation Fund  
Robert and Linda Koch Fund  
Koepler 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  
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  
Meizig Conservation Fund  
Monnett Family Fund  
The John and Jane Mosling Fund  
Robert and Carol Niendorf 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  
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  
Paul (PJ) Rottman Fund  
Janet Scalpone Fund  
Dennis and Gail Schwab Fund  
**Seibold Family Fund**  
Tom Shepeck Memorial Fund  
Stapel Family Fund  
Kenley and Carole Steinert Fund  
Sullivan Schumacher Fund  
Take 5 Fund  
Mary J. Tank Memorial Fund  
TFL Fund  
Jeff and Ann Trembly Fund  
Mark D. and Christine G. Trout 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  
Bill and Beth Wyman Fund  
Thomas and Shirley Wyman Fund  
Wayne and Suzanne Youngwirth Endowment Fund



## About the Cover

The Foundation understands the importance of having strong, healthy neighborhoods. We also believe in the power and potential of individuals and organizations to change communities, and that's why we are proud to support numerous neighborhood revitalization efforts throughout our community.

Thanks to a partnership with the City of Oshkosh, the River East Neighborhood Association was the recipient of a Great Neighborhoods Grant in 2016. The funds will support the redesign of the William Waters Plaza and trash cans at Riverside Park.

Photographed during the city's Neighborhood Night Out celebration in August, members of the Association's Steering Committee include (from left), Tammy Hackett, Richard Peerenboom, Kathryn Webb, John Scheelk, and Tracy McKelvey-Kamel.

# Investing In Our Communities: Progress

Thanks to many gifts of time and financial resources, we are making progress to address unmet needs and improve the quality of life in our communities.

**Oshkosh Community YMCA Bridge to the Future:** After a decade of revitalization in Oshkosh's downtown, the Foundation is proud to have provided a \$1 million grant to the Oshkosh Community YMCA's capital campaign to renovate its downtown facility. The Foundation's support for this project addresses not only the need for a welcoming, accessible social hub in our downtown region now and for generations to come, but also helps this longstanding institution meet the needs of its customers.

**Neighborhood Grants Program:** Through a strong partnership with the City of Oshkosh, the co-investment with individual donors and gifts to the Taking Root Fund, the Foundation provided \$100,000 in support for healthy neighborhood initiatives. Leveraged with nearly \$150,000 in support from the city's capital improvement budget, grants were awarded in 2016 to support beautification projects spearheaded by numerous neighborhood associations.

**Mental Health, Wellness:** The prevalence of mental health and behavioral health issues facing our communities demands a multipronged approach across sectors. The Foundation was proud to provide financial resources to support the following initiatives:

**Wellness Screening:** Samaritan Counseling Center of the Fox Valley expanded emotional wellness screening to high school students in Oshkosh, Omro and Winneconne.

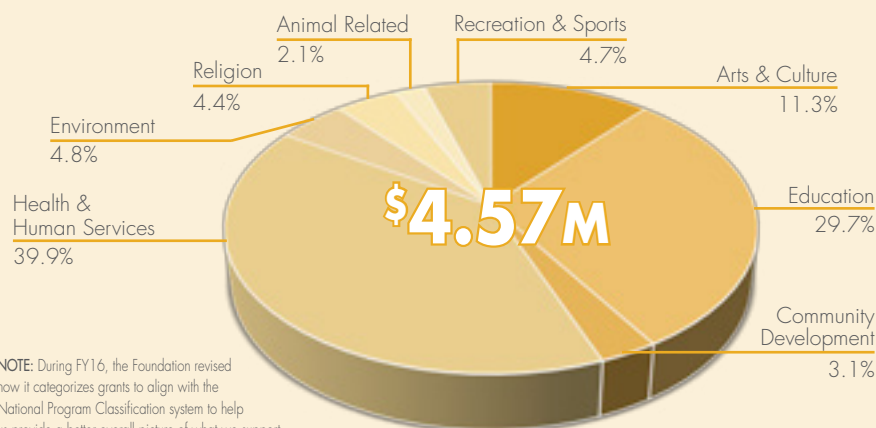
**Catalpa Health:** Increased access to mental health therapy for children and their families through expansion of the Oshkosh treatment center and a new partnership with the Boys & Girls Club of Oshkosh.

**Substance Abuse/Crime Prevention:** Oshkosh police gained mental health training programs and investigation equipment to help in the fight against the heroin epidemic. Alcohol and drug prevention programming from Party.0 expanded its reach.

**Taking Root, A Campaign to Beautify Oshkosh:** Five new welcome signs at the major highway entrances to the city of Oshkosh greet visitors and residents alike with a healthy dose of community pride. The 12- to 14-foot lighted signs were funded by the Taking Root Fund, a beautification effort that began in 2010.

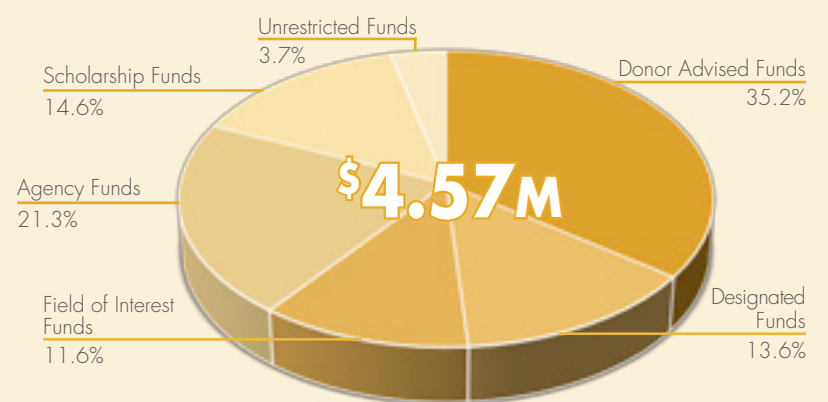
In addition to the signs, the public-private partnership with the City of Oshkosh has resulted in the planting of 3,000 trees in public spaces throughout the city, as well as landscaping in city parks and other properties.

## GRANTS BY PROGRAM TYPE: \$4,573,312



NOTE: During FY16, the Foundation revised how it categorizes grants to align with the National Program Classification system to help us provide a better overall picture of what we support.

## GRANTS BY FUND TYPE: \$4,573,312



### 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  
Cerebral Palsy Fund: Advocating Rights & Choices for People with Disabilities  
Cerebral Palsy of Mideast Wisconsin, Inc. 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  
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

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  
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 Kuettnr Endowment Fund  
Leach Amphitheater Fund  
Little Oshkosh Community Playground Fund  
Lourdes Academy Elementary Construction 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

NAMI of Oshkosh Fund  
Neeah-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 Oellein 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 Local Project 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. Rudy 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 Thea Care At Home Hospice Program  
John and Helen Schuster Lourdes Academy Fund  
Seldon 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**  
Winnebagoland Focus Fund  
Winneconne Historical Society - Geraldine Driscoll Memorial Fund  
WPS Fund  
YMCA Endowment Fund  
**Charitable Gift Annuity Funds**  
David and Carol Cameron Charitable Gift Annuity Fund  
K. Jeanne Metzger Charitable Gift Annuity Fund for Women  
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

Funds List continued on Page 4



# Roots Run Deep

## Donation of farm land gives opportunity to continue, grow family's charitable legacy

As a child, Marianne Ivey remembers wading in a small stream and admiring the webs of garden spiders under willow trees on her family's farm land along County Road E in Omro. Her father, Bert Formiller, taught her to love this land, where she and generations of her mother's family were raised. The stream and willows were such a special memory, Marianne had an Oshkosh artist create a painting of them. "I always will find a place for it, wherever we live," says Marianne.

Life is about change. With the passing of Marianne's mother, Virginia Formiller in 2008, a few decisions were left to be made. She and her brother John, each with careers and children in other states, were unlikely to return to the family homestead. With careful planning and expert advice, the land was gifted to the Foundation and later was sold to a local farming family. The proceeds from the sale created the Marianne and Tom Ivey Charitable Fund, a Donor Advised Fund.

This common form of charitable giving allows the donor to lessen their income tax while providing an opportunity to give back to their community. The expert advice from attorneys, advisors and the Foundation was helpful, Marianne says, though it was still difficult to let the property go.

Her parents' families have deep roots in the Oshkosh area. Bert, a World War II veteran and recipient of the Purple Heart, purchased the farm from Virginia's father, William Sipple. The land abstract shows that William and his brother John purchased the property from their mother, Marianne says. Bert's family lived in the Berlin and Winneconne area, where there is a road bearing the Formiller name.

*"I believe in giving back and I think my mother certainly did. She took the first step," says Marianne. "We will continue to honor what has been important to our family for a long time."*

Virginia Formiller paved the family's path in philanthropy years before the land was gifted when she created the Virginia Formiller Family Scholarship, which benefits Omro High School students entering education, health care or social service fields. Virginia was a beloved educator for 40 years in Oshkosh and Omro.

"My mother was a dedicated educator," says Marianne. "She really cared for her students and they for her. I think some of her students depended on her for advice and as a stable adult in their lives when things were hectic in their own homes."

Virginia emphasized the importance of education to her children. Marianne and John both achieved college degrees – Marianne becoming a pharmacist and John a social worker.

Marianne, now retired, and her husband, Tom, a retired physician, plan to use their charitable fund to honor their family's values.

*"I encourage other people to think about donating land or property, and to get expert help. (OACF) was very helpful...there often is no road map to what you wish to do and you have to work it out together."*

– Marianne Ivey

## GIFTS OF REAL ESTATE

Gifts of real estate can help people fulfill charitable dreams while experiencing maximum tax benefits. These types of gifts can include land, a personal home, business and commercial property, vacation homes and condos.

Continued from Page 3

### 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  
Little White Schoolhouse, Inc. 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 Capital Improvement 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  
John Kapral Memorial Scholarship Fund  
Kemp Family Scholarship 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  
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 Past 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  
Arline 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  
Herzog Family Fund  
Chryst Hyde Fund  
JES Fund

# Giving Just Comes Naturally

## Youngwirths build legacy of community support

Back in the day when Wayne and Suzanne Youngwirth were youngsters in Oshkosh, a strong work ethic was something people celebrated. The upbringing they experienced has instilled in them a drive to do well for themselves and for their community. It's something that just comes naturally.

"That's what makes life go 'round," says Suzanne, a retired nurse. "We have gotten a lot from this community, and we give back."

Throughout their 38 years together, the Youngwirths have given generously of their time through community organizations and programs. The Wayne and Suzanne Youngwirth Endowment Fund, a Donor Advised Fund, allows the couple to provide financial resources to charitable causes they're passionate about – things like downtown revitalization and youth mentoring. The Youngwirths built the fund over time, starting from an Acorn Fund in 1996 (the Foundation's first).

Through their estate plan, the Youngwirths' have directed a large portion of their investment portfolio to be gifted to the Fund after they're gone, ensuring their legacy of support will continue.

*"I just love Oshkosh and I love the history," says Wayne, a manufacturing representative with his firm Youngwirth & Associates. "I've traveled extensively for years, including Europe. We have had several opportunities to leave, but we're staying."*

The Youngwirth (originally spelled Jungwirth) family immigrated from Bohemia (Czech Republic). Wayne's great-grandfather sanded caskets at the Buckstaff Co. while his great-grandmother tended to a brood of 17 children. Wayne's grandfather, Frank "Butch" Youngwirth, was the oldest. A tall, intimidating man, Butch amassed a fortune as a bootlegger during the Prohibition era, running at least six taverns in Oshkosh. He gambled his earnings away and died penniless, Wayne says.

Wayne's father chose the opposite path in life, working as a janitor in Oshkosh schools in addition to a myriad of side jobs. "I grew up on the South Side, where everyone went to work at 7 and came home at 3:30," says Wayne. "My dad was home every night. We lived in a very nice house, very well kept up and he taught us principles, that work was part of the social fabric."

Each of the children had jobs from an early age. They were paid for their work, but Wayne's father insisted that 50 percent went into savings. "At age 16, you got that money," says Wayne. "I still have mine – it's buried somewhere in my investments."

Wayne believes strongly that his upbringing led to his success, and the success of each of his siblings, several of whom have owned their own businesses and are sought after experts in their fields.

He and Suzanne are proud to invest in the community that has given so much to them. "You always want your hometown to do well," Wayne says.



*"Failure was not an option. (My father) never said that, but we knew it and you didn't want to embarrass him."*

– Wayne Youngwirth

## CHARITABLE BEQUEST

Leaving the Oshkosh Area Community Foundation in your will or estate plan offers many benefits. A charitable bequest may reduce your estate taxes, and will ensure your legacy lives on in our community, forever.

Alexandra K. Koeppler Fund  
Kaitlynn A. Koeppler Fund  
Kristen Fund  
Larson Family Fund  
Helaine Rudoy Lasky Fund  
Mary C. Leitch Memorial Fund  
McDonald Girls Fund  
Susan K. McFarlane Fund  
Jeanne and Quintin Metzger Fund  
Nelson Women's Fund  
Ruth A. Nordhaus Fund  
SHE<sup>3</sup> Fund  
Dawn Johnson-Smith Fund  
Marcia Smith-Leslie Fund  
Stadtmueller-Kilp Family Fund  
Vette Girls Fund  
Wagner Women Fund

### Giving Circle Funds

Belles, Books and Candor Fund  
G.E.M.S. (Giving Empowers My Sisters) Fund  
The Wine Ladies Fund  
Women in Medicine Fund  
The Women's Division 50th Anniversary Endowment Fund

### Designated Funds

Mary Anhaltzer Fund  
Friend of the Women's Fund  
Ruth A. Nordhaus Designated Scholarship Fund  
The Service League Fund  
Women's Fund Program and Operating Fund

Funds established from July 1, 2015 to June 30, 2016 are listed in bold.

### FY16 GIFTS TO SUPPORT OUR WORK – Contributors of Gifts Totaling \$500 or More are Listed

#### A

Acoustic Ceiling Products, LLC  
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A.F. Gelhar Co., Inc. Industrial Sands  
Agnesian HealthCare, Inc.  
The Alberta S. Kimball/Mary L. Anhaltzer Foundation  
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Alliant Energy Corp. Services, Inc.  
Alliant Energy Foundation, Inc.  
Alro Steel Corp.  
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American Legion-Giles Luce Post 364  
American Legion Kasierski-Kozlowski Post No. 366  
ANVETS Ladies Auxiliary #7  
Doug and Sue Angell  
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Anonymous Donors (3)  
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Associated Bank-Neenah  
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Assurance Title Services, Inc.  
Aurora Health Care  
William and Nancy Austen  
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#### B

Brandon Backus Memorial Golf Outing  
Badger Mining Corp.  
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Michelle Bauer  
Michael and Candace Beckett  
Beez Electric, Inc.  
Beiser Realty, LLC  
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Bemis  
Bergstrom Automotive  
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Charles Besser  
Best of Seven, LLC  
John and Gayle Bittner  
Marie Betsy Blazek  
Beverly Bloechl  
Blue Door Consulting, LLC  
Burleigh Blust  
BMO Harris Bank-Oshkosh  
BMO Harris Bank-Ripon  
Bourne Logistics Management, Inc.  
Theodore and Karen Bowen  
Boys & Girls Club of Oshkosh, Inc.  
Steven Braun and Amy Pollock  
Michael Brisben and Melanie Jansen  
Joel and Janie Brockman  
Marjorie Brooks  
BTI Special Commodities, Inc.  
James Buck  
Dr. S. Mark Bullard and Dr. Karen Gremminger  
Business Lending Group, LLC  
Butzin-Marchant Funeral Home, Inc.

#### C

Nancy Camber  
John and Gail Cameron  
Richard and Marilyn Campbell  
Caramel Crisp & Cafe, LLC  
Richard and Carolyn Carlson  
Thomas and Trisha Castle  
Cerebral Palsy of Mideast Wisconsin, Inc.

CG Schmidt Construction  
Charlotte Palmer Phillips Foundation, Inc.  
Robert and Kristin Charrier  
Rich Chiappe  
Chief Liquid Waste, Inc.  
Children's Miracle Network Miss America Contestant Fund  
Choice Bank  
City Center Associates, LLC  
City of Green Lake  
City of Omro  
City of Oshkosh  
Clarity Care, Inc.  
Curt and Patricia Clark  
CN  
Lee D. Coleman  
Community First Credit Union  
Community Foundation  
for the Fox Valley Region, Inc.  
William and Anne Conzemius  
Igancio and Deborah Cortina  
Dan Cotter  
CR Meyer  
Janet Crook  
Dr. Joann Noe Cross  
Culver's of Oshkosh No. 2  
William and Sally Cuttill

#### D

Timothy and Cheryl Dahlstrand  
Richard and Christine Damm  
Jeanne Dandrea  
Darford Historical Society  
Michael and Beth Dempsey  
Timothy and Linda Dempsey  
Dental Design Studio, Inc.  
Dr. Robert and Nan Devermann  
DGW Auctioneers, Inc.  
Diedrich Agency, Inc.

Divine Passage Funeral Home  
John Dobbins  
Lisa Dohr  
Tony Dolgner  
Jon and Cassandra Dorn  
Downtown Oshkosh Business Improvement District  
Drexel Building Supply  
Susan Drexler  
Dr. Michael and Darcy Duffy  
Andrew and Allison Dumke  
Arthur Dumke  
Peter Dunwiddie  
The Estate of Leo M. Duwe Jr.  
Duxstad & Bestul, SC  
Roy and Susan Duxstad  
James and Norma Jane Dyer

#### E

EAA  
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Early Bird Kiwanis Club of Ripon  
Ebco, Inc.  
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Dr. Calvin and Janis Edwards  
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David and Susan Elbing  
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Emmeline Cook Elementary School PTO  
Helen Evans  
William and Robin Evans  
Evergreen Retirement Community  
Execu Travel of Wisconsin, Inc.  
Eye Candy Fireworks Club, LLC

Donor List continued on Page 6



## A Gift to the Community

Oshkosh woman's legacy of support inspires sister's philanthropy

A portrait of a lovely woman from the 1920s hangs in a spare bedroom at Janice Pennau's home. The original painting titled "Miss Julia Due," by local artist Merton Grehagen, is stored at the Oshkosh Public Museum, where it was displayed for 40 years.

Janice would watch in adoration as her sister, Julia Due, 10 years her senior, followed a rags to riches path in life. Starting as the daughter of poor, Danish immigrants, Julia earned her nursing degree and married a well-to-do entrepreneur. In her later years, Julia gave millions of dollars of the wealth she and her husband, Ralph Petersen, amassed to local organizations, including the Oshkosh Community YMCA, Salvation Army and the Oshkosh Area Community Foundation.

The Julia and Ralph Petersen Fund, a community impact fund, has supported evolving needs at the Oshkosh Area Community Pantry, Tri-County Community Dental Clinic, Winnebago Literacy Council and the Oshkosh Seniors Center. This past year, the fund helped support a \$1 million gift to the Oshkosh Community YMCA renovation, Oshkosh's new welcome signs and an ADA-compliant canoe launch on the Fox River.

*"I think that (Julia) would be delighted. I think she would be very happy with that. I know I would," says Janice, who admired her sister's gifts so much that she created the Karl and Janice Pennau Fund to support vision and eye care for children in Oshkosh.*

*Pictured here is Janice Pennau. The framed painting of her sister, inset above right, titled "Miss Julia Due" is owned by the Oshkosh Public Museum.*

*"We were quite different, yet the same. I think we each had a desire to help our children and grandchildren, too, but each of us has given back in our own ways."*

— Janice Pennau

Janice was the youngest of three girls, each born 10 years apart to Julius and Marie Due. With no more than a fourth-grade education, the Dues were poor, but worked hard and sent each of the girls to college. Ellen, the oldest, became a teacher. Janice earned degrees in history and business.

Julia met Ralph Petersen, an Illinois man, while attending the University of Wisconsin. During his career, Ralph amassed a fortune working in mergers and acquisitions across the United States. He was credited with saving the Innisbrook golf resort in Florida from financial failure in the 1970s. For many years, Julia and Ralph lived in Berlin, where they raised two children, and later moved to a home on Lake Butte des Morts. When Ralph died in 1991, Julia had no idea of the couple's riches.

Despite the age difference, Janice had a special bond with Julia, and sees now that they both have a desire to give back to the community that led them to successful lives.

## COMMUNITY IMPACT FUNDS

Community Impact Funds are the lifeblood of the Foundation that provide support for a broad range of local needs – both current and future needs that are unknown and unanticipated when such a donation is made.

Continued from Page 5

**F**  
 Fanlight Corp.  
 Fast Club of Oshkosh, Inc.  
 Carol Fenrich  
 Sally Feryan  
 Festival Foods  
 Dennis and Sandra Filkins  
 First National Bank-Berlin  
 First National Bank-Fox Valley  
 First Weber Group Foundation, Inc.  
 Michael and Amy Foley  
 44 North Advertising & Design, LLC  
 Douglas and Dr. Shelda Fosso  
 Carolee Lee Foust  
 Patricia Fowler  
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 Fox Valley Chapter of Credit Unions  
 Fox World Travel  
 Kennard and Susan Friedman  
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 Friends of the Oshkosh Area, Inc.

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 Gannett National Shared Service Center  
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 Green Lake Rotary Club District 627  
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 Legacy Private Trust Co.  
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 Neenah Girls Basketball Club, Inc.  
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 Neenah Joint School District  
 Neenah Quarterback Club  
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**O**  
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 Omro High School Athletic Department  
 OptiVision, LLP  
 Margaret Osborn  
 Oshkosh Area School District  
 Oshkosh Area United Way  
 Oshkosh Chamber Of Commerce  
 Oshkosh Coil Spring, Inc.  
 Oshkosh Community Credit Union  
 Oshkosh Community YMCA

# Credit Where Credit is Due

## Heaney's philanthropy recognizes family, friends who shaped his upbringing

Bill Heaney could be described as a conversationalist and a thoughtful academic, whose mind is an encyclopedic treasure of historical nuggets. Heaney is an anthropologist who has traveled the world for his research and taught at universities in the United States and abroad. As a member of a three-generation Oshkosh newspaper family, he has never lost touch with his hometown.

He credits his upbringing with influencing his worldly curiosity and desire to help others. Heaney is an advisor to the Heaney Family Fund, the foundation's first Donor Advised Fund, created in 1995. Recently, he has created funds to honor individuals who influenced his youth.

*"Where I benefited most was from the city itself – be it the teachers or police or neighbors or schoolmates... I remember it fondly. Wherever I've been, and I've been overseas and traveled a bit, I've always felt that way."*

His roots in the community, and with the Foundation, are intertwined with their histories. Heaney's grandfather, Oscar J. Hardy, was a long-time publisher of the Oshkosh Daily Northwestern, the city's daily newspaper, founded in 1860. Hardy, a paperboy who caught the attention of owner Col. John Hicks, moved up through the ranks and took over the paper after Hicks' death in 1917. Hardy was one of 10 forward-minded community leaders who created the Oshkosh Area Community Foundation in 1928.

Heaney's father, Samuel, was in medical school when Hardy, his father-in-law, asked him to join the newspaper business. Samuel moved to Oshkosh in 1948 with his wife, Susan, and Bill, then a toddler (a second child, Curtis, came shortly after), to run the Northwestern with A. Thomas Schwalm until it was sold in 1998.

Memories of life in Oshkosh have inspired Heaney's philanthropy. He has created funds to honor:

**Oscar and Gertrude Hardy** – Heaney's grandparents. "(Oscar) built the Oshkosh Northwestern building in the midst of the Depression to show his support for and his belief in the local economy. I am very proud of him for what he accomplished," says Heaney.

**Ruth Kossel** – a practical nurse who watched after Bill and Curtis, and became a lifelong family friend "who taught us both to respect every person's individual character and to show respect for their personal dignity," he says.

**Norbert and Hope Vette** – the Heaneys' neighbors on Hazel Street and owners of Vette's Sportshop. "Having a sporting goods store virtually next door, was a dream-come-true for a young man aged 5 to 12," says Heaney.

Heaney says that through his philanthropy, he is "saying thank you for the lifelong skills, interests and awareness that family friends have given me, not only pride and a sense of belonging...but also the foundation for the kind of persons we've all become."



*"I feel very proud and thankful for what my mom taught us so long ago about the importance of giving back and for my father's contribution as a board member to several organizations."*

– Bill Heaney

## BUILD YOUR LEGACY

Gifts made through the Foundation establish funds that become your personal legacy of giving, in perpetuity. Funds can support a specific agency or agencies, a field of interest, scholarship or be unrestricted in their purpose.

Oshkosh Convention & Visitors Bureau, Inc.  
Oshkosh Corporation Foundation, Inc.  
Oshkosh Corp.  
Oshkosh High School Class of 1970  
Oshkosh Jaycees, Inc.  
Oshkosh Mid-Morning Kiwanis Club  
Oshkosh Opera House Foundation  
Oshkosh Public Museum  
Oshkosh Rotary Club  
Oshkosh Saturday Farmer's Market  
Oshkosh Southwest Rotary  
Oshkosh Tennis Association, Inc.  
Oshkosh Tool Co., Inc.  
Oshkosh Youth Hockey Association

**P**  
The Paine Art Center and Gardens  
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Rogers Publishing  
The Mark & Debi Rolling Charitable Foundation  
Charles and Brenda Rolli  
Ron Krizan Memorial Golf Outing  
Rotary Club of Ripon  
Rotary Club of Waupun  
Joseph and Rebecca Rothbauer  
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Bruce and Nancy Rounds  
Monea Rowe  
Dr. Dean Rudyoy  
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Beverly Scheuermann  
Susan Spanbauer Schmidt  
Randall and Jane Schmiedel  
Father John Schmitz  
Jeff Schnker  
John and Vicki Schorse  
June Schroeder  
Jane Schueler  
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Significance Foundation  
Silver Star Brands  
Simply Snackin  
Thomas Sitter  
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Snitz Club Baseball for Oshkosh  
Solutions Recovery, Inc.

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St. Vincent De Paul Thrift and Furniture Store  
Florence Stadler  
Gerald Stadmueller and Catherine Luther  
Joseph and Mary Ellen Stadmueller  
Arthur Stamm  
Jessica Wagner Stanwix  
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STEP Industries, Inc.  
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Strang, Patteson, Renning, Lewis & Lacy  
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Lori Stubbe  
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**T**  
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Thrivent Financial for Lutherans Foundation  
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UW Oshkosh Foundation, Inc.

**V**  
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Randy and Linda Van Ness  
Richard and Suzanne Vanderloop  
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Gladys Veidemanis  
Verve, a Credit Union  
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David and Cheryl Vierthaler  
Alan Vlach and Ann Luther  
von Briesen & Roper, s.c.  
Ruth Vorpahl

**W**  
Margaret Wachtel  
Wal-Mart Store No. 1430  
Randolph and Irene Waller  
The Waters Enterprises, LLC  
Waukesha County Community Foundation  
WEA  
Donald and Judith Weber  
Dr. William Weber  
Webster Stanley Elementary School PTO  
Jack Weissling  
Patti Weissling  
Anthony Weitenbeck  
Wells Fargo Bank, N.A.  
Wesco Distribution, Inc.  
The Estate of Jeanette Westfahl  
Dr. Robert and Christine Weston  
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Joseph and Mary Wiedenmeier  
Thomas and Patricia Wildman  
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Robert and Margaret Wilms  
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Winnebago County Sheriff's Office  
Winneconne Christian Fellowship  
Winneconne Community School District  
Thomas and Debra Wirtz  
Wisconsin Department of Tourism  
Wisconsin Masonic Foundation  
Wisconsin Public Service Corp.  
Wisconsin Tractor, LLC  
Witzke Electric, Inc.  
Terrance and Eve Lynne Wojahn  
Suzanne Wolfersdorff  
Women for Veterans  
Women's Fund for the Fox Valley Region, Inc.  
Wurth Adams Nut & Bolt Co.

**Y**  
Gary and Sandra Yakes  
Dr. Frederick Yeo and Roxanna Strawn  
Young, Schuster & Maslowski, LLP  
Timothy and Judith Young  
Youngwith Associates, LLC


**Z**  
Randall and Mary Zenner  
Andrew and Deborah Zeratsky  
William III and Alyson Zierdt  
William Zimar and Susan Neitzel  
Jane Zimmerman

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.

# Our Financial Report

We are pleased to report the Foundation's financial position is strong. An independent audit has confirmed the fair presentation of our financial results and the quality of our financial controls for the 2016 fiscal year.

The Foundation and its experienced Investment Committee have closely examined the structure and management of our portfolio to focus on long-term growth. As a result, the Board of Directors accepted a recommendation to change our investment advisory provider. We believe this change will improve the Foundation's ability to serve our communities today and provide good stewardship for growth of the funds entrusted to us.



Bill Wyman  
President and CEO



Catherine Luther  
Treasurer, Board of Directors

## Investment Results

The Community Foundation's investment pool is invested by several different money managers, including local trust banks and outside securities firms. A list of those banks and firms, as well as summary investment reports, updated quarterly, are available on our website at [www.OshkoshAreaCF.org/about\\_f.cfm](http://www.OshkoshAreaCF.org/about_f.cfm).

## Financials available upon request

As a public charity, the Oshkosh Area Community Foundation Corporation adheres to the highest standards to operate in the public view and public interest. Our most current financial information is available for your review on our website at [www.OshkoshAreaCF.org/about\\_f.cfm](http://www.OshkoshAreaCF.org/about_f.cfm).

Additionally, the Oshkosh Area Community Foundation Corporation will make available for public inspection the last three years of its tax documents, including Internal Revenue Service Forms 990, 990-T (if applicable), and the Foundation's application for tax exemption, IRS Form 1023. The requested documents will be provided on the day of the request, if possible, or within no more than 30 days of the request. The requestor will be charged a reasonable fee for the copying and postage costs. Some of these documents also are available on the website at [www.OshkoshAreaCF.org](http://www.OshkoshAreaCF.org).

# Audited Financial Statements

Assets	2016	2015
Cash & Investments	\$97,405,868	\$99,829,753
Receivables	2,030,899	2,379,930
Property & Equipment	642,101	673,398
Other Assets	100,813	83,027
<b>Total Assets</b>	<b>\$100,179,681</b>	<b>\$102,966,108</b>

Liabilities & Net Assets	2016	2015
Agency Funds	\$36,369,158	\$38,060,479
Payables	1,486,218	1,994,514
Long-Term Debt	1,144,701	1,470,083
<b>Net Assets</b>	<b>61,179,604</b>	<b>61,441,032</b>
<b>Total Liabilities &amp; Net Assets</b>	<b>\$100,179,681</b>	<b>\$102,966,108</b>

Contributions*	2016	2015
	<b>\$7,262,800</b>	<b>\$5,476,737</b>

Distributions	2016	2015
Grants/Scholarships	\$3,759,295	\$5,092,723
Agency/Designated	814,017	578,786
Total Grants/Scholarships	4,573,312	5,671,509
Program Expenses**	1,665,810	1,530,294
<b>Total Distributions</b>	<b>\$6,239,122</b>	<b>\$7,201,803</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.

Give online at:  
[www.OshkoshAreaCF.org/donor\\_faf.cfm](http://www.OshkoshAreaCF.org/donor_faf.cfm).

## GIVE LATER

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

Let us know your intentions and get help directing the purpose of your estate gift by contacting us at 920-426-3993 or [info@OshkoshAreaCF.org](mailto:info@OshkoshAreaCF.org).

### Sample language for a bequest to meet the community's greatest needs:

"I give to the Oshkosh Area Community Foundation Corp., a Wisconsin nonprofit public charity, (insert the percentage of your estate, trust or a sum of money) OR (all my right, title and interest in the following described property \_\_\_\_\_).

This gift shall be used to establish the \_\_\_\_\_ Fund and shall be invested and distributed at the sole discretion of the Foundation's Board of Directors." (If you wish to name additional beneficiaries, please state them here).

## Boards of Directors & Staff

### OSHKOSH AREA COMMUNITY FOUNDATION Board of Directors

Victoria Beltran  
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Dave Elbing  
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Mark Lasky, *President*  
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Jeff Trembly, *Secretary*

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Larry Bittner  
Michael Castle  
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Tom Harenburg  
Lorrie Keating Heinemann  
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Jack Sullivan  
Sam Sundet  
Bill Wyman  
Gary Yakes

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Mark Judas, *Treasurer*  
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Destina (Dusty) Walker

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Emily Dunham, *President-Elect*  
Mae Kosciuk  
Peggy Larson  
LaVerne Olson  
Kate Pfaendner, *President*  
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Peter Running  
Mary Lou Schroeder  
Michael Sommers (*grants only*)  
Helen Thomson  
Mike Vaughan (*advisory*)  
Penelope Weyenberg (*grants only*)

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Bonnie Behnke, *President*  
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Judy Seibold  
Marcia Smith-Leslie  
Dr. Petra Roter  
Ann Trembly  
Cherri Vierthaler

### OSHKOSH AREA COMMUNITY FOUNDATION Staff

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

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[www.greenlakecountyriponcf.org](http://www.greenlakecountyriponcf.org)



Accredited in compliance with the National Standards for all U.S. community foundations as set forth by the Council on Foundations.

