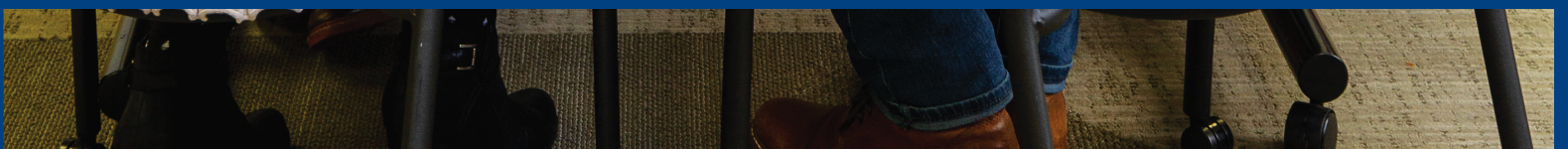




# ANNUAL REPORT 2022



**Learn | Invest | Engage  
IN OUR COMMUNITY**



## Welcome

We are seeing a significant movement of assets from one generation to the next, or in the case of the Oshkosh Area Community Foundation, sometimes to our organization or other charities. In fact, the greatest wealth transfer in history is underway, and it's estimated that nearly 45 million U.S. households will transfer more than \$68 trillion over the next 25 years\*. We may never see such a large transfer of wealth again.

In this report, you will read about the process of planning to leave all or part of your estate to charity, how easy it can be, and examples of the impact a person can make. Whether you have a conversation about what your wishes are for your estate, with your financial advisor, accountant, legal advisor, or us, we encourage you to begin the process. Planning now can mitigate your tax burden today and what your heirs may have to contend with in the future.

I invite you to explore with us how you can create a legacy with charitable gifts to the Oshkosh Area Community Foundation and make a lasting impact.

Help make a difference. For good. For ever.

Bill Wyman  
President & CEO  
Oshkosh Area Community Foundation

\*source: National Association of Charitable Gift Planners, 9.27.22

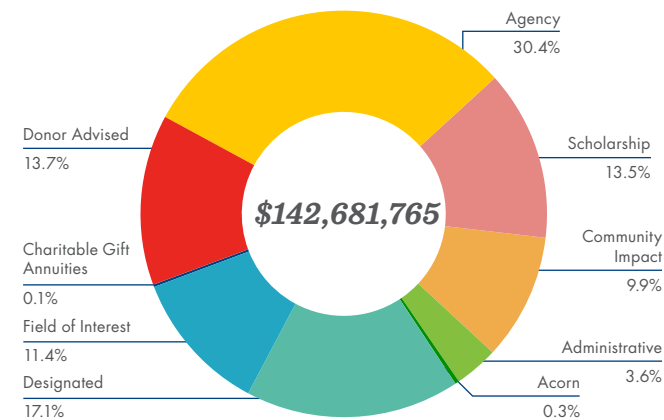
## What is the OACF?

### Oshkosh Area Community Foundation

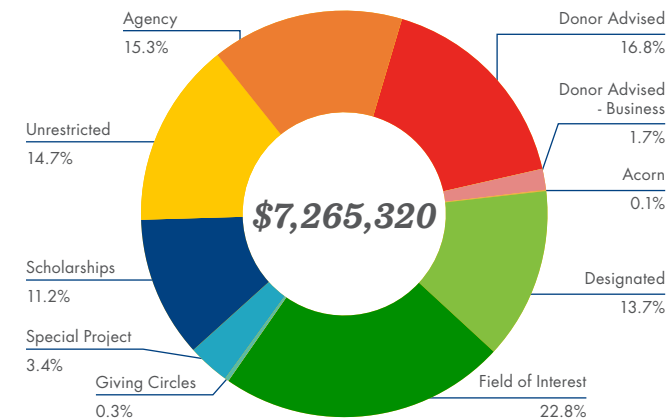
The Oshkosh Area Community Foundation is a 501(c)3 nonprofit organization that works with hundreds of donors who wish to invest in the future of our community.

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.

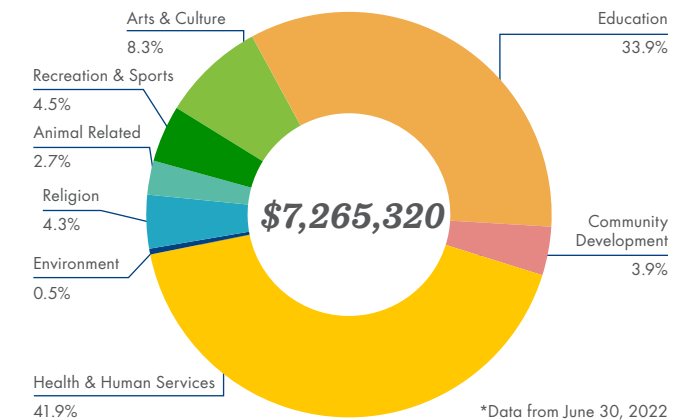
## Total Assets



## Grants By Fund Type



## Grants By Program Type



\*Data from June 30, 2022

## Audited Financial Statements

July 1, 2021 - June 30, 2022

	2022	2021
<b>Assets</b>		
Cash & Investments	\$139,078,127	\$152,041,762
Receivables	460,811	1,429,543
Property & Equipment	2,707,833	558,702
Other Assets	434,994	176,267
<b>Total Assets</b>	<b>\$142,681,765</b>	<b>\$154,206,274</b>
<b>Liabilities &amp; Net Assets</b>		
Agency Funds	\$43,427,356	\$49,174,456
Payables	2,344,951	2,387,162
Long-Term Debt	2,577,433	574,638
<b>Net Assets</b>	<b>94,332,025</b>	<b>102,070,018</b>
<b>Total Liabilities &amp; Net Assets</b>	<b>\$142,681,765</b>	<b>\$154,206,274</b>
<b>Contributions*</b>		
	<b>2022</b>	<b>2021</b>
	<b>\$13,509,008</b>	<b>\$7,474,035</b>
<b>Distributions</b>		
Grants/Scholarships	\$6,052,745	\$5,653,194
Agency/Designated	1,111,442	596,958
Total Grants/Scholarships	7,164,187	6,250,152
Program Distributions**	2,926,106	1,548,211
<b>Total Distributions</b>	<b>\$10,090,293</b>	<b>\$7,798,363</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.

## 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 strengthen our communities through collaboration and partnership with donors and others to ensure lasting impact and to improve the 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.

## Philanthropy 101

Philanthropy, estate plans, and planned giving. These concepts hold great meaning for us here at the Oshkosh Area Community Foundation. In the past few years, and we anticipate for some time to come, we are witnessing a collective transfer of wealth from our donors, and from folks we haven't yet met.

However, as one of our supportive attorneys recently stated "Wealth is a relative term and is directly related to each individual's situation. To one person, a sizeable gift to a charity is \$10,000. To another, it may be a gift of \$1,000,000. Charitable giving is not exclusive to wealthy individuals, but more importantly an opportunity for every person, and any time, in any place, to do good."

***"Charitable giving is not exclusive to wealthy individuals, but more importantly an opportunity for every person, any time, in any place, to do good."***

"Imagine if everyone simply gave 1% of their total estate to charity? It is conceivable that we could fund everything that needed funding after," states Karlene Grabner, Director of Donor Services. "Before our primary responsibility in working with donors is to always honor their wishes and help them achieve their goal of doing good."

Many of our donors are surprised to learn when you work with our staff in establishing a gift to be received from your estate, there are specific perimeters we adhere to including:

- We will not share or sell your contact information. With anyone.
- We will not contact you unless we believe there is relevant information you may need about your charitable plans.
- We allow for adaptability in your plans with the understanding circumstances may change either for you, or one of the organizations you wish to gift.

In addition, our services include assisting our donors in researching and vetting organizations you may wish to support. Your gifts can go to multiple organizations, in or out of state.

On occasion, we also work with donors in creative ways in which to fund their plans. There are often numerous assets to consider, such as life insurance, precious collections, or real estate, all of which can be woven into an estate plan by a donor in order to reach their charitable goals.

If you are looking to leave a legacy and "do good", we invite you to contact our office and explore ways we can help you achieve your philanthropic goals.



## Planning 101

Trust, wills, and beneficiaries. If these words and concepts seem daunting, they needn't be. In fact, quite the contrary is true. They should help ease your mind. To explore these options and establish a solid estate plan is one way to ensure that whatever you leave behind is what you want.

Two local attorneys were called upon to provide some insight into the process, and how easily philanthropy can be incorporated into the planning process. According to Nate Olson, a simple question often starts the process; "Where is it all going to go in the end?" Then, if a client doesn't have an answer, he often broaches the topic of philanthropy and works with the Oshkosh Area Community Foundation to explore options.

Nate sits on the OACF board of trustees, but even before joining the board, he and his peer, Attorney Julie Maslowski both indicated they routinely ask about charitable giving during the estate planning process. Julie notes, "When my clients take the time to sit down with the OACF, they become more invested in the process of charitable giving. It's gratifying to watch. Many are not aware of opportunities such as 'donor-advised funds' that allow them to create easy, tax efficient, and low-cost gifts." Nate agreed, stating, "The Foundation staff is wonderful to work with and very helpful in identifying areas of interest to a client, or specific charities." He also noted giving only to specific charities can sometimes become difficult, and it is often a better idea to focus on an area of interest, and entrust the decision to the Foundation staff. This can be especially true, as charitable organizations can change over time.



One of the goals for Nate and Julie in the planning process is to keep an estate plan relatively simple. One way to do this is to establish a trust, with yourself as the primary trustee while you are living, and select a secondary trustee, for when you pass. That way, if you choose, you can still benefit from your assets. All of your assets can go into a trust, and from there, upon your death, be distributed as you have indicated. Making sure your beneficiaries are appropriately identified, or establishing a trust, can help avoid the probate process when it comes time to execute your plans. In the ideal situation, Nate suggests getting your team together, including your financial advisor, your accountant, and your attorney to assist you in the planning process and have everyone working on it together.



Both attorneys agree the result of not planning can come at a high cost. For high-net-worth families, federal estate tax liability (at a rate of 40% of the overall net worth) can greatly impact the value of the estate. With proper planning during your lifetime, this tax liability can be avoided altogether through the use of charitable gifts either during life or upon death. It comes down to the very simple choice of leaving part of your wealth and estate to the government or to a charity of your choosing.

Like one of the first questions Nate asks, we invite you to ask yourself, "What will your legacy be?" If there is a cause or charitable program you are passionate about, the time to think about it is now. Advanced planning can give you peace of mind, knowing your affairs are in order. Proper planning will also help minimize confusion and potential conflict regarding the distribution of your assets.



*They wanted to leave their estate somewhere that would make a difference.*

## Planning to Leave a Legacy

Once you've looked at your estate plans, and realized you've taken care of your family and your other obligations, you may want to think about what you can do to make a difference and establish a legacy.

For one couple, Dave and Denise, the decision was a fairly easy one and they began conversations with the Oshkosh Area Community Foundation staff. The couple represents perfectly that philanthropists come in all ages and demographics. Both are hard-working, have had long careers in their chosen fields, and have also been the beneficiaries themselves of estates when dear relatives passed away. With no children of their own, they found themselves in a position of trying to determine what else they might do with the money and the estate they would leave behind.

They wanted to leave their estate somewhere that would make a difference. Denise knew of the Foundation and felt that working with it was a logical choice. They began having conversations with Foundation staff five years ago. They feel good about their plans, having set aside some of their estate for family and also ensuring that if one passes before the other, the remaining spouse will be well provided for.

One of the goals they had was to be able to diversify where their estate went without it being too complicated. Denise noted that working with the Community Foundation offered one-stop shopping. They worked with the Director of Donor Services, Karlene Grabner, and with her guidance identified 15 organizations or areas of interest they wished to give to. Karlene began her work of vetting and ensuring gift recipients would be good choices, with clear missions stated

by the organizations. Upon the deaths of both of them, the Community Foundation will disperse the funds. In the event one or more organizations cease to exist, or other issues arise, there is a secondary plan, which allows for a higher percent distribution to the remaining organizations.

They found the process of working with the Foundation straightforward, as they had already discussed their desires and plans with their trusted financial advisor of 30 years. They are very confident that their giving plans will remain confidential, and will be well carried out by the Oshkosh Area Community Foundation.

If you would like to explore how you can make an impact and leave a legacy like Dave and Denise, we encourage you to contact our offices today to begin the conversation.



## Legacy in Action

Richard and Margaret Osborn were educators, both born in states other than Wisconsin. Richard was a professor at UW Oshkosh for many years, teaching art classes. Margaret worked in the Oshkosh public school system.

When they passed away, unbeknownst to many of the charities which received gifts, they left a sizeable estate. With no children of their own, they chose to quietly work with a local bank to establish a trust in order to carry out their wishes.

Richard passed away in 2009 and Margaret, more recently, in July 2021. The impact of their gift is felt throughout the community and beyond, as they chose 16 organizations to receive gifts from their estate, the majority of which were located in the Oshkosh area. In a nod to their past, they also left a gift to the School of the Art Institute of Chicago, where Richard achieved his Bachelor of Fine Arts Degree.

The Oshkosh Public Museum received part of the bequest and an endowment fund was established at the Oshkosh Area Community Foundation. Sarah Phillips, the museum director, was pleasantly surprised to learn of the gift to the museum's endowment fund, held at the Foundation. She states, "I got goosebumps at that moment and I was thinking to myself, oh my goodness, someone is noticing our work!" The impact on their endowment fund will be felt for years to come, as it will allow museum staff to explore additional exhibits or new programming to reach visitors with educational outreach projects. She went on to say, "Bequests can be a game-changer. When we receive a gift like this, it will always be used for a traveling exhibition, to co-fund a large permanent exhibition, or to expand our educational programs, especially for school-age children. Our goal is to take a proactive and responsive approach and create our programs to honor all the people who have come before us, both indigenous and European settlers of Oshkosh. We see this as a continuation of the Sawyer legacy, by delivering meaningful experiences to benefit the public. We are grateful the Osborns thought of the Oshkosh Public Museum in their estate plan."



**“What is a Legacy? It’s planting seeds in a garden you never get to see.”**

*Lin-Manuel Miranda, Playwright and Composer, Hamilton*

# Endowed Funds

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

We gratefully acknowledge the generous donors who have entrusted us with their legacy by creating funds that are invested to provide support in perpetuity, or with current gifts which provide immediate support for our communities.

We regret we cannot name all our contributors within these pages. This list includes our Community Impact, Field of Interest, Donor Advised, Designated Funds and Giving Circles. All Education and Scholarship Funds are listed in the Education Report. All other funds can be found on our website at [www.OshkoshAreaCF.org](http://www.OshkoshAreaCF.org).

### Oshkosh Area Community Foundation Community Impact Funds

Reuben H. Bitter Fund  
Richard Bork Fund  
William and Helen Burger Fund  
Clarendon J. Combs and Jessie Clark Combs Fund  
Louis C. Draheim Fund  
Marjorie Drexler Fund  
Horace M. Faulk Memorial Fund  
Mary Malnar Fund  
**Richard and Doris Martin 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  
**The Merlin R. and Ruth I. Wegner Community Impact Fund**  
Social Impact Investment Loan Fund  
E. B. Williams Fund  
Herbert C. Yagers and Mae Yagers Memorial Fund  
May Ziebell Legacy Fund

### Field of Interest Funds

Mildred M. and Edward W. Baar Youth and Education Fund  
Iyle L and Ella Mae E. Beck Fund  
Boeing Family Fund  
Career Transition Fund  
Child Care Provider Training Fund - Green Lake County  
Child Care Provider Training Fund - Winnebago County  
**Community Disaster Response Fund**  
Environmental Endowment Fund  
Fund for the Arts  
The Dementia Awareness Fund  
Charles and Marian Garbrecht Fund  
Bob Gertsch City Parks  
Guenther-Matz Trust Fund  
Health, Shelter and Food Fund  
Hiwela Youth Fund  
Homelessness Continuum Fund  
Carl W. Ives Fund  
Henry H. and Patricia W. Kimberly Fund for Youth  
Ladies Benevolent Society: Advocates for Older Adults  
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 Youth Fund  
Al and Lucille Oswald Public Safety Fund  
Erna O. Payton Fund  
Lucille and Edward Plashko Fund  
Elizabeth J. Rasmussen School Program Fund  
Edward and Belle Rudoy Endowment Fund  
Mary Schilcher Fund  
Grace M. Shimek Fund  
Margaret Tabbert Fund  
Taking Root Fund  
Mildred E. Turner Art and Music Fund  
Mildred E. Turner Youth and Children Fund  
L. S. Tuttle Memorial Fund  
U.S. Venture Fund for Basic Needs  
**Webster Family Fund**  
**Merlin R. and Ruth I. Wegner Fund**  
Winnebago County Crime Prevention Fund  
M. Jarlath Wolf Fund for the Elderly  
Mildred E. Turner United Methodist Church Fund

### Donor Advised Funds

Abigail Fund  
Allured Fund for Confectionery Education  
Brandon J. Backus Fund  
Birmingham Fund  
Tom Blaze Fund  
**Straub and Bolek Family Fund**  
**Natalie Kate Bolin Memorial Fund**  
Bressers Family Fund  
Willard and Val Carlson Memorial Fund  
MJ Castle Fund  
Thomas and Trisha Castle 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  
Katrina Rose and William James Edwards Fund  
First Business Bank Charitable Fund  
Cameron Victor Gassere Fund  
The Gateway Community Fund  
David and Sharon Geurden Fund  
Jeffrey W. Glasheim Family Fund  
Jenna and Chris Golem Fund  
Charles T. and Jean F. Gorham Fund  
Govani Gives Fund  
Grieving Childrens Fund  
Karen Gremminger and Mark Bullard Donor Advised Fund  
Grine Family Fund  
Adam D. Gundlach Fund

Tom and Penny Harenburg Fund  
Kirk and Anne Haverland Family Fund  
Hebrews 13:16  
Heaney Family Fund  
Evelyn Heuer Fund  
Hirschberg Family Fund  
Hoopman Foundation  
Laurie Hoopman Family Fund  
Douglas and Christina Hyde Fund  
Marianne and Tom Ivey Charitable Fund  
The JEK Fund  
Stella Jirschle Fund  
JJD Fund  
Colonel George Johnson 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  
Dr. Michael and Paulette Olsen Lewis 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  
Todd Mason Memorial 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 Carol E. McIlree Fund  
Mary J. Tank Memorial Fund  
Triangle Manufacturing Fund  
Burk and Chris Tower Fund  
TFL Fund  
Jeff and Ann Tremby Fund  
Mark D. and Christine G. Trout Donor Advised Fund  
John L. and Susan T. Vette Family Fund  
Sgt. Andrew Wallace Donor Advised Fund  
Jack and Deloras Weissling Family Fund  
Wilhm Family Charitable 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  
William and Caitlin Wyman Fund  
Wayne and Suzanne Youngwirth Endowment Fund

Thomas R. Pech Sr. & Dolores (Dee) Pech Memorial Fund  
Mike Phillips Memorial Youth Fund  
Richard and Audrey Pennau Fund  
Praemittere Fund  
Pfoendtner Legacy Fund  
Tim Pinnow and Heather Holly-Pinnow Family Fund  
Provident Financial Consultants Fund  
Robert E. Pung Memorial Fund  
David and Mary Ellen Putzer Fund  
William and Deborah Quandt Fund  
Steven L. Randall Memorial Fund  
Rauch Charitable Fund  
Reff Family Fund  
Roberts Fund  
Rodgers Fund  
Rogers Donor Advised Fund  
Rommelfanger Family Fund  
Paul (PJ) Rottman Fund  
Janet Scalpone Fund  
John and Amy Schiek Family Fund  
Schiek Sports Corporate Fund  
Dennis and Gail Schwab Fund  
Michael and Lisa Scott Fund  
Seibold Family Fund  
Carey and R.J. Sharpe Family Fund  
Tom Shepeck Memorial Fund  
Shikoski Family Fund  
Dara and Scott Sitter Fund  
Dr. Eric Smilneek Healthy Student Fund  
Nicholas Luther Stadtmueller Memorial Fund  
Stapel Family Fund  
William D. Steenberg Fund  
Kenley and Carole Steinert Fund  
Maxfield Sterkens Family Fund  
Mary Patterson Stevenson Fund  
Sullivan Schumacher Fund  
Take 5 Fund  
Mary J. Tank Memorial Fund  
Triangle Manufacturing Fund  
Burk and Chris Tower Fund  
TFL Fund  
Jeff and Ann Tremby Fund  
Mark D. and Christine G. Trout Donor Advised Fund  
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Bill and Beth Wyman Fund  
Thomas and Shirley Wyman Fund  
William and Caitlin Wyman Fund  
Wayne and Suzanne Youngwirth Endowment Fund

### Beltran Zaglan Donor Advised Fund

#### Giving Circle Funds

M3 Fund  
Women Who Care-Greater Oshkosh Giving Circle  
Young N.U.T.S. (Never Underestimate the Sisterhood) Fund

#### Designated Funds

ADVOCAP, Reducing Poverty Fund  
AED Defibrillator Fund  
Alzheimer's Association of Greater Wisconsin Fund  
Apricity Endowment Fund  
Apricity Fund  
Margaret Bekkers and Thomas Feavel Fund for Saint Francis Community Clinic Father Carr's Place 2 B for purchasing Medical and Dental Supplies Fund  
Margaret Bekkers and Thomas Feavel Fund for the Christine Ann Center's Greatest Need Fund  
Ronald J. and Marion E. Bell 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 Mental Health Wellness 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  
Elroy L. Brazil Fund  
Christine Ann Domestic Abuse Services 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  
Dosogne Boys and Girls Club Maintenance Fund  
Education Foundation of the Neenah Joint School District  
Endowment Fund of First Lutheran Church of Poy Sippi, WI  
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  
Friend of the Oshkosh Area Community Foundation Fund  
Friends of the Oshkosh Public Library Youth Programming 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  
**The Grand Oshkosh Capital Fund**  
Grand Performance Fund of the Oshkosh Opera House Foundation  
Fund for the Christine Ann Center  
Karen M. Gremminger and S. Mark Bullard Fund for the Oshkosh Humane Society  
James Grine Oshkosh Youth Symphony, In Flute Award Fund  
Habitat for Humanity Fund  
Tom and Penny Harenburg Zoo Fund  
Robert G. Hatch Endowment 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 Kuettnier Endowment Fund  
Paul A. Larson Leadership Fund  
Leach Amphitheater Fund  
Light the Bridges Fund  
Lourdes Academy Elementary Construction Fund  
Love of Animals Fund  
Carol A. Meeuwssen-Jones and Norris W. Jones Fund  
Arlene E. Meier Fund for the Oshkosh Area Humane Society  
Ron Metz Centennial Fund  
Miravida Living Foundation Dream Weaver Fund  
Military Veterans Museum Endowment Fund  
Park View Health Center Endowment Fund  
Constance Misky Endowment Fund  
The Morgan House Historical Preservation Fund  
NAMI of Oshkosh Fund  
Neenah-Menasha Emergency Society Fund  
Nelson Family Fund  
Charles Nevitt Fund  
Northeast Wisconsin Land Trust Land Protection Fund  
Nova Counseling Services Fund  
OACF Reserve Fund  
OAHS Senior Cats Fund  
OAHS Staff Professional Development Fund  
Oaklawn School Playground Fund  
Oakwood Aviation Program Sustainability Fund  
Oakwood Environmental Education Charter Sustainability Fund  
Elaine and Robert Oelfein Fund  
Omro Area Community Center Endowment Fund  
Omro Carter Memorial Library Facility Improvement Fund

Omro Extra Curricular Endowment Fund  
Omro Veterans Memorial Perpetual Care Fund  
**Margaret K. Osborn Fund for the Oshkosh Public Museum**  
**Margaret K. Osborn Fund for the Oshkosh Senior Center**  
Oshkosh Area Community Pantry Fund  
Oshkosh Area Humane Society, Inc. Fund  
Oshkosh Area United Way Fund  
Oshkosh Community Education 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 Healthy Neighborhoods Fund  
Oshkosh High School/West High School Veterans Honor Wall Fund  
Oshkosh Ice Hawks High School Hockey Fund  
Oshkosh Jaycees Fund  
Oshkosh Kiwanis Foundation Fund  
Oshkosh Local Project Fund  
Oshkosh Parks Foundation 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 Yacht Club Sailing School Endowment 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 Veterans Museum  
Park View Health Center Endowment Fund  
Karl and Janice Pennau Family Fund  
Marie and Bobby Pesch Mental Health 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  
Ellinor Porter Youth Orchestra Fund  
Program and Operations Fund of the Oshkosh Area Community Foundation  
Rawhide Fund  
Reach Counseling Fund  
Mary Jo Reichenberger Fund  
Leonard and Lucille Reinke Fund  
ROXEE Fund  
Belle and Edward H. Rudoy Designated Fund  
Eleanor Ryan Washington School Reading Fund  
Jim Ryan Menominee Zoo Fund  
**Salvation Army Donor Designated Endowment 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  
Pat and Karl Schulz Fund  
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  
Southwest Rotary Releaf Fund  
Gilkey Stevenson Fund  
**Streeter Family Fund**  
**The Teachers' Closet 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 United Methodist Church 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  
Vandenberg Older Cat Fund  
Lynne Webster Rotary Clock Endowment Fund  
Webster Stanley Fund  
Kay Wilde Memorial Fund  
Winnebago Conflict Resolution Fund  
Winnebago County 4-H Educational Endowment Fund  
Winnebago County Historical and Archaeological Society Fund  
Winnebago County Literacy Fund  
Winnebago County Sheriff's Office K-9 Program Fund  
Winnebago County Sheriff's Office Search and Rescue Fund  
Winnebagoland Focus Fund  
Winneconne Historical Society - Geraldine Driscoll Memorial Fund  
WPS Fund  
Joan Wislinsky Designated Fund for Oshkosh Family, Inc.  
YMCA Endowment Fund  
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. Walter Charitable Gift Annuity Funds

## Green Lake County/ Ripon Community Foundation

### Community Impact Funds

Lucile M. Grams Fund  
Green Lake County/Ripon Community  
Foundation Fund  
Herman Schultz Fund

### Field of Interest Funds

Green Lake Basic Needs Fund  
Ripon Fund

### Donor Advised Funds

Princeton Area Community Fund

### Designated Funds

Julie Barry Unmet Needs Fund for the  
Boys and Girls Club of the  
Tri-County Area  
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 Greenways 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  
Ripon Public Library Fund  
Ripon Club of Ripon  
Charitable Foundation  
Thrasher Opera House Endowment Fund

### Lourdes Academy

#### Designated Funds

Joan I. and Clifford W. Bunks Tuition  
Assistance Fund  
Alyssa Koelbl & Marissa Marx Memorial  
Scholarship Fund  
Lourdes Academy Endowment Fund  
Thomas A. Plain Annual Scholarship Fund  
Douglas L. Posorske Memorial Fund  
Tim Purtell Tuition Fund  
Fr. Daniel Schuster Vocation 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  
Bill Behring Staff Endowment Fund  
Louis Carpenter Memorial -  
Bishop Wycislo Scholarship Fund  
Corky Daniels Memorial  
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

Kemp Family Scholarship Fund  
Rich Knobloch "Pibb Sure" Fund  
Judy and Tom Kuble Fund  
Lourdes Academy Music Booster Fund  
Lourdes Foundation Fund  
Luker Family Fund  
Leo M. & Muriel M. Metzler Tuition  
Assistance Fund  
Constance Misky/Frank & Virginia  
Schneider Scholarship Fund  
Dennis and Karol Noone Family Fund  
Oshkosh Tool Tuition Assistance Fund  
John Schatz Endowment Fund  
John W. Schmid Memorial  
Scholarship Fund  
Stanley Spanbauer Family  
Scholarship Fund  
St. Clare of Assisi Fund  
John C. Stadler Memorial Fund  
The Staszkiwicz Family  
Scholarship Fund  
Florence Swan Scholarships Fund

### Oshkosh Public Library

#### Designated Funds

AV Trust Fund  
The Adelia Fleming Archer  
Memorial Fund  
Arthur H. Gruenewald Fund  
George Hilton II Special Fund  
Karen M. Gremminger and S. Mark  
Bullard Fund for the Oshkosh  
Public Library  
Herman L. Hoxtel Fund  
Herman Hoxtel Fund  
John Hicks Memorial Fund  
Carl W. Ives Library Fund  
Gertrude Jackson Children's  
Memorial Fund  
Charlotte F. James Fund  
Eileen D and William E. Kelsh  
Memorial Fund  
Genevieve Bridget Kenny Memorial  
Trust Fund

Library Development Fund  
Robert H. and Shirley M.  
Mainwaring Fund  
Mary Malnar Children's Program Fund  
John V. Nichols Digital Library  
Development Fund  
Oshkosh Public Library Collection  
Improvement Fund  
Oshkosh Public Library Development and  
Support Fund  
Oshkosh Public Library Facility  
Improvement Fund  
Oshkosh Public Library Programming  
Support Fund  
Oshkosh Public Library Technology Fund  
Joseph S. Pine Fund  
Mabel Rassmussen Fund  
Frank and Anna Rojahn Fund  
Ann and Wesley Schneider Library Fund  
William A. Steiger Memorial Fund  
William Steiger Fund  
Steven J. Zellmer Fund  
John F. and Helen T. Schuster Fund

### Neenah Joint School District

#### Designated Funds

Frank X. Hocholzer Library Fund  
Horace Mann 6th Grade Learning  
Experience Fund  
Judy Kurka Nagel Memorial 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&Js Mental Health Fund  
Rally 'Round Reading Fund  
Carol Tipler Student Enrichment Fund  
Vera Tipler Professional  
Development Fund  
Gus Toepel Fund

### Field of Interest Funds

Neenah High School Alumni 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  
**Oakwood Elementary School  
Endowment Fund**  
Oshkosh Area School District Education  
Foundation Fund  
Oshkosh Area School District Education  
Foundation Basic Needs Fund  
Oshkosh High School Alumni  
Opportunity Fund  
Brandon Lee Sheppard Memorial Fund  
George M. Steele High School Fund

### Ripon Education Foundation

#### Designated Funds

Ripon Education Foundation  
Program Fund  
**Ripon Public Library Renovation Fund**  
Jennie Long Tutorial Fund

### Winneconne Area Community Foundation

#### Community Impact Funds

Winneconne Area Community  
Impact Fund

### Field of Interest Funds

Winneconne Basic Needs Fund  
Winneconne Civic League Fund

### Donor Advised Funds

Albright-Next Generation Fund  
Winneconne Community School District  
Extra Curricular Fund  
Winneconne Science, Technology,  
Engineering, Math (STEM) Fund  
Winneconne Thrift & Gift Inc. 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  
Heidi Jerabek Memorial Grant  
Piano Fund  
Lord of the Lakes Endowment Fund  
Betsy and Jack Maier Music Fund  
WCSD Strength Facility Fund  
Winneconne Area Education Fund  
Winneconne Community Arts Center  
Endowment Fund  
Winneconne Community School District  
Emotional Wellness/Mental  
Health Fund  
Winneconne Elementary School Track an  
Outdoor Recreation Fund

Winneconne Community School District  
Endowment Fund  
Winneconne Historical Society  
Operations Fund  
Winneconne Public Library Fund  
**Winneconne Youth Wrestling Club Fund**

### Women's Fund Of The Oshkosh Area Community Foundation

#### Field of Interest Funds

Jean I. Caudle Fund for Women  
Susan Hardy Heaney and Doris Hardy  
Schwalm Fund  
Patricia J. Koll 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  
**Nan West Devermann Fund**  
N. L. Dirlam Women's Fund  
David and Susan Elbing Fund  
Granny Annie Fund  
Herzog Family Fund  
Chryst Hyde Fund  
JES Fund  
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  
Jeanne and Quintin Metzger Fund  
Nelson Women's Fund  
Ruth A. Nordhaus Fund  
SHE3 Fund  
Dawn Johnson Smith Fund  
Marcia Smith-Leslie Fund  
Stadtmueller-Kilp Family Fund  
Vette Girls Fund  
Vierthaler Family 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, 2021 to  
June 30, 2022 are listed in bold.

# Board of Directors & Staff

## OACF Board

Victor Alatorre  
Victoria Beltran  
John Broderick  
Tom Castle  
Jason Feltz, *Treasurer*  
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Scott Sitter  
Jeff Trembly, *President*

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Larry Bittner  
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Sheldon Lasky  
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Sylvia McDonald  
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Jack Schloesser  
Patrick Seubert  
Steve Sorenson  
Jack Sullivan  
Sam Sundet  
Burk Tower  
Dave Vierthaler  
Beth Wyman  
Bill Wyman  
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Vicki Krueger, *Vice President*  
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## Winneconne Area Community Foundation Board

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Marsha Patterson, *President*  
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Kristin Sullivan  
Rose Unser  
Craig Wiedemeier  
Jessica Van Bommel  
Mike Vaughan, *Past President*

## Green Lake County/ Ripon Community Foundation

## Oshkosh Area Community Foundation Staff

Dawn Clark, *Executive Assistant*  
Cheryl Fowler, *Director of Education*  
Karlene Grabner, *Director of  
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Amy Putzer, *Director of Programs*  
Jennifer Sheahan, *Director of Finance  
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Dawn Watson, *Office and  
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Serving Winnebago County, Waushara County, Green Lake County and Ripon, along with our affiliates:



[www.women.oshkoshareacf.org](http://www.women.oshkoshareacf.org)



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



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



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

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