



Greater Milwaukee
FOUNDATION
greater together

our shared vision

OPPORTUNITIES RISING



Annual Report 2016

Passionate hearts
committed to a
shared vision can
accomplish the
impossible.

— Paul Chucks



The sculpture "Compassion" serves as a symbol of love
and unity for Milwaukee's Sherman Park neighborhood.

OUR SHARED VISION

Greater Milwaukee becomes a **VIBRANT,**
economically **THRIVING** region
comprised of welcoming and **INCLUSIVE** communities
that provide **OPPORTUNITY,**
PROSPERITY and a high quality of life for all.

LETTER FROM PRESIDENT & CEO AND BOARD CHAIR

Time and again we hear that the Greater Milwaukee Foundation plays a critical role in strengthening our region, through which the earnest work and shared values in philanthropy, civic enterprise, nonprofit service and the voices of the many converge. Bringing people and ideas together is transformative for our community – adding momentum to the progress all around us.

Bridging our individual histories and perspectives is a shared vision for our region, one with welcoming communities, economic prosperity and a high quality of life for everyone. This bright future is possible as today's enthusiastic leadership carries forward to the next generation, and the remarkable generosity in our community animates our collaborative efforts to achieve common goals.

When the Foundation and our essential partners invest in neighborhood healing and cohesion, it nurtures hope. When we support health interventions where disease disproportionately affects people of color,

it advances equity. When we convene partners across educational sectors to improve learning for all children, it forges unity. And the passion of every one of our partners contributes to social and economic vibrancy in all four counties of our greater Milwaukee region.

Our donors are driven by their passions and interests, and the care with which they give back is deep, informed by their understanding of what the community needs and where their contributions can have the greatest impact. As the region's largest community foundation, we consider it our purpose and privilege to provide donors and the community at large with powerful tools of understanding – knowledge that guides our collective blueprint for a prosperous and equitable region.

We hope you take great pride as you read this year's annual report. Thank you for your passion and generosity, which energize our community. I invite you to continue this great momentum with us and ensure that opportunities rise for generations to come.



Ellen M. Gilligan, President & CEO



Cory L. Nettles, Board Chair

Board of Directors: Cory L. Nettles, Chair • David J. Kundert, Vice Chair • Mary Beth Berkes • Wendy Reed Bosworth • Pedro Colón • David J. Drury • Janine P. Geske
Cecelia Gore • Jacqueline Herd-Barber • Paul J. Jones • Dale Kent • Gregory S. Marcus • Marie L. O'Brien • Mary Ellen Stanek • Gregory M. Wesley



Board Chair Cory L. Nettles and President & CEO Ellen Gilligan along with three young area leaders, Sofia Jonas, Thomas Leonard and Nou Xiong, who spoke at the Foundation's 2017 annual meeting.

For more than 100 years, we've been dedicated to building a better future for our region. But our vision for a greater Milwaukee is not one that we can achieve on our own. A shared vision unites the passion we each have inside with the resources and partnerships available in our community to make change possible. Our deep roots in the community, combined with our donors' unwavering commitment and financial resources, along with the dedication of our nonprofit partners, can lead to positive transformation not only for this generation, but for generations to come.

Visit greatermilwaukeefoundation.org/shared-vision for a video about our donors and their commitment to our region.

BERNARD J. AND MARIE E. WEISS FUND

Marie's late husband, Bernard, drew great pleasure from the private lessons he took at the Wisconsin Conservatory of Music. Their fund supports education and music, including providing support to the conservatory.

MARIE WEISS

“The community is like a mosaic. Each one of us contributes from our own perspective. It's that synthesis, the linking of this element and that element, which makes us stronger. Link by link, step by step, we're all working together to create this greater Milwaukee area and ultimately everyone benefits from the interlinking of different efforts.”



BYRDA AND IRVING RAFFE FUND

The Raffes describe themselves as individuals who find great enjoyment in giving and, as Foundation donors for more than 20 years, have enjoyed being a part of an organization that provides so many different ways for them to channel that passion.

BYRDA AND IRV RAFFE

“The Foundation’s focus was always about the donor and the people being served in the community. That really impressed us. I believe that the relationship is what really drives our work together. People working together. The Foundation exemplifies that way of thinking. A feeling of being a partner. I keep going back to that because I think that’s critical. That’s the glue. It’s the relationship that the donor has with the Foundation. It’s the relationship that the Foundation has with the people and institutions that get the grants.”

HALE FAMILY FUND

Jack Hale's passion lies in his community of Cedarburg and, through his fund, he's making sure others can enjoy the unique treasures and cultural assets, such as the Cedarburg History Museum, that make the city such a strong destination.

JACK HALE


“Well, I just played a little bit of a part, but you know what's really important is that there is a large number of people playing a little part, sometimes a little larger part, to fulfill goals. It's very rewarding.”

JAO AND JNO FUND

Two of Jose Olivieri's great education and the Hispanic involvement with the United the past 40 years, he's been

JOSÉ OLIVIERI

“The great strength of the Foundation is that it leverages many philanthropic efforts in the community, large and small, toward the support of various strategies to enhance the quality of life in the metropolitan area.”

A portrait of Jeanette Mitchell, a man with dark hair, a mustache, and glasses, wearing a dark suit, white shirt, and a patterned tie. He is smiling slightly and looking towards the camera. The background is a blurred interior space with a framed picture on the wall.

passions in life have been
community. Through
Community Center over
able to support both.

LEGACY FOUNDATION FUND

Jeanette Mitchell has made it her life's work to serve and strengthen diverse communities of Milwaukee through such avenues as the Legacy Foundation, which supports entrepreneurship, and the Cardinal Stritch Leadership Center, which nurtures future leaders.

JEANETTE MITCHELL

“When we come together as one community, we have the power to make changes to our collective lives. When we create silos for perceived individual power, we lose many lives in the process. The Foundation is all about collective power.”

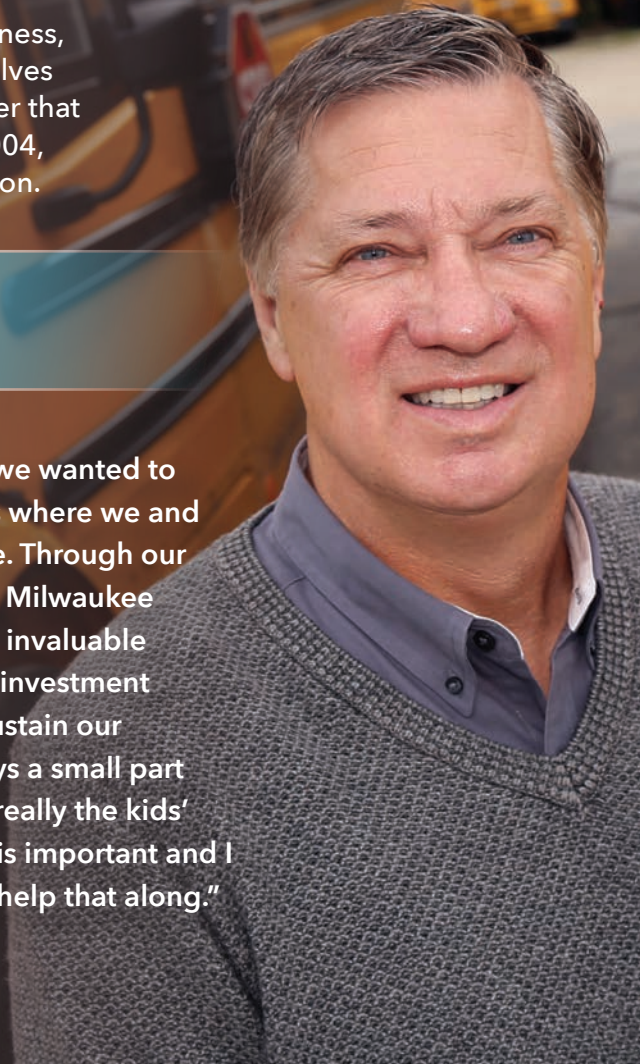


JOHNSON FAMILY FUND

As owner of a school bus business, Dan Johnson's livelihood revolves around students. It's no wonder that his family's fund, created in 2004, supports children and education.

DAN JOHNSON

“West Bend is my home, but we wanted to give back to all communities where we and our employees work and live. Through our partnership with the Greater Milwaukee Foundation, we have gained invaluable support in grantmaking and investment management to grow and sustain our charitable family fund. It plays a small part but helps serve families. It's really the kids' learning and education that is important and I see a lot of people trying to help that along.”





CAMPS FOR KIDS FUND

In Milwaukee, the Peck family name is synonymous with philanthropy. Karen Peck Katz, a fifth-generation family member, is keeping that tradition alive as an adviser to a fund that provides camping opportunities to children with limited financial resources.

KAREN PECK KATZ

“Everybody has to work together to make the community a better place. The Greater Milwaukee Foundation is a wonderful place for people to understand what’s happening in the community and in the philanthropic world and to connect like-minded people to create lasting change.”





1,394 nonprofits supported through donor generosity

47 donors created new philanthropic legacies

Donor Marshall Chay at Ronald McDonald House Charities of Eastern Wisconsin, a nonprofit that he supports through his Foundation fund and with his time as a board member.

PASSION

Passion and personal experience. These are two common sources of inspiration behind what drives our family of philanthropists and their giving. Their passions cover a wide variety of causes, everything from the arts to the zoo. A personal experience oftentimes fuels that passion and steers them in a certain charitable direction. Growing up in South Korea, Marshall Chay's family struggled with putting food on the table. Rice was a mainstay. Protein was a luxury. A move to the United States when he was 8 years old freed the Chays from the worries of when their next meal would be, gave Marshall access to a quality education and ultimately led him to live out the American dream. He became the owner and

operator of nearly a dozen McDonald's restaurants over the past 30 years. Through his philanthropy, he focuses his giving on education, hunger and children's causes, such as the Ronald McDonald House Charities of Eastern Wisconsin.

The Foundation is a hub for supporting donors' passions, forming a collaboration that builds a stronger community. While no one individual fund is able to move the needle on systemic issues that confront our society, collectively our donors' resources have tremendous impact in the community and create real change.

VIBRANCY

Whether it's the city or the suburbs that we call home, a commonality is our strong desire to live in a socially and economically vibrant community. Vibrancy manifests itself in a multitude of ways: A community with public trails, parks and ample green space. Access to quality health care, family-supporting jobs and education. Thriving neighborhoods. An enriching arts and cultural scene.

Our donors are investing in people and places throughout metro Milwaukee to bring that vibrancy to life. Their generosity is helping preserve local farms so they can provide fresh produce to underserved areas. It's building capacity for organizations such as the Waukesha County Land Conservancy so it can continue to protect woodlands and wetlands for generations. Community cornerstones like Waukesha's La Casa de Esperanza are

preparing for future growth in services by expanding their physical footprint thanks to capital investments.

Donor investments in 2016 also are fueling new research at the University of Wisconsin-Madison, Marquette University and Children's Hospital of Wisconsin to explore innovative approaches to tackling diseases such as cancer, multiple sclerosis and heart disease. Investments are conserving Milwaukee County's rich musical history through a new exhibit at the Milwaukee County Historical Society and are cultivating new programming at the Museum of Wisconsin Art, one of the country's top regional art museums.

All these elements lead to a more distinct, beautiful place that we can all be proud to call home.



\$4.5 million

in grantmaking toward
environmental causes

Protecting environmentally significant lands, such as Martin's Woods in Waukesha County, contributes toward a more vibrant region.



21.6% drop in crime in
Milwaukee's Amani
neighborhood

Residents from Milwaukee's Amani neighborhood
at the annual Bloom & Groom plant sale event.

UNITY

Milwaukee has had thousands of individuals across government, nonprofit and philanthropic sectors diligently working for years to improve educational outcomes for the city's kids. But nothing was quite moving the needle far enough. What was missing was a coordinated effort. Five years ago, the Foundation harnessed all that human energy and organized resources around common goals and strategies. That historic partnership – Milwaukee Succeeds – has endured, has included more than 300 partners and is starting to see results, the most promising of which is a new literacy model that boosts the confidence and test scores of early readers. Private dollars and collective impact helped design and test the model, but choice, charter and public schools are building teacher development and continuous improvement into how they operate. Additional investment from local, state and national

fundors continues to fuel the partnership's efforts to reach its education goals more quickly.

That same collaborative spirit is at the heart of how Foundation donors are supporting healthier neighborhoods. Residents of Amani, one of Milwaukee's more distressed areas, are changing their trajectory, thanks to resources from the Foundation, local nonprofits and the federally funded Building Neighborhood Capacity Program. As a result, resident engagement and leadership has blossomed, block watches and beautification efforts have been born and overall crime has dropped.

Both programs are proof that when the community works in concert to achieve common aspirations, systems-level change is achievable.

HOPE

We don't go through life wearing rose-colored glasses. We know that while our region is fortunate to have an immense array of assets, it also has its share of ongoing needs and intense challenges. Some days, these hurdles may seem insurmountable. Yet we press on. Why? Because of our community's potential to become a world-class region and our donors' commitment to that vision. In late summer 2016, when residents of Sherman Park, one of our city's most diverse neighborhoods, were hurting, our donors and nonprofit partners moved quickly. The Foundation, with additional support from donors, created the Reasons for Hope MKE Fund. It supported residents' efforts to start the healing process following two days of unrest in Sherman Park, and also build stronger community throughout neighborhoods citywide. Philanthropy took root, and in its place sprung forth events and programs promoting cohesion and peace.

A community baby shower and Thanksgiving event were held in Sherman Park. A sprinkling of Little Free Libraries popped up along the Center Street corridor. Youth expressed their creativity and different cultures through a fashion show in Harambee. In Lindsay Heights, residents gained culinary training and employment at The Tandem, a new restaurant that has quickly become a neighborhood fixture and has drawn business into the area. A program in Metcalfe Park, Millwood Park and Sherman Park neighborhoods offered social and emotional skills training to young adults so they could deal with and heal from conflict.

Though varying in size and scope, these projects have served as ways to encourage new relationships and further strengthen the social fabric of the city.



More than

\$27 million

in community development
invested since 2014

Through her new restaurant, The Tandem, Caitlin Cullen (third from right) has brought new jobs and energy into Milwaukee's Lindsay Heights neighborhood.



20,000 Latino children, ages 9 and younger, are projected to be living in Nativity Jesuit Academy's neighborhood by 2018.

Results from the Greater Milwaukee Foundation's Latino Milwaukee: A Statistical Portrait provided valuable insight for the Nativity Jesuit Academy as it planned an expansion and capital campaign. The school was one of the many organizations that used the study to guide its work in the community.

EQUITY

Equal opportunity does not exist for all if barriers still persist for some. We can reverse patterns of inequity through interventions that target the root causes of disparities, many of which affect communities of color and stifle our region's vitality. The shared efforts and commitment of many are helping us overcome the obstacles and stark disparities that hold back our region. In partnership with donors, area leaders and community stakeholders, the Foundation has engaged in several strategic efforts to promote greater racial equity. We gathered data and perspectives to further refine grantmaking and move toward communitywide solutions that will address inequities.

We've made investments in improving access – to good jobs, better health, affordable housing, quality education and understanding each other. Programs assisting low-income residents gain the skills, experience and valid

driver's license necessary to obtain employment have received donor support. A series of convenings we've organized has furthered the conversation around criminal justice reform and access to housing. Concerted public policy efforts were made to expand the Wisconsin Reading Corps. Ex Fabula, a storytelling organization, has explored the difficult topic of race and segregation through a Foundation-supported fellowship program. With help from a commissioned study by the University of Wisconsin-Milwaukee's Center for Economic Development, we gained an unprecedented look at the conditions in and influence of our region's Latino community.

This kind of deepened commitment and broadened reach is helping unlock our region's true potential, which ultimately will help us become a world-class city attractive to new businesses and next generation leaders.

THANK YOU

Every year our family of generous philanthropists grows. We are grateful for their dedication, passion and commitment to our community.

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TOTAL # OF
FUNDS
1,306

.....
2016 NEW
FUNDS
47

NEW FUNDS

Betsy Barr Fund
Beam of Light Fund
Dr. Arno A. Bellack Memorial Fund
Bittachon Trust Fund
Caleb James Bond Fund
Joshua and Irene Brittingham Foundation Fund
Frank and Helen Burany Scholarship Fund
Caxambas Fund
Cedarburg Friends of the Library (CFOL) Fund
Chris and Heidi Chlupp Family Fund
Linda J. Diedrich Designated Fund
John Donald and Anna Irene Ferguson Fund
Jim and Judy Ford Scholarship Fund
Adam and Carole Glass Fund
GMF Impact Investing Pool
Martha J. and Marion C. Harvey Fund
Hobbs Family Fund
Howard and Susan Hopwood Fund
Helen M. Hrkel Fund
KPG Charitable Designated Fund
Medical Society of Milwaukee Foundation Fund
Milwaukee Bar Association Foundation Fund

Milwaukee Succeeds FAFSA Fund
Jabari Parker Charitable Foundation Fund
Sue A. Poston and John B. Poston Family Charitable Fund
Marvin Pratt Elementary School Designated Fund
Linda M. Raymonds Charitable Foundation Fund
Reasons for Hope MKE Fund
Rechtien Family Fund
Wallace and Marion Scheunemann Fund
Schloemer Family Fund
Richard and Margaret Schmidt Family Fund
Tim and Tonnie Schmidt Community Fund
SEAS Foundation Designated Fund
SEAS Foundation Endowment Fund
Shult Family Foundation Fund
St. Francis Historical Society Endowment Fund
St. Francis Historical Society Fund
Robert and Kathleen Tatterson Charitable Fund
Parker Thermansen Fund
Threshold Foundation Fund
Amy B. Underberg Fund
Valanju Family Charitable Fund
Dan and Sheila Vander Sanden Family Foundation Fund
City of West Bend White Bridge Fund
Walter A. Wilde Fund
Patricia Smith Wilmeth Scholarship Fund

NEW LEGACY SOCIETY MEMBERS

Stephanie and Marc Ackerman

Anonymous (3)

Blaise and Denise Beaulier

J. Gerard Capell and Julie Whelan Capell

Marilou Williams Chapman

Mr. and Mrs. Eric Erdman

Dean R. and Marjorie K. Fowler

Harriet Isabelle Johnson

Korey Johnson

Judith A. Keyes

James W. Kiefer

James and Janet Luty

Jonathan Pellegrin

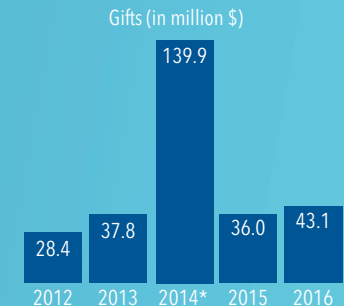
Sue A. Poston

William R. Puchner

Stephanie G. Rapkin

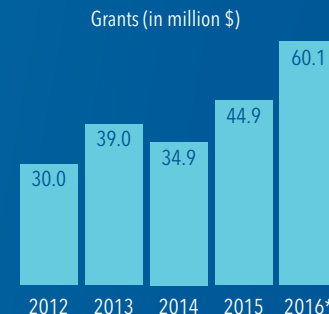
Sheila Vander Sanden

GIFTS \$43.1 MILLION



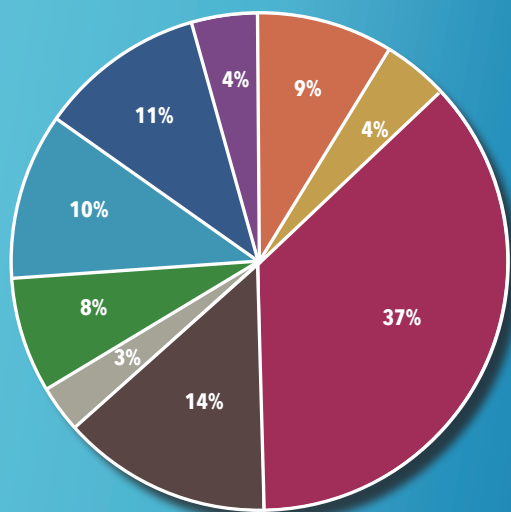
*Includes a \$100 million contribution from Sen. Herb Kohl for partially funding the construction of the new Milwaukee Bucks arena.

GRANTS \$60.1 MILLION



*Includes distributions of \$17.5 million to partially fund the construction of the new Milwaukee Bucks arena.

For the second consecutive year, community organizations and programs received a historic level of funding from the Greater Milwaukee Foundation thanks to the generosity of our donors who share the same goal of building a better community for all.



GRANTS BY INTEREST AREA

Arts and culture	\$5,412,878
Children/youth/family	\$2,484,979
Community development	\$22,027,586
Education	\$8,279,436
Employment and training	\$1,742,977
Environment	\$4,603,038
Health	\$6,398,836
Human services	\$6,519,514
Other*	\$2,645,022

*includes religious institutions, world peace, public affairs, philanthropy/volunteer, civil rights, awards and disaster relief



Greater Milwaukee Foundation

GRANTS BY COUNTY*

Washington County / **\$423,940** to **33** agencies

Ozaukee County / **\$910,307** to **52** agencies

Waukesha County / **\$1,822,175** to **144** agencies

Milwaukee County / **\$44,154,492** to **617** agencies

*Excludes grants made by our three partner foundations

PARTNER FOUNDATIONS /

Philanthropy is strong in our greater Milwaukee region thanks also to the grantmaking of our three partner foundations.*



Greater Cedarburg Foundation / \$255,348 to **41** agencies

Oconomowoc Area Foundation / \$570,372 to **68** agencies

West Bend Community Foundation / \$2,253,722 to **182** agencies

*Does not include Greater Milwaukee Foundation grants

Congratulations to the Oconomowoc Area Foundation, which is celebrating its 15th anniversary, and Maribeth Bush, the foundation's coordinator, who was named Oconomowoc's Citizen of the Year in 2016.

INVESTMENT PERFORMANCE



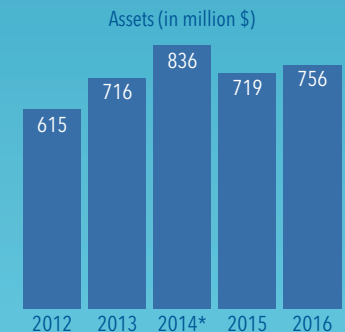
Dave Kundert
Investment Committee
Chair



Mike Miller
Colonial Consulting
Managing Director

Over the last seven years, the Greater Milwaukee Foundation's investment philosophy has earned a +7.7 percent annualized return, which is equivalent to a 68.1 percent cumulative gain. This outcome continues to be the product of the Foundation's decision to maintain a strategy that is driven by its long-term objectives while utilizing the size of its assets to access exceptionally capable investment management firms. Thanks to the highly capable oversight of the Foundation's Investment Committee, long-term returns have been well above target allocation benchmarks.

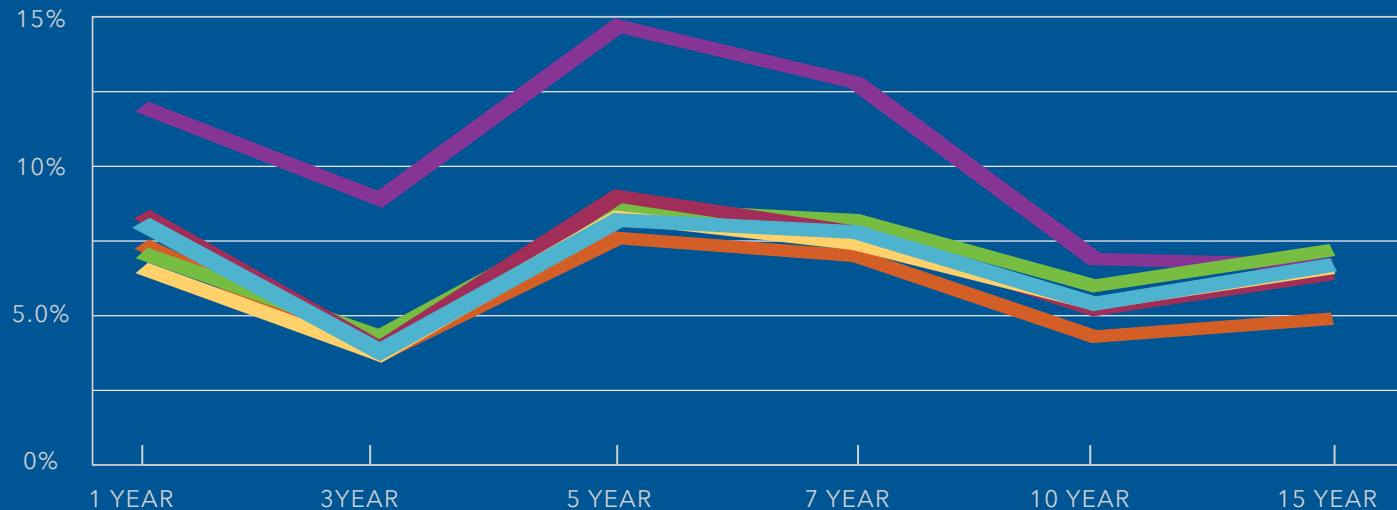
ASSETS \$756 MILLION



*Includes a \$100 million contribution from Sen. Herb Kohl for partially funding the construction of the new Milwaukee Bucks arena.

INVESTMENT RETURNS AS OF 12/31/2016

	1 year	3 year	5 year	7 year	10 year	15 year
GMF Investment Pool	8.1%	3.8%	8.2%	7.8%	5.4%	6.7%
U.S. Bank Trust Pool	6.6%	3.7%	8.3%	7.4%	5.4%	6.6%
BMO Harris Bank Trust Pool	8.4%	3.9%	9.0%	7.8%	5.2%	6.4%
JPMorgan Asset Management Trust Pool	7.1%	4.3%	8.6%	8.2%	6.0%	7.2%
S&P 500	12.0%	8.9%	14.7%	12.8%	6.9%	6.7%
Morningstar Moderate Allocation	7.4%	3.7%	7.6%	7.0%	4.3%	4.9%



GMF INVESTMENT POOL U.S. BANK TRUST POOL BMO HARRIS BANK TRUST POOL JPMORGAN ASSET MANAGEMENT TRUST POOL S&P 500 MORNINGSTAR MODERATE ALLOCATION



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