

Greater Milwaukee Foundation 2008 Annual Report



Strengthening communities
through effective partnerships

Greater Milwaukee Foundation 2008 Annual Report

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Our Mission

Strengthening Communities through Effective Partnerships

is driven by our core values

Integrity, Effectiveness, Respect, Transparency, Innovation,
Diversity, Equity, Inclusiveness, Collaboration

to create a vision of the Foundation as

An effective partner that develops,
supports and advocates for projects,
programs, and policy changes that
strengthen communities in
measurable and sustainable ways.

a philanthropic leader and partner with the community.

To help our donors grow their philanthropy in support
of the organizations and causes important to them;

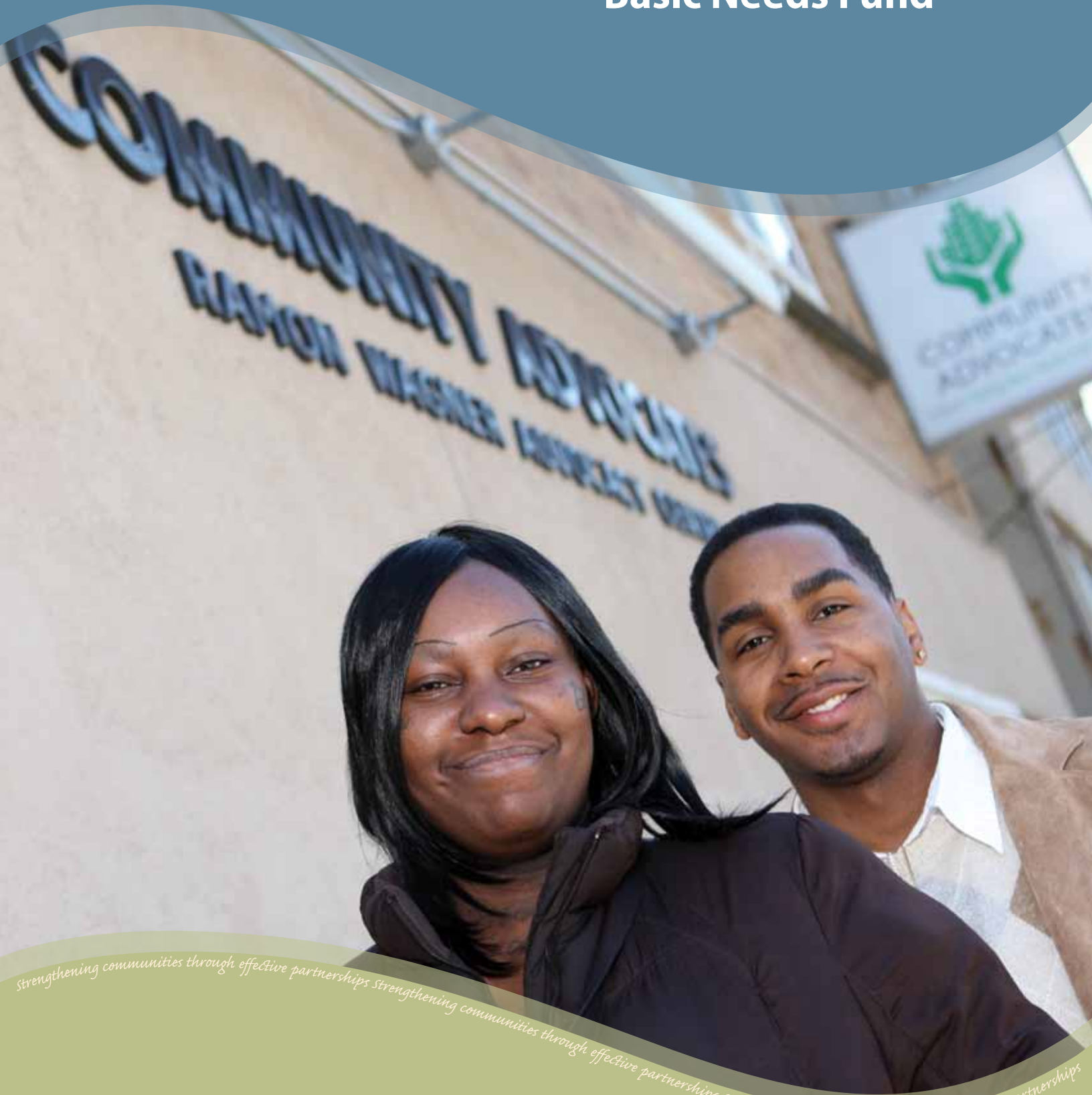
To address critical community needs as an active
grantmaker and convener; and

To advocate for change to better serve
people and their communities.



Leadership Profile

Basic Needs Fund



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Economic downturn, increasing poverty prompt Foundation to create Basic Needs Fund

It's been a tough year for Conswalla Williams. The single mom of three has undergone two surgeries since January. She's struggled to keep up with bills, including rent. In April, her landlord gave her a week's notice she would have to leave, a move that would have been inevitable had it not been for Community Advocate's homeless prevention program.

"Sometimes it seems like when you are down, God sends a blessing your way," said Williams, who received a one-time check to cover her rent.

Maudwella Kirkendoll, a Community Advocates case manager, also views it as a blessing. The agency's funding for the program is limited and only a fraction of the people who need help get it. Williams initially didn't make that cut. But the agency was able to help her thanks to funding it received from the Greater Milwaukee Foundation's **Basic Needs Fund**.

With more people struggling under the weight of the collapsing economy, the Foundation took the unprecedented step of creating the special fund to immediately help nonprofits keep up with the demand. The Basic Needs Fund was created with \$300,000 from discretionary funds as well as an additional \$88,000 from Foundation donors, the Faye McBeath Foundation and the general public.

"Before when we have focused on poverty, it was about how to prevent people from falling in or how to pull people out," said James A. Marks, Foundation vice president and director of grant programs, about the Foundation's grantmaking. "This is a whole different take on it."

The Foundation's informal survey of local shelters and food banks found demand was up 10 to 25 percent over the previous year and more women and children as well as first-time users relied on those agencies. Food and other donations, however, had not kept pace.

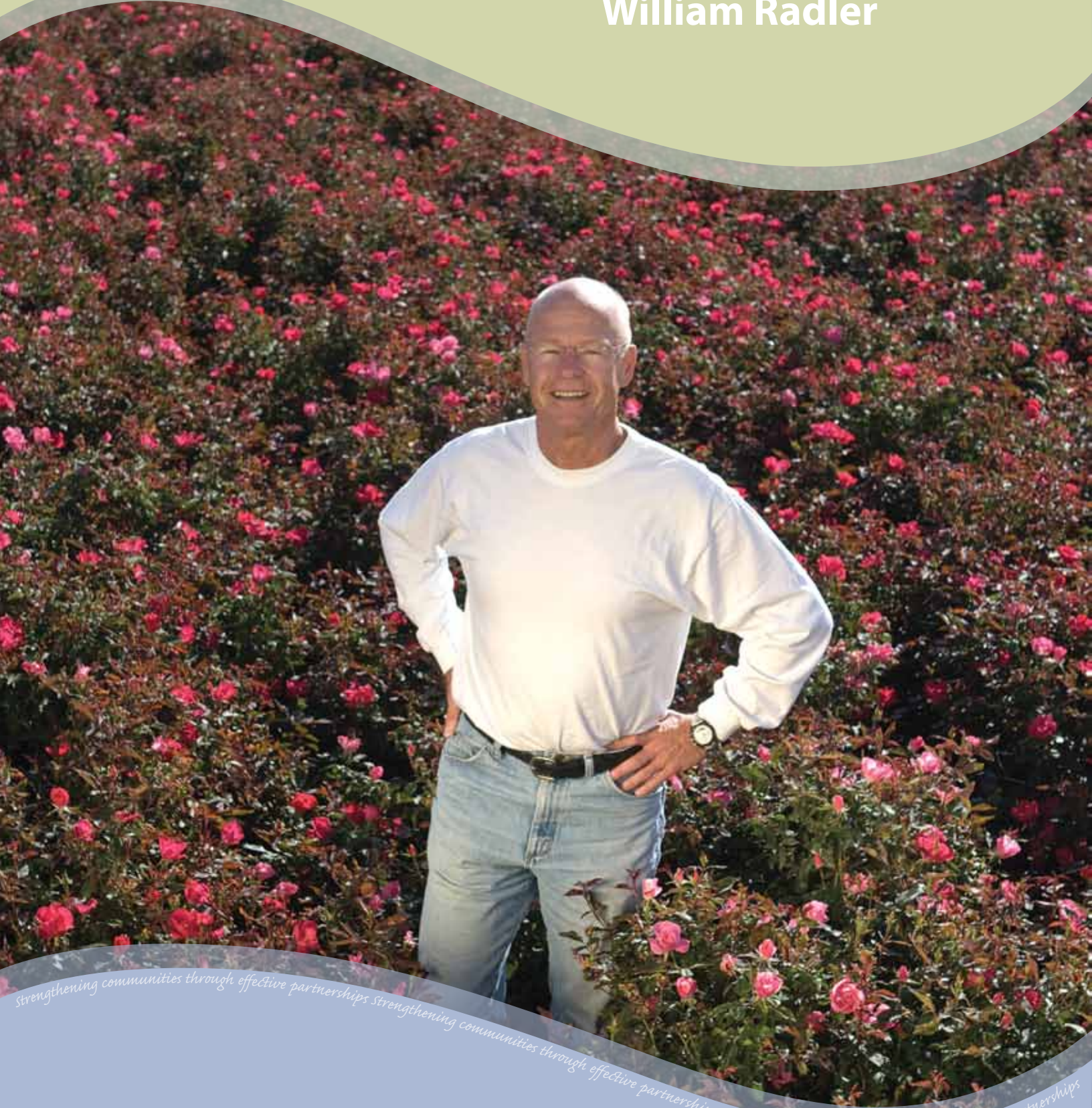
The Foundation allocated \$110,000 to Second Harvest of Wisconsin, Hunger Task Force and Waukesha County Food Pantry to purchase additional food. The remainder helped 14 agencies meet emergency shelter, clothing and other operational expenses.

Though the fund helped address the current crisis, Marks believes the demand will continue. As a result, the Foundation will focus 2009 grantmaking on programs that address emergency needs as well as persistent poverty.

"We'll do our best to monitor (the situation) and see what it is that we can do to help," Marks said.

Donor Profile

William Radler



Strengthening communities through effective partnerships Strengthening communities through effective partnerships Strengthening communities through effective partnerships

Resilient rose gives root to donor's philanthropy

Bill Radler fell in love with roses as a boy, but at the time, it was little more than a hobby and happenstance.

He needed a way to avoid boredom while at his grandparents' home and their rose catalogs provided that escape. Radler bought and planted his first rose bush at age 9 and when it bloomed that year, so too did a new career path.

Radler earned a degree in landscape architecture and spent 23 years with Milwaukee County Parks, including 13 as director of Boerner Botanical Gardens. He now is a full-time rose breeder and full-blown plantaholic.

Radler said there is no perfect rose. However, over the years, he has devoted every spare minute trying to breed the hardiest, most disease-resistant one. From the seedlings he nurtures in his basement to the trial gardens set up in his back yard, every spare corner of his 1-1/2 acre property is part of his "rose boot camp."

Hybridization is by trial and error, but his results have been a Knock Out®, the official name of the

family of roses that were introduced in 2000. The original Knock Out® is now the most widely-sold rose in the world.

After Radler started receiving royalties from Knock Out® sales, he realized his potential at leaving a legacy. He turned to the Foundation because of his familiarity with the support it gave to the Friends of Boerner Botanical Gardens.

"It was less work and less worry," said Radler, who started the **William J. Radler Fund** in 2004. "I definitely need that."

He chose a donor advised fund because it gave him flexibility to support the causes about which he cares. In addition to Boerner, Radler is an avid supporter of the American Rose Society as well as gay and political causes.

"I hope my legacy is letting people know not to hesitate on doing what that little voice inside tells you to do, the voice that lets you know what you enjoy," Radler said. "By seeking that out, you'll be rewarded with enjoyment and you might luck out like I did."

Grantee Profile

Our Space



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Our Space creates built-in recovery community at new apartment building for the mentally ill

Gone are the days where Steve Fulton has to worry about cracked floors, cramped space, bug-infested furniture and questionable neighbors. For six years, those were common elements in his life.

In September, he moved to a new apartment on the city's north side. While only a few miles away, it places him miles ahead in his recovery from his addictions and mental illness.

"You can't beat this place," said Fulton, one of 24 residents at United House, a new building at 2500 W. Center St. which is the first supportive housing development in Milwaukee County for people with mental illness.

Fulton's new one-bedroom apartment, with plenty of natural light and space, provides him a new lease on life. He raves about the building's warm colors, cleanliness and affordability. But just as important to Fulton is the built-in community of people who face the same challenges.

Through a \$40,000 grant from the Greater Milwaukee Foundation, **Our Space** helps residents like Fulton cope with their illness and live independently through onsite supportive services. Peer support specialists, people with mental illness

who are advanced in their recovery, help residents create crisis management plans and check in with them daily. They also coordinate support groups and social activities like medication management, cooking class and Tai Chi.

All activities are voluntary and have proven popular not only among residents, but also among their family and friends. Staff say that kind of participation keeps residents engaged and, as a result, out of jail or the hospital because of a psychiatric crisis.

"What this saves the community in money is enormous," said Joan Lawrence, Our Space's executive director.

Though United House provides permanent housing, Lawrence would ultimately like to see residents reach the point where they can transition into the community and give others a chance to move in. Thirty people are on the waiting list.

Fulton does hope to move on one day. United House and Our Space are helping him in that direction.

"I feel confident," Fulton said. "I feel motivated to get out there and do what I've got to do every day. It's a blessing to be in a place like this."

Leadership Profile

Community Partnerships



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Donor Profile

Lawlis Family Fund



strengthening communities through effective partnerships *strengthening communities through effective partnerships* *strengthening communities through effective partnerships*

Couple's generosity and values live on through charitable fund

Faith, family and helping the less fortunate were fundamental values that shaped the lives of Kirby and Mary Anne Lawlis throughout their nearly 50 years of marriage.

The two have since passed away, but through their donor advised fund and the guidance of their children as successor advisers, the couple is leaving a legacy that keeps those values alive.

"They led by example," said Joanne Schulz, the eldest of the couple's five children. "They saw a need and they volunteered."

Helping others was second nature to the couple, who met on a blind date in 1953 and married two years later. Kirby was a longtime member of the Knights of Columbus, a grade school basketball coach and one of the founders of Keep Greater Milwaukee Beautiful. Mary Anne was a Girl Scout leader and regular fixture at her children's sporting events. Both were active at Mequon's Lumen Christi Catholic Church.

The couple created the **Lawlis Family Fund** in 1994 with money Kirby received from selling the Miller Brands distributorship he led for 11 years. They felt blessed and wanted to do something to provide ongoing support to their favorite organizations and causes.

One of those shared passions was education.

Mary Anne, a former teacher, and Kirby made sure their children had a Catholic education. That interest lives on through their fund, which supports Catholic and central city schools like Nativity Jesuit Middle School, among other organizations.

When Kirby passed away in 2002, Schulz helped her mother with the grantmaking. After Mary Anne passed away in 2008, Schulz and her sister, Trish Hilbert, became successor advisers.

Schulz describes their new role as similar to taking a new job.

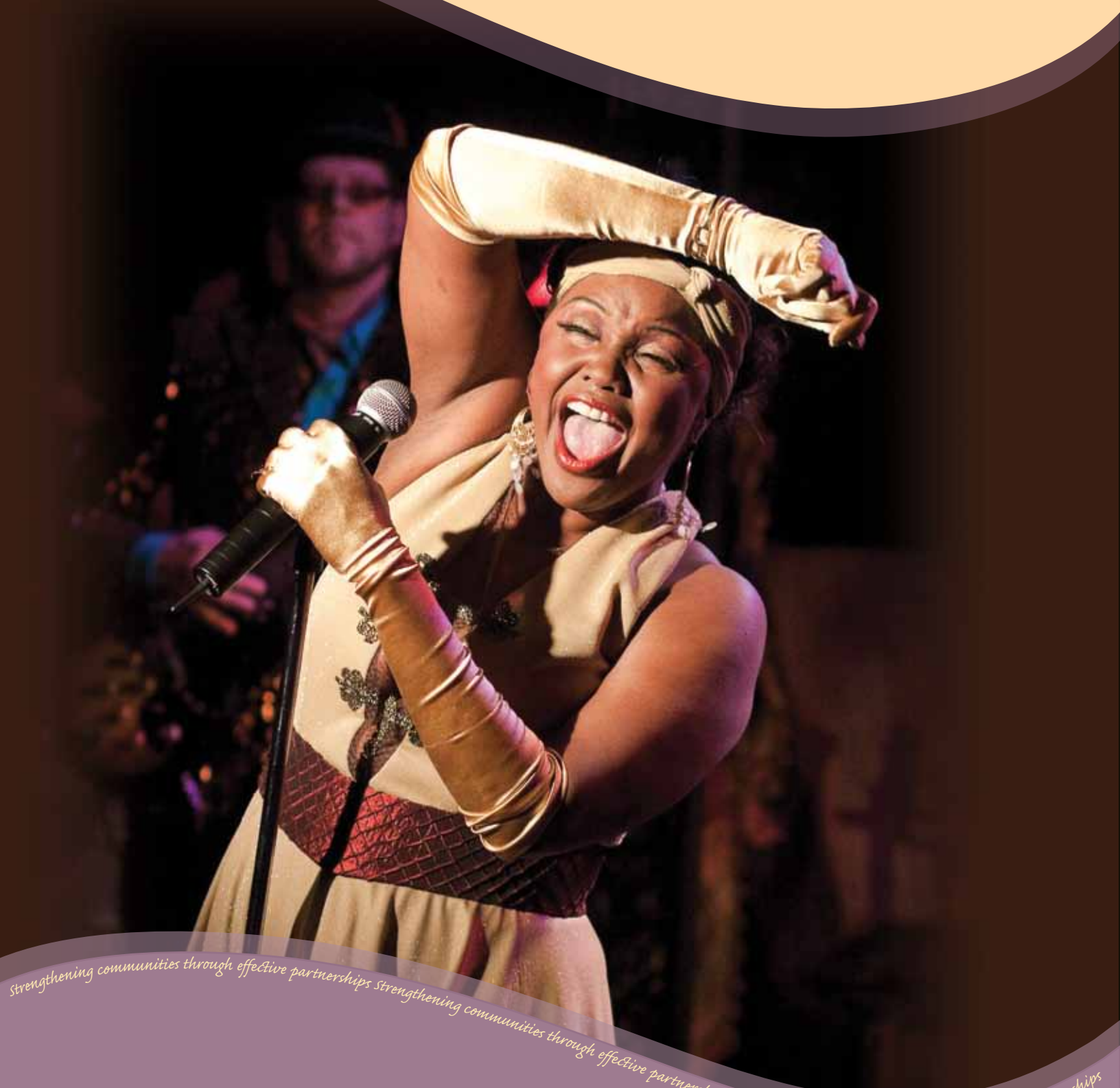
"You are trying to feel it out and figure out what's the best way to do it," she said.

For now, that means maintaining support to the more than dozen and a half organizations the Lawlises helped annually. Schulz foresees possibly expanding the number of organizations and causes, while maintaining their parents' intent.

"We certainly feel very fortunate we are able to provide resources to areas that are so much in need, especially in the economic situation that we are in," Schulz said.

Donor Profile

High Point Fund



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Advocating for African-American arts

Art helps define who we are and what is important to us. **High Point Fund: Supporting African American Performing Arts** was created to foster awareness in the community of the unique and important role African-American performing arts groups play in defining Milwaukee's artistic and cultural identity.

Milwaukee is home to nearly a half dozen African-American performing arts organizations. Some, such as Ko-Thi Dance Company and Hansberry-Sands Theatre Company, have been part of Milwaukee's cultural landscape for decades. But all of the organizations have traditionally operated with very lean budgets, with little funding available to promote professional development, expand staff, or mount more complex productions.

"Gifts have come mostly from small contributions from individuals in the black community who care about the arts and the community," says Venora McKinney, a co-founder of High Point and one of the driving forces behind the fund. "But we've been fortunate to also have a great partner in the

Milwaukee Rep, which allows the High Point Fund to have one performance a year for a fundraiser. This year it was 'Fire on the Bayou: A Mardi Gras Musical Extravaganza.'" Close partnerships with the Milwaukee Rep and a number of local foundations have also helped the fund reach a goal of \$200,000 to provide permanent support for Milwaukee African-American performing arts organizations.

The organizing groups – African American Children's Theatre, City Ballet Theatre, Hansberry-Sands, The Heritage Chorale of Milwaukee and the Milwaukee Rep – were brought together by co-founders McKinney and Sarah O'Connor. Each group now receives an annual grant that can be used to help the organizations strengthen their ability to enhance Milwaukee's African-American performing arts.

The name for the fund represents a "high point" when the participating groups and the community came together to support the important work of Milwaukee's African-American performing arts groups and artists. The High Point Fund – and those who support it as well as those who benefit from it – will continue for years to come.

Leadership: 2008 and beyond

Strengthening communities through effective partnerships



Board chair Judy Jorgensen, President Doug Jansson



Board members: Franklyn M. Gimbel, Patti Brash McKeithan, Thomas L. Spero

Dear Friends,

In some ways, 2008 may be described as the year we never saw coming. A series of cascading economic events wreaked havoc in the United States and around the world. From the Dow Jones record high of 14,164 in October 2007 to a close of 8,776 at the end of 2008, the markets' fall was stunning. Even Warren Buffett was shaken, saying that "...the nation is engaged in an economic war."

The greater Milwaukee area has been on the frontlines of that battle. Food pantry use jumped 25 percent in 2008. Individuals and families devastated by the economy filled local homeless shelters to capacity. Even some of our more affluent communities saw individuals who once supported food pantries now waiting in line for assistance themselves.

Last year was a challenging year for the Foundation as well. Our assets fell 25 percent to \$429 million. Despite that disappointment, our diversified investment philosophy continues to offer a buffer from even deeper losses. Last year, our portfolios outperformed the S&P 500 – which lost 37 percent – and the Morningstar Balanced Mutual Index Fund, which dropped 28 percent. Overall, Foundation investments have outperformed both the S&P 500 and Morningstar for the past 10 years.

This news should provide some comfort for donors, not only in the long term, but for the short term as well. Our spending policy is based on a five-year average of market values. This philosophy lets funds work like a charitable reservoir, providing a dependable flow of income for grantmaking through both bountiful years and lean. Because our focus has always been on achieving long-term gains rather than chasing short-term benefits, donors will see no significant difference in the funds available for grantmaking in 2009.

Despite the economy, the Foundation was able to accomplish much in 2008.

- Foundation donors and friends made more than \$37.4 million in gifts. It's our third best year ever for gifts, which is a testament to the confidence and trust individuals have in the Foundation, even during tough times.
- We had a record year for grantmaking, providing more than \$32.2 million in grants to organizations in metropolitan Milwaukee, around the country and the world.
- The Foundation took a lead role in addressing critical food and shelter needs in metropolitan Milwaukee with the creation of the Basic Needs Fund. A total



Board members: Joan M. Prince, David Lubar, Wendy Reed Bosworth



Board members: Ness Flores, Janine Geske, Peter W. Bruce, John W. Daniels Jr.

Not pictured: Frederick P. Stratton Jr.

of \$388,000 was contributed to the Fund. Grants of \$362,500 assisted 17 food and shelter organizations stretched thin by the economy and increased demand.

- We adopted a new mission statement, "Strengthening Communities through Effective Partnerships," which reflects the focus of the Foundation's work as we prepare to enter our second century of service to donors and the community.
- As a service to donors and in compliance with the Pension Protection Act, the Foundation expanded its due diligence process in grantmaking. Staff performs more in-depth reviews of the financial and governance records of nonprofits to make sure there are no significant issues or concerns.

Our efforts in 2008 also shifted beyond our traditional role of grantmaking. The Foundation expanded its role as a philanthropic leader through our new Department of Community Partnerships. Led by Marcus White, Community Partnerships is actively identifying and researching community issues and working with broad-based coalitions to bring about the changes that will help all of the communities we call home reach their fullest potential. In less than a year, we've accomplished a lot.

- Interviews with 145 community leaders from throughout the metropolitan area reinforced education as the number one concern, with jobs/economic development and transportation also seen as key issues.
- A small convening of key individuals in early childhood education identified concerns facing the field and steps needed to address those issues.
- With increased discussions about the future of Milwaukee Public Schools, the Foundation commissioned a study to examine what's happened in communities where there has been a change in school board governance. In addition to expanded coverage on our website, we also hosted a community forum, which was televised on Milwaukee Public Television, on the findings in conjunction with the Public Policy Forum and the Marquette University Law School.

Last year was tough. No one is sure what 2009 will hold. But the Foundation and its donors are well positioned to not only respond to current needs, but to identify issues and work collaboratively with other stakeholders to solve the problems facing the metropolitan area.

Sincerely,

Judy Jorgensen, board chair

Doug Jansson, president

2008 Financial Reports

Foundation looks forward to economic recovery



Consultant:
Michael A. Miller, managing director
Colonial Consulting Corp., New York, NY

From a strictly financial perspective, most of us are more than anxious to say good riddance to 2008. While the calendar now marks a new year, the implications of the time that's now passed will be discussed and experienced for quite some time.

From the optimist's perspective, however, it is certainly reasonable to argue that a loss of confidence combined with a breathtaking pursuit of safety and liquidity undoubtedly creates massive opportunities. History tells us that periods such as these ultimately produce large future gains, while euphoria ultimately delivers varying degrees of devastation.

The good news is that this time will be no different, although we must be willing to face the fact that this crisis is entirely unique and that the lessons we have acquired from prior experience may not be an exact guide for these times. While no one can be certain where markets head from here, the Foundation will continue to seek ways to capitalize on opportunities while also maintaining a disciplined and forward-looking process for managing risk.

Key tenets of this philosophy are:

- Support for donor funds in perpetuity. This is accomplished by earning returns that are at least equivalent to the Consumer Price Index plus what each donor has available to "spend" on grantmaking. To achieve this level of return means that we must make a significant investment allocation to higher returning asset classes.
- Establish a strategic asset allocation, which is expected to achieve the portfolio's return objectives while also maximizing return for the level of risk assumed
- Avoid the temptation to market time or broadly change strategy based on current conditions/near term outlook
- Diversify the portfolio by asset class and strategy as this increases the likelihood of achieving return objectives under different economic/market conditions

We expect this philosophy, combined with careful monitoring by the Foundation's highly experienced Investment Committee, to continue the important work of achieving the investment goals that are so critically important to the Foundation, its donors and the greater Milwaukee community.

In the year ahead, we know our mission, we have our tenets and we will pursue the Foundation's investment goal of producing returns that allow assets to grow, while supporting the philanthropic spending of Foundation donors.

Investment returns

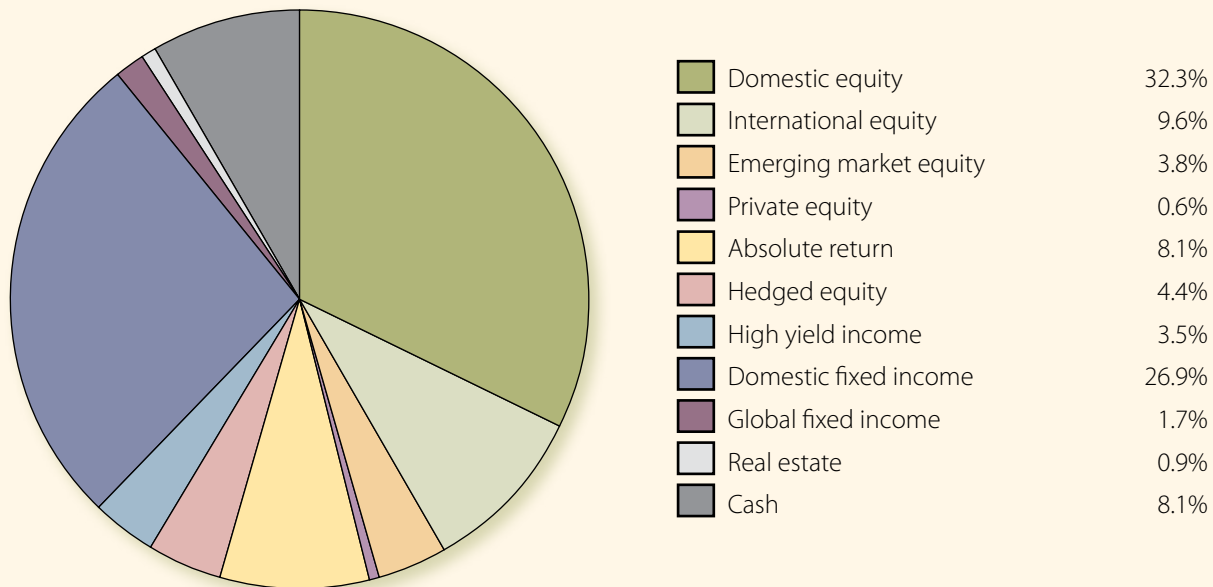
(Annualized period ending Dec. 31, 2008)

	1 year	3 year	5 year	7 year	10 year
S&P 500	-37.0%	-8.4%	-2.2%	-1.5%	1.7%
Morningstar Balanced Mutual Index Fund	-28.2%	-5.4%	-0.6%	0.4%	0.9%
GMF Investment Pool	-25.6%	-2.6%	2.1%	3.4%	3.8%
U.S. Bank	-26.7%	-3.0%	2.0%	3.1%	2.8%
M&I	-28.2%	-3.7%	1.5%	2.5%	3.1%
JPMorgan	-26.4%	-2.8%	2.1%	3.4%	4.0%

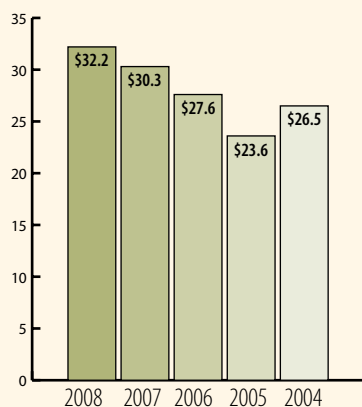
A balancing act that provides long-term results

Protecting donors' investments has been of key importance to the Foundation since our founding in 1915. It's a tradition that continues today, especially in the current economic environment. The Foundation's volunteer Investment Committee of highly experienced experts and Colonial Consulting, our New York City-based investment consultant, believe a diversified investment portfolio offers the best balance between opportunities for long-term growth and protection during difficult economic times.

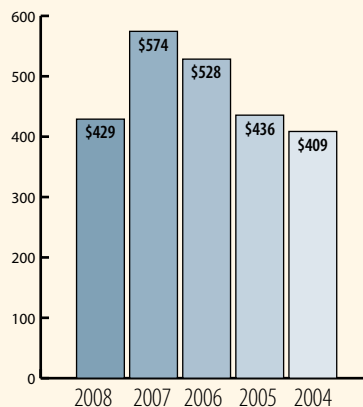
Asset Allocation (as of 12/31/2008)



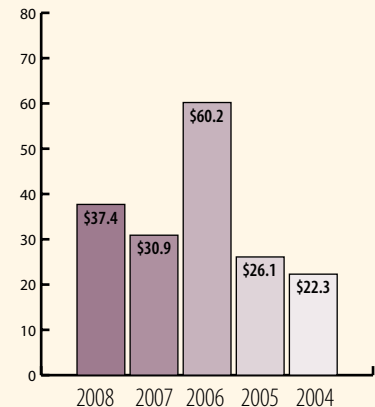
Grants (in millions)



Assets (in millions)



Gifts (in millions)



2008 Financial Reports

2008 and 2007 summary financial statements

(unaudited, in thousands)*

Assets

Receivables, prepaids and other assets
Investments, cash and cash equivalents
Beneficial interest in charitable trusts

Total assets

	2008	2007
Receivables, prepaids and other assets	\$ 1,154	1,077
Investments, cash and cash equivalents	424,373	568,505
Beneficial interest in charitable trusts	3,919	4,851
Total assets	\$ 429,446	574,433

Liabilities and net assets

Accounts payable and accrued liabilities
Grants payable**
Net assets

Total liabilities and net assets

Accounts payable and accrued liabilities	\$ 748	801
Grants payable**	22,193	17,936
Net assets	406,505	555,696
Total liabilities and net assets	\$ 429,446	574,433

Revenues

Contributions
Net investment return
Change in split interest agreements

Total revenues

Contributions	\$ 37,409	30,992
Net investment return	(146,124)	48,139
Change in split interest agreements	(1,272)	269
Total revenues	(109,987)	79,400

Grants and expenses

Grants approved**
Program expenses
Custodial and investment management fees
Administrative expenses

Total grants and expenses

Grants approved**	32,716	29,762
Program expenses	1,641	958
Custodial and investment management fees	756	619
Administrative expenses	4,091	3,622
Total grants and expenses	39,204	34,961

Change in net assets
Net assets, beginning of year
Net assets, end of year

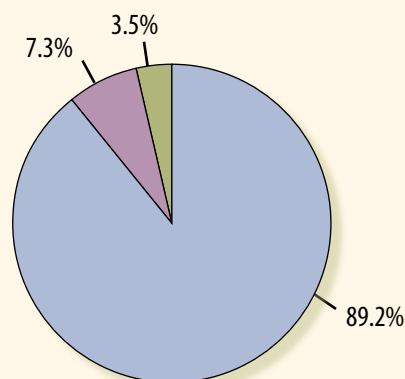
Change in net assets	(149,191)	44,439
Net assets, beginning of year	555,696	511,257
Net assets, end of year	\$ 406,505	555,696

* The Greater Milwaukee Foundation is audited annually by KPMG, LLP. Due to audit requirements related to investment reporting, the financial statements shown above are presented with unaudited results. The final 2008 audited statement is expected to be available by the end of September 2009 and can be found on our website, www.greatermilwaukeefoundation.org, in the Donors section under investment information.

** Grants payable and grants approved include accounting adjustment for the valuation of multi-year grants.

2008 Expenditures

- Grants and program expenses
- Management and general expenses
- Development and donor services expenses

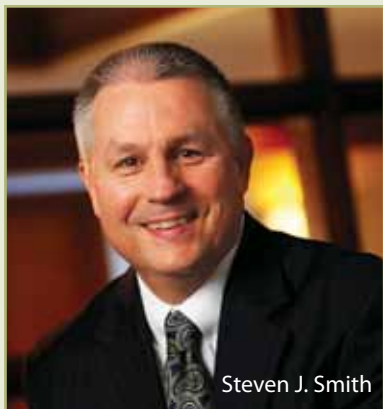




Sister Edna Lonergan



Jeannetta Simpson-Robinson



Steven J. Smith



Cordelia Taylor

Honoring exceptional civic leaders

For more than 50 years, the Greater Milwaukee Foundation has recognized the work of local civic leaders whose efforts improve the lives of others. The William C. Frye Award honors individuals whose volunteer efforts contribute toward the betterment of the community. The Frank Kirkpatrick Award acknowledges the work of those who have contributed to the physical improvement of greater Milwaukee. Both awards have a strong and rich tradition of recognizing some of the most respected civil leaders in the metropolitan area.

Nominations are submitted by donors and friends of the Foundation. Final selection of honorees is made by a committee of the Foundation Board and approved by the full Board.

William C. Frye Recipients

For 25 years, **Sister Edna Lonergan** has been the key player behind the continuing success of St. Ann Center for Intergenerational Care. Recognized by the Holy See at the United Nations World Conference on Aging as a model for intergenerational care, St. Ann's provides stay-healthy programs for hundreds of children, elderly and people with disabilities in a state-of-the-art, home-like setting on Milwaukee's south side.

"Love in Action" is not only the motto of Career Youth Development, but also

of its founder, **Jeannetta Simpson-Robinson**. Robinson started CYD in 1970 in her north side home and under her leadership, it has grown to become a force for good in Milwaukee's central city with more than 20 programs ranging from alternative schools and adult basic education classes to first-time homebuyer programs. Simpson-Robinson passed away in October 2008.

Frank Kirkpatrick Recipients

Steven J. Smith, chairman and CEO of Journal Communications, has been on the ground floor of many key Milwaukee-area programs including Safe & Sound and Milwaukee 7, the cooperative regional economic development effort. Smith is a trustee of the Faye McBeath Foundation and the St. Josaphat's Basilica Foundation. He is also on the advisory board for the Faith in our Future Campaign of the Archdiocese of Milwaukee.

Cordelia Taylor is the founder and driving force behind Family House, a 20-year old community-based residential facility for senior citizens in need of care. This home-like setting has been replicated in communities worldwide. A recipient of the AARP Impact Award, Taylor is also launching Faith Haven, a new facility that will house the only medical clinic in her zip code as well as after-school and summer programs for youth.



Leadership Projects

The Greater Milwaukee Foundation has a long history of identifying important community needs and concerns and working with our donors to support programs that bring about positive change. Our leadership projects are just one example of that strong tradition. These projects stand out by the significant amount of time or money the Foundation has invested toward their development, the collaboration with other donors and community partners and the measurable outcomes and impressive results.

COMPASS Guide

Having the desire to go to college is one thing, but having the financial wherewithal to do so is another – particularly for low-income or minority students. COMPASS Guide, a Web-based education information clearinghouse, helps point students in the right direction. With information on careers, colleges, financial aid, apprenticeships and scholarships, the guide has become a hub for college planning. More than 1,000 users visit the website each month to search through the 720 local scholarship sources worth more than \$4 million. In 2008, COMPASS Guide reached an additional 12,000 people through its outreach programs.

Earned Income Tax Credit SuperSites

Creating opportunities for the working poor is one of the most effective ways to address poverty. At Foundation-sponsored Earned Income Tax Credit SuperSites in Milwaukee and Waukesha, low-income residents receive free tax preparation as well as enroll in other health and social service-related programs for which they qualify. Since its start in 2002, the program has generated more than \$69 million in total tax refunds for low-income families.

Healthy Neighborhoods Initiative

The Healthy Neighborhoods Initiative is a collaborative effort between the Foundation and the city of Milwaukee that seeks to revitalize Milwaukee neighborhoods that are at a tipping point. Seven neighborhoods are involved in the program, which focuses on a neighborhood's positive

attributes and works to engage neighbors and homeowners to invest in their neighborhoods and position them as good places to live.

Helen Bader Institute for Nonprofit Management

The nonprofit academic institute, Wisconsin's first, has improved the leadership capacity and effectiveness of area nonprofits through educational events, technical assistance, research and professional development. Alumni of its graduate-level programs are making their mark at local nonprofits and future leaders already are in the pipeline.

International Forgiveness Institute

Forgiveness is a crucial element needed to move beyond anger and hurt, but it is not an easy thing to do. Through its forgiveness curriculum, The International Forgiveness Institute teaches children at select Milwaukee central city schools how to forgive so that they can better learn and grow. Nearly 2,000 children have learned about the concept since the program began in 2004.

Mequon Nature Preserve

Outside of city parks, a square mile of undeveloped land in the suburbs is virtually unheard of nowadays. In Mequon, however, that concept is becoming a reality. Through a partnership between the city of Mequon, Ozaukee Washington Land Trust and the Foundation, nearly 700 acres are being set aside to form the Mequon Nature Preserve. To date, more than \$11 million has been raised to help restore the area to its 1830s condition.

Milwaukee Crisis Resource Center

The Milwaukee Crisis Resource Center, which opened in December 2007, is a public/private partnership that provides crisis prevention and recovery services for people with mental illness. The center uses an urgent care-like approach

where people can get a mental health assessment to prevent crisis, help managing a current situation as well as referrals to services that can help with recovery. Since opening its doors, the center has served more than 200 people.

Mosaic Partnerships

Mosaic Partnerships is based on a model through which relationships can be built across race and trust can be fostered in order to bridge the city's racial divide. The program pairs leaders of the community across race and/or ethnicity and guides them through a one-year process of relationship, understanding, and trust building. Over the past three years, more than 500 community leaders have participated.

New Leaders for New Schools

Strong principals create strong schools. Through a national initiative called New Leaders for New Schools, the Milwaukee Public Schools district is working to ensure that it has the next generation of quality school leaders in place. Four program graduates have already been appointed as principals and 16 new residents started the program in 2008.

Nonprofit Management Fund

The Nonprofit Management Fund, a collaboration of 11 private funding groups, understands that in order for local nonprofits to effectively serve their clients and the community, the organizations themselves need to be strong and effective. The 15-year-old consortium works to strengthen the management and efficiency of the nonprofit sector in Milwaukee, Ozaukee and Washington counties by providing funding and expertise.

Nonprofit Management Fund – Waukesha

Following the success of the Nonprofit Management Fund that serves Milwaukee, Ozaukee and Washington counties,

a similar consortium was set up in 1998 to specifically serve Waukesha nonprofits. The group of eight funders provides grants to help organizations with areas including fundraising, technology, strategic planning and marketing.

Project Lead the Way

Engineering and technology are promising and profitable careers – yet they often remain intimidating choices for students who struggle to understand the concepts until they realize the social relevance. Project Lead the Way helps middle and high school students make that connection by giving them a hands-on, project-based introduction to the skills needed for careers in science, technology, engineering and math. Forty-eight middle and high schools in metro Milwaukee have instituted the curriculum. Wisconsin has the third largest number of school districts in the country participating in the program.


Sponsor-A-Scholar

Highly motivated low-income Milwaukee high school students have an opportunity to pursue their college dream through Sponsor-A-Scholar, a mentoring program operated by the YMCA of Metropolitan Milwaukee. The program provides academic assistance and preparation throughout high school and a scholarship. Since the program began 13 years ago, 98 percent of participants have graduated high school and 97 percent have continued on to postsecondary opportunities.

Urban Education Fellows Program

Through an innovative teacher preparation curriculum, the Urban Education Fellows Program is bringing new teachers and new strength to Milwaukee's private schools. The alternative teaching certification program, jointly offered by Mount Mary and Alverno colleges, enables individuals to earn a teaching certificate for grades one through eight as well as a master's degree in education while teaching full time. The program has produced 56 graduates, 50 of whom are still teaching.





Partner foundations and supporting organizations

Through our partner foundations, we provide services that help donors maximize their charitable giving and support the work of dozens of local organizations. Each partner foundation has a volunteer advisory board of local leaders who know the needs and strengths of their individual communities. Our partner foundations are able to focus their efforts on local grantmaking, while the Foundation provides administrative support and investment expertise.

Greater Cedarburg Community Foundation Fund

The Greater Cedarburg Community Foundation Fund is creating an endowment and legacy for Cedarburg for generations to come. With gifts to this fund's unrestricted or named funds, donors connect to community needs and contribute to the artistic, cultural and community service projects that help secure Cedarburg's civic vitality.

For more information on the foundation, its founders and for a full list of associated funds, visit www.cedarburgfoundation.org.

Oconomowoc Area Foundation

The Oconomowoc Area Foundation was established to support charitable programs in the communities within the Oconomowoc Area School District, and Wales, Ottawa, Dousman, Chenequa and Nashotah. It also helps area residents fulfill their charitable goals. It builds on the success of the Scherffius Fund. Hilbert N. Scherffius, a lifelong Oconomowoc resident, ran Lorleberg's True Value Hardware and established a fund at the Greater Milwaukee Foundation to perpetually benefit the community he loved.

For more information on the foundation, its founders and for a full list of component funds, visit www.oconomowocareafoundation.com.

West Bend Community Foundation

Launched by West Bend civic leaders Cliff Nelson and Doug Ziegler, this supporting foundation's nine-member board is made up entirely of West Bend residents and supports projects benefiting that community. The organization

gives donors an opportunity to create unrestricted, field of interest and advised funds that are permanently dedicated to benefit the causes they care about most.

For more information on the foundation, and its component funds, visit www.westbendcommunityfoundation.com.

Below is a list of new funds created in 2008:

Greater Cedarburg Community Foundation Fund

Jean and Dennis Schrank Scholarship Fund

Oconomowoc Area Foundation

Schumann Family Funds

West Bend Community Foundation

Tom and Pat Strachota Foundation Fund

M.K. Strachota Fund

Margaret G. Ziegler Charitable Foundation

Supporting organizations

A supporting foundation is like a private foundation, but is easier to operate and enjoys better tax advantages. Its ties to the Greater Milwaukee Foundation allow donors access to a wide range of support services and same degree of involvement as a donor advised fund, but gives greater visibility.

A supporting foundation may have its own board, letterhead, counsel and investment manager. It also may publish its own annual report and other materials.

The Foundation's eight supporting foundations are:

- Bucyrus Foundation, Inc.
- Hepburn "Bootstrap" Foundation
- Honkamp Family Foundation
- Jay Kay Foundation
- Oconomowoc Area Foundation
- Strattec Foundation, Inc.
- The Ceres Foundation, Inc.
- West Bend Community Foundation, Inc.

Starting a fund

The ease of starting a fund is just one of the reasons donors say they turn to the Foundation to help fulfill their charitable goals. With a minimum gift, limited paperwork and guidance from a financial adviser or Foundation staff member, donors can easily create a personal, permanent and powerful legacy.

Decide on a giving timeline

If donors wish to have their gifts go to work immediately, they can create a fund with a gift of cash or appreciated assets, such as securities and real estate. If they wish to give later, they may set up a fund through a deferred gift such as a bequest, charitable remainder trust or retirement plan.

Design the fund's charitable purpose

Donors may select one or more of the following fund options to best meet their charitable goals:

- Advised funds, a popular alternative to a private foundation, are designed for donors who wish to retain the ongoing power to recommend grants, an option also available to future generations.
- Unrestricted funds give the Foundation the ability to address the community's highest priorities and changing needs.
- Field of interest funds focus on a specific interest area, such as education, or a particular geographic area.
- Designated funds allow donors to provide ongoing support for one or more nonprofits that they specify.
- Agency endowments are established by nonprofits to create a permanent funding source and ensure their long-term sustainability.

- Acorn accounts give donors a chance to build their funds over time. With a monthly \$100 gift, donors can create an Acorn and grow it through a combination of regular contributions and accrued income.
- Supporting foundations are affiliated organizations that share the Foundation's mission and management. Compared to private foundations, they offer easier operation, better tax advantages and lower operating costs.

Select a name

A fund's name stays with it forever, maintaining a donor's charitable presence in the community. Donors may choose to name their fund after their family, in memory of a loved one or to reflect the causes donors care about the most. A fund can also be anonymous.

Choose an investment manager

As one of the world's oldest and largest community foundations, the Foundation is uniquely positioned to provide donors with different investment options that provide strong investment performance. Donors may choose from the following: the Greater Milwaukee Foundation Investment Pool, managed by the Foundation Board through its Investment Committee, or one of three trust companies, JP Morgan Chase, U.S. Bank or M&I Marshall & Ilsley Trust Co.





Charitable Funds

The following are charitable funds that were created in 2008.

For a complete listing of all Foundation funds, please visit www.greatermilwaukeefoundation.org.

KPA Fund

Thomas E. and Alice M. Allen Fund

George and Margaret Barrock Fund

Basic Needs Fund

Sarah Kim Berg Fund

Bergholz Family Fund

BestD Clinic Endowment Fund

BestD Clinic Fund

Black Point Horticulture Fund

William A. and Mary Bonfield, Jr. Fund

Cedarburg Dam Perpetuity Fund

Brian J. and Catherine M. Cummings Fund

Daniel Lee Erling and Carol June Erling Fund

Cecile M. Foley Education Scholarship Fund

Brandon Gelzer Memorial Fund

Greater Menomonee Falls Foundation

William A. & Paul A. Ketterer Foundation Fund

Jerry D Maahs, Founder of Alto-Shaam, Inc., Scholarship Fund

Joseph and Laura Mantoan Family Fund

Frank J. Marek Memorial Fund

McKey Family Fund

Milwaukee Community Sailing Center Endowment Fund

Milwaukee Fund for Educational Improvement

Mitchell Park Domes Lighting Fund

Ozaukee Bank's Gift to the Future Fund

Dr. Lee A. Pavlicek Fund

Helen and Max Pollack Family Fund

Portal Industries, Inc. Fund

Possibility Playground of Ozaukee County, Inc.

William R. Puchner Fund

Quad Graphics, Inc. Disaster Relief Fund

Quad Graphics, Inc. Medical Extraordinary Fund

Roth Scholarship Fund

Sail Sheboygan, Ltd. Donor Advised Fund

Jean and Dennis Schrank Scholarship Fund

Schumann Family Funds

Frank and Elsa Sterner Family Fund

M.K. Strachota Fund

Tom and Pat Strachota Foundation Fund

Barbara A. Suran Oncology Research Fund

Tendick Family Foundation Fund (DT)

Tendick Family Foundation Fund (MT)

Trek Scholarship Fund

VanHimbergen Family Fund

Michael and Anita Ward Fund

Waukesha Strategic Alliance Fund

Verna R. Wenzel and William and Hazel Wolcott Fund

Patricia Smith Wilmeth Fund

Gilda and Robert Wren Scholarship Fund

YMCA at Pabst Farms Cap-Reserve Fund

Margaret G. Ziegler Charitable Foundation Fund

Helen and Morris Zolin Scholarship Fund

In Memoriam

This list recognizes the donors and friends who passed away in 2008. They always will be fondly remembered, as will their generosity.

Ken Adams
Hope H. Anderson
George Bockl
Mary Borgerud
Dick Burke
James P. Cattey
Arthur L. Ebert
Mildred Freese
Ralph N. Gardner
Robert "Don" Hevey
Warren "Bud" Heyse
Milton J. Huber
William F. Huffman
Dr. John H. Jackson
Mary Anne Lawlis
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Helen Momsen
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Janet Pike
Margaret M. Schmidt
Frederick J. Schroeder Jr.
William Sprinkmann Sr.
Carolyn Stanelle
Barbara A. Suran
Elizabeth L. "Betsy" Trepte
Sprague Vonier
Ruth Wallace
Eleanor N. Wilson

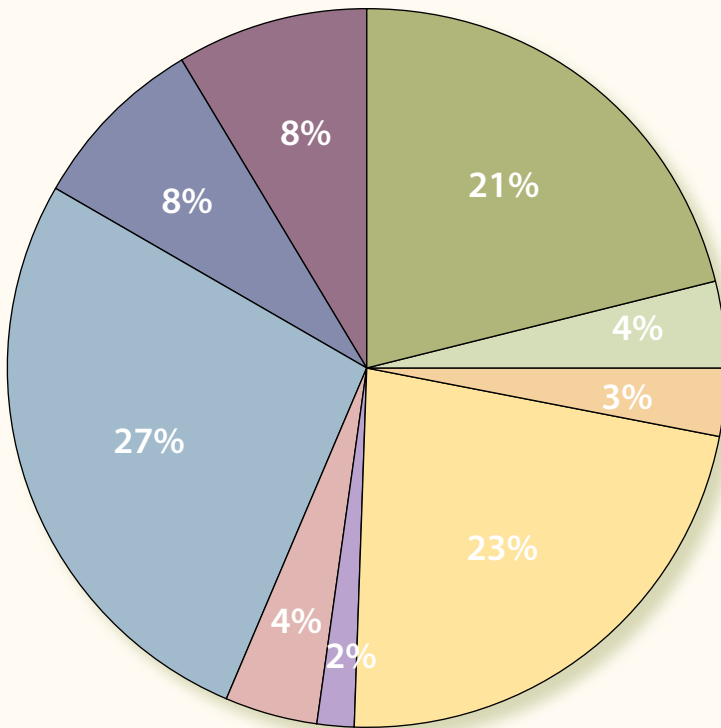
Legacy Society

This list recognizes and honors the generous individuals who have established funds during 2008 and/or included the Foundation in their estate plans.

Robert C. Archer
Mr. and Mrs. Scott Austin
James and Susan Baillon
Doug and Fran Blom
Mr. and Mrs. Chad Curran
Dr. Stephen V. DeLeers
Steven J. Donatello M.D. & Todd Dekker
Lois Ehlert
Mr. and Mrs. David A. Flowers
Mr. and Mrs. Robert Fancher
Lucinda Gordon
Mrs. Sara R. Gores
Mr. Randall L. Groth Sr.
Mr. Kristofor Hanson
Dr. Rudolph Kluiber
Ms. Marilee Glover-Kolinski and Mr. Kim Kolinski
Mr. and Mrs. Bruce Krenzke
Mr. Dennis J. Krings
Steven A. Kurzon
Mr. and Mrs. Mark Langholz
Mr. Robert Loomis
Mr. Walter Nencka
Barbara and Layton Olsen
Mr. and Mrs. Ryan Olsen
Mary Susan Prince
James and Patricia Rothenbach
Mr. Jon Scholz
Mr. Jack H. Smith
Ms. Nelle Steele
Kathleen A. Sullo
Ms. Carrie Sutherland
Mr. Donald Timm, Ph.D.
Mr. and Mrs. Tom Vogt
Tom and Elaine Zuern



2008 Grant Summary



Arts and Culture	\$6,868,120
Children/Youth/Families	\$1,241,800
Community Development	\$951,695
Education	\$7,266,135
Employment/Training	\$555,408
Environment	\$1,330,340
Health/Human services	\$8,712,598
Youth Development	\$2,596,046
Other	\$2,680,578

This is a listing of discretionary grants of \$25,000 and above. For a complete listing, and additional information about the grants, visit the news archive on our website.

Arts and Culture

Museum of Wisconsin Art	\$100,000
Milwaukee County Historical Society	\$75,000
Milwaukee Repertory Theater	\$50,000
Schauer Arts and Activities Center	\$50,000
Skylight Opera Theatre Corp.	\$30,000
University of Wisconsin-Milwaukee Foundation	\$30,000
Milwaukee County Historical Society	\$26,000
Milwaukee Chamber Orchestra	\$25,000
Milwaukee Public Theatre	\$25,000
Milwaukee Symphony Orchestra	\$25,000
United Performing Arts Fund	\$25,000
Wild Space Dance Company	\$25,000
William F. Eisner Museum of Advertising and Design	\$25,000
Woodland Pattern Book Center	\$25,000

Children/Youth/Families

COA Youth & Family Centers	\$250,000
Adoption Resources of Wisconsin	\$50,000
Family Service of Waukesha	\$44,000
The Parenting Network	\$35,000
United Methodist Children's Services of WI	\$25,000

Community Development

Sherman Park Community Association	\$60,000
Center for Neighborhood Enterprise	\$50,000
Enderis Park Neighborhood Association	\$50,000
Layton Boulevard West Neighbors	\$50,000
Metropolitan Milwaukee Fair Housing Council	\$50,000
Agape Community Center	\$45,000
Local Initiatives Support Corp.	\$40,000

Growing Power	\$35,000
Riverworks Development Corporation	\$30,000
The Community Warehouse	\$25,000
Groundwork Milwaukee	\$25,000
Havenswood Economic Development Corporation	\$25,000
Johnsons Park Neighborhood Association	\$25,000
Neighborhood Improvement Development Corporation	\$25,000

Education

Boys & Girls Clubs of Greater Milwaukee	\$250,000
Admission Possible	\$150,000
Parents Plus	\$150,000
University of Wisconsin-Milwaukee Foundation	\$150,000
Cardinal Stritch University	\$75,000
Mount Mary College	\$53,600
Friends of Schlitz Audubon Center	\$40,000
Milwaukee Achiever Literacy Services	\$30,000
Betty Brinn Children's Museum	\$25,000
University of Wisconsin-Waukesha Foundation	\$25,000
University of Wisconsin-Milwaukee Foundation	\$25,000

Employment/Training

The Student Conservation Association	\$100,000
Milwaukee Area Workforce Investment Board	\$100,000
Menomonee Valley Partners	\$75,000
Milwaukee Community Service Corps	\$70,000
Justice 2000	\$50,000
Step Industries of Milwaukee	\$30,000

Environment

Michael Fields Agricultural Institute	\$40,000
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Health/Human services

Social Development Commission	\$160,000
La Casa de Esperanza	\$100,000
Sixteenth Street Community Health Center	\$100,000
City of Milwaukee	\$75,000
Dominican Center for Women, Inc.	\$60,000
Badger Association of the Blind and Visually Impaired	\$50,000

City of Milwaukee Health Department	\$50,000
New Hope Project	\$50,000
Our Space, Inc.	\$40,000
The Cathedral Center	\$35,000
Council for the Spanish Speaking	\$35,000
Word of Hope Ministries	\$35,000
Disability Rights Wisconsin	\$30,000
Hebron House of Hospitality	\$30,000
Alzheimer's Disease and Related Disorders Association	\$25,000

ARCh Association for the Rights of Citizens with Handicaps	\$25,000
Center for Blind & Visually Impaired Children	\$25,000
Community Advocates	\$50,000
CORE/El Centro	\$25,000
Grand Avenue Club	\$25,000
Eisenhower Center	\$25,000
InHealth WI	\$25,000
Meta House, Inc.	\$25,000

Youth Development

Safe and Sound	\$100,000
Junior Achievement of Wisconsin Inc.	\$50,000
Pearls for Teen Girls, Inc.	\$35,000
Jewish Youth Foundation	\$35,000
Family House Inc.	\$30,000
Running Rebels Community Organization	\$25,000
Boys & Girls Club of West Bend	\$25,000
Diverse and Resilient	\$25,000

Other

Justice 2000	\$100,000
Women's Leadership Fund	\$25,000
Nonprofit Center of Milwaukee Inc.	\$25,000



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Marshay Montriell
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Herbert J. Mueller Society

The Herbert J. Mueller Society recognizes the efforts of professional advisers who have worked with the Greater Milwaukee Foundation on behalf of clients who have an interest in creating charitable legacies. The Society is named in memory of Mueller, an estate planning attorney who, through his quiet efforts, helped shape the Foundation into the organization it is today. Mueller worked with his clients to create more than a dozen Foundation funds with gifts totaling nearly \$50 million by the time he passed away in 2001 at age 91.

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Kathy Schrader, senior gift planning adviser
Barb Tibbals, development and donor services associate

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Rafael Acevedo, senior donor services officer
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Stacie Makkos, accounting assistant

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Patricia Cole, receptionist
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Fran Kowalkiewicz, grants manager
Tracy Maclin, senior program officer
Dionne Shaw, senior program officer
Carol Wilson, scholarship and program coordinator

Wisconsin AIDS Fund

Tamara Martinsek, director



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Cover	Students from Hawley Environmental School, Milwaukee, WI
P. 1	Students from Hawley Environmental School, Milwaukee, WI
P. 2	Community Advocates client, Conswalla Williams, and her case manager, Maudwella Kirkendoll
P. 4	Knock Out® rose creator and Foundation donor, Bill Radler (Photo: Syl Arena)
P. 6	United House resident, Steve Fulton
P. 8	2nd grade classroom, Hawley Environmental School, Milwaukee WI
P. 10	Fifth grade students at Nativity Jesuit Middle School and their principal, Melodie Hessling
P. 12	Actor Jannie James in the Milwaukee Repertory Theatre production of "Fire on the Bayou: A Mardi Gras Musical Extravaganza." (Photo: Jay Westhauser)
P. 14	Foundation Board members
P. 16	Mike Miller, managing director of Colonial Consulting Corp. and the Foundation's investment consultant
P. 19	2008 winners of the William C. Frye and Frank Kirkpatrick awards (Photo of Jeannetta Simpson-Robinson by John Kimpel, Photo of Steven J. Smith courtesy of Journal Communications)
P. 20	Jennifer Morris, a Urban Education Fellows Program alumna and dean of students at St. Rose and St. Leo's Catholic Urban Academies and Jeff Monday, principal of Messmer Catholic Schools
P. 21	Glen Allen, a New Leaders for New Schools participant and assistant principal at Francis Starms Discovery Learning Center in Milwaukee
P. 22	A view from Mequon Nature Preserve (Photo: Rob Nuernberg)
P. 23	Mary Henszey, along with her husband, are one of the founders of the Oconomowoc Area Foundation.
P. 24	United House resident, Laverna Gates
P. 25	The reemergence of wildflowers such as these is a symbol of success of the Mequon Nature Preserve (Photo: Rob Nuernberg)
P. 27	A student from Hayes Bilingual Elementary School in front of the boat launch at Inland Seas School of Expeditionary Learning. Both schools partner with the Sixteenth Street Community Health Center to learn about the Kinnickinnic River.
P. 29	Student from Hawley Environmental School
P. 31	Street signage outside of the Foundation's Milwaukee office (Photo: Paula Perez)

Annual report design: Paula Perez
Writers: Becca Mader and Denise Callaway

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