

CREATING THE FRAMEWORK FOR OUR FUTURE



Greater Milwaukee Foundation

2010 Annual Report

2010 Annual Report



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All photos taken by Jim Moy, except when noted



## OUR MISSION

### Strengthening Communities Through Effective Partnerships

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## OUR VISION

The Greater Milwaukee Foundation strives to be an effective partner that develops, supports and advocates for projects, programs and policy changes that strengthen communities in measurable and sustainable ways.

We will partner with others to help our donors grow their philanthropy in support of the organizations and causes important to them, address critical community needs as an active grantmaker and convener and advocate for change to better serve people and their communities.

## BOARD OF DIRECTORS

The Foundation's volunteer Board includes some of Milwaukee's leading civic and community leaders who all believe in the power of philanthropy as a way to strengthen the community.

- John W. Daniels Jr., chair
- Thomas L. Spero, vice chair
- Wendy Reed Bosworth
- Peter W. Bruce
- Ness Flores
- Hon. Janine P. Geske (Ret.)
- Franklyn M. Gimbel
- Jacqueline Herd-Barber
- Judy Jorgensen
- David J. Kundert
- David J. Lubar
- Mary B. Read

## MESSAGE FROM THE BOARD CHAIR **John W. Daniels Jr.**

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The Greater Milwaukee Foundation has long been an influential community partner through our grantmaking and collaboration with donors, as well as our ability to convene a wide range of community stakeholders. Within the past year, under the direction of our new president and CEO, Ellen M. Gilligan, we have continued that important work while also building the framework for the future growth of our community and our Foundation.

Ellen brings a strong background as a collaborative leader who makes things happen. Since her arrival, she has steadily been pulling together the people and the plans to best prepare the Foundation to tackle the toughest issues that have kept our community from reaching its full potential. Our Board, the thousands of people who have invested in our Foundation as donors, our grant recipients, and our community stakeholders have all been – and will continue to be – powerful partners in this process.

From a financial perspective, the Foundation is well positioned to meet our future goals and commitments, thanks to the generosity of our donors and our very strong investment performance.

Of course the Foundation has always led the way in addressing the most pressing needs of our community. No issue is more important now than the need to transform the educational opportunities which are essential to sustaining the vibrancy of our community. The Foundation, in collaboration with several other leading entities, has and will continue to work on these issues, and we expect you will hear much more about this in the upcoming year.

Our Foundation will continue to play a pivotal leadership role as a community catalyst for change in addressing issues that shape the future of the greater Milwaukee area. I thank all of you who have joined with us to build a better community.

A handwritten signature in black ink that reads "John W. Daniels Jr." The signature is written in a cursive, flowing style.

John W. Daniels Jr., board chair

## MESSAGE FROM THE PRESIDENT **Ellen M. Gilligan**

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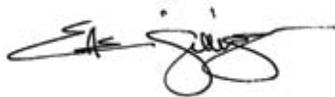
I am very glad to be in Milwaukee! Everyone I have met has made me feel welcomed and at home, and I am incredibly grateful to this dynamic community of caring and committed citizens.

It is an honor to lead the Greater Milwaukee Foundation.

My gratitude and recognition goes out to all our donors who are always the cornerstone of our shared success. Community foundations serve as the most effective means to help donors fulfill their specific philanthropic goals, make the most of their giving, and contribute to a stronger and more vital community. I thank our donors for their trust and confidence over the Foundation's 96-year history. We remain committed to helping all our donors effectively manage their resources to best meet their charitable goals.

Community foundations also play a unique role in addressing the toughest issues facing our community. My experience has taught me that community foundations are especially well positioned for experimentation and innovation – and they have the patience to take on the long-term issues. We must take advantage of our special community position to convene key stakeholders, build true public-private partnerships, and to advance clarity and take action on critical issues.

There are great opportunities ahead for all of us. I look forward to a productive and enjoyable partnership with you to significantly improve the lives and prospects of people throughout our community.



Ellen M. Gilligan, president and CEO



# YEAR IN REVIEW    \$25.2 million in gifts    \$27.2 million

For only the third time in its history, the Greater Milwaukee Foundation welcomed a new leader as **Doug Jansson retired as president and CEO**. Under Jansson's leadership, the Foundation experienced a period of incredible growth. When he joined in 1993, the Foundation allocated \$7.6 million in grants and had \$114 million in assets. In 2010, it had awarded \$27.2 million in grants to organizations in the four-county service area and beyond and assets reached nearly \$564 million.

The Board created the **Doug Jansson Emerging Leadership Award** as a way of paying tribute to Jansson's 17 years of service. The honor, one of three civic awards the Foundation gives at its annual meeting, recognizes his commitment to developing new nonprofit leaders, particularly among those in underserved communities.

**Ellen M. Gilligan**, former vice president of community investment for the Greater Cincinnati Foundation, joined the Foundation in September. She spent nearly 30 years in the nonprofit sector with experience at the United Way of Greater Cincinnati, United Way of America and the Local Initiatives Support Corporation. Her experience includes building coalitions and partnerships to address critical needs and issues including education, community development, race relations and safety net services.

**John W. Daniels Jr.**, chairman of Quarles and Brady LLP in Milwaukee, succeeded Judy Jorgensen as Board chair in July. The Board also welcomed Jacqueline Herd-Barber, a former engineer at Motorola and community volunteer. She succeeded Joan M. Prince, who served on the Board since 2002 and completed her term in June.



Doug Jansson



Ellen M. Gilligan



Milwaukee Rescue Mission

# in grants \$564 million in assets 55 new funds

Continued demand from Milwaukee-area residents for assistance from food pantries and homeless shelters led the Foundation's Board to commit an additional \$100,000 in December for a total of \$400,000 for its **Basic Needs Fund**. The new infusion of money was the largest amount added to the fund since it was created in 2008 to help area agencies address emergency food and shelter needs. By the end of 2010, the fund had allocated \$975,100 in grants to 24 organizations in the metro area.

After nearly 15 years at the Foundation, the **Youth in Service Fund** spun off as its own nonprofit called Lead2Change. The fund was created to give individuals up to age 18 a head start in philanthropy by engaging them in the development of community service projects and in grantmaking. **Lead2Change** will include grantmaking, a biannual youth leadership conference and a financial empowerment program.

The **Community Partnerships** department focused mainly on education issues by sponsoring research, offering a series of convenings and hosting an event to welcome Gregory Thornton, the new Milwaukee Public Schools superintendent. The department also explored expansion of regional transit and collaborated with the state on finding ways to improve access to benefits.

"**Mary Nohl: Inside & Outside**," a biography written about local artist and Foundation donor Mary L. Nohl, received awards for both writing and design. The book, published by the University of Wisconsin Press and containing reproductions of Nohl's artwork, went into a second printing. It was written by Barbara Manger and designed by Janine Smith.

*Creating the framework for our future*



Students at Hawley Environmental School

Mary L. Nohl yard | Photo courtesy of Eric Oxendorf

donor profile

JOE L. AND ANNIE B. KENNEDY



## Couple left the classroom, but not the fight for quality education

Over the course of their 30-plus years working in the Milwaukee Public School district, Joe and Annie Kennedy have been witness to – and participants in – the evolution of local education.

Both started as substitute teachers in 1962. Annie taught science and reading in middle and high school before becoming an elementary school reading teacher. Joe taught at the former Roosevelt Junior High School before heading up Riverside High School, Lincoln Junior High School and helping start the Milwaukee High School of the Arts.

One thing that hasn't changed, however, is their reason for entering education in the first place – the kids. While disheartened by struggles that MPS and its students now face, the retired couple decided that as lifelong educators, they needed to be involved somehow in a solution.

"We need to do something to help children," Annie said. "They are at a desperate point now."



They are channeling their passion and philanthropy through the Joe L. and Annie B. Kennedy Scholarship Fund, an Acorn fund they created in 2002. Initially, the fund was designed to provide scholarships for students attending New Testament Christian Academy, a private school on Milwaukee's northwest side that the couple helped start. Joe served as its principal for nine years and Annie taught reading and first and second grades. They drafted selection criteria and solicited family and friends to help grow the fund.

When the school became part of Milwaukee's school choice program, however, students who previously

needed financial assistance were covered. The Kennedys decided to change their fund's purpose, making it more flexible in whom and how it helps.

"We felt we should have it as an open-ended advisory fund to assist students wherever they might be," Joe said.

Their fund is not quite a decade old, but the couple's relationship with the Foundation stretches back more than 30 years. Joe, a close friend of Hank Aaron, advises the former home run king's Chasing the Dream Fund that was created at the Foundation in 1976.

The Foundation's reputation and longevity gave the Kennedys confidence that their fund's mission would be sustainable. While their fund has yet to reach grantmaking size, the couple hopes that when it does, it can provide opportunities for Milwaukee students to succeed.

"You can't change the whole dynamic so you just have to help where you can," Joe said.

*"We need to do something to help children. They are at a desperate point now."*

Annie B. Kennedy

donor profile

## MARY BARROCK BONFIELD



Students at Marquette University's Ray and Kay Eckstein Hall, new home of its law school.

## Foundation funds a testament to donor's love for family

Like her contemporaries, Audrey Hepburn and Jackie Kennedy, Mary Barrock Bonfield had regal charm, without the crown.

Family members describe her as classy and captivating. Whether working as the office manager at her father's downtown law practice or later teaching at the Milwaukee High School of the Arts, she was often the center of attention.

Her focus, however, was on her family and her husband and she did not hesitate to show devotion to either. She lived in the same condo building as her mother for many years and doted on her niece and nephews. After the death of her father and her husband, she kept their Cadillacs and faithfully had them restored. She lovingly held on to family furniture and other belongings.

Certain things she kept private, however, namely her finances and her final wish of honoring loved ones. In fact, her brother, Robert, and his son, Christian, did not learn about



Mary Barrock Bonfield  
Photo courtesy of Barrock family.

her relationship with the Greater Milwaukee Foundation until after her death from cancer in 2007.

With her will, as well as with other passions or pursuits, "she put a lot of thought and effort and heart and soul into everything she did," Christian said. "She had everything planned out and boy, did she have a plan."

Rather than creating one designated fund supporting various charities or a broad field of interest fund, Barrock Bonfield specified four unique funds. Two funds named after her and her late husband, William A. Bonfield Jr., celebrate areas important to them,

namely, their passion for the arts and their alma maters – Ohio University's College of Business and Divine Savior Holy Angels High School. Two funds named after her parents, George and Margaret Barrock, provide scholarships to students at Mount Mary College and her father's alma mater, Marquette University Law School, among other interests. An annual law school lecture also honors the couple.

"Mary wanted them remembered no matter what," her brother said.

Given his aunt's attention to detail and the Foundation's dedication to carrying out her wishes, Christian Barrock has had very few decisions to make regarding her funds. But that does not diminish the pride such involvement brings the family.

"It's nice to know there are groups out there that can help manage those wishes," Christian said. "Knowing that our family is contributing in some meaningful way on a regular basis is very humbling."

*"Knowing that our family is contributing in some meaningful way on a regular basis is very humbling."*

Christian Barrock  
Mary Barrock Bonfield's nephew

donor profile

# WAYNE ROPER



## Local attorney makes investment in central city education

Recently it seems there hasn't been much to cheer about regarding education in Milwaukee. But Wayne Roper, 87, believes things have to improve and he is doing his part to make that happen.

Roper is doing so not as a teacher nor as a policymaker but as a private citizen who feels passionately about providing low-income students in particular with the chance to get a head start on a successful future.

He is making an investment in education through the Roper Family Educational Fund, a donor advised fund he created in 2006 at the Greater Milwaukee Foundation to support choice and charter schools.

"I hope to make more educational opportunities in the inner city where they are direly needed," said Roper, senior counsel at Milwaukee's von Briesen & Roper S.C.

Education has long been a passion for Roper, a graduate of the University of Wisconsin-Madison and Harvard Law School. In addition to serving on boards of several businesses and foundations



including Northwestern Mutual and the Wisconsin Alumni Research Foundation, he also was a board member of the Lynde and Harry Bradley Foundation when the Milwaukee Parental Choice Program began in the 1990s. The foundation was an early supporter of what became the country's first publicly-funded voucher program and has poured millions into scholarships that enable low-income Milwaukee students to attend the private school of their choice.

"School choice was wonderful and it worked," said Roper, whose late wife, Jean, shared his passion. "Hopefully it has better educated kids from the inner city and some who would otherwise not finish high school or go on to college."

When it came time to creating a fund, Roper knew where he wanted his money to go. Though he considered starting a private foundation, the more he thought about it, the less he liked the idea because of the paperwork and cost involved.

Roper, who specialized in estate planning, knew a thing or two about drafting gift agreements and decided to write his own. He plans to build his fund through his estate by contributing his IRA. His son and daughter will serve as successor grant advisers.

Roper relies heavily on Dan McKinley, executive director of PAVE, for information on schools he supports. PAVE started as a scholarship program for choice and charter students and now helps develop the capacity of the schools themselves.

"I admire people who have a vision like Wayne of improving the lives of these families that live in poverty," he said. "His impact is much broader than a one-to-one relationship with a school because it could have an impact over time as this fund grows."

*"His impact is much broader than a one-to-one relationship with a school because it could have an impact over time as this fund grows."*

Dan McKinley, PAVE executive director

## NEW FUNDS

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More than 1,000 individuals, families and organizations have turned to the Greater Milwaukee Foundation over the years to help them make a difference in their community and create their own personal legacy of giving. In 2010, 55 individuals and organizations chose us as their partner in philanthropy.

For a complete listing of all Foundation funds, please visit [www.greatermilwaukeefoundation.org](http://www.greatermilwaukeefoundation.org).

Daniel J. Adam Memorial Fund	Jackie Mussfeldt Fund
America's Freedom Center Foundation's Veterans Manor Assistance Fund	Jackie Mussfeldt Scholarship Fund
Herd-Barber Family Fund	MVB Fund
Bipolar Disorder Research Fund	NAMI Waukesha Endowment Fund
Eleanor G. Buetschli Fund	Anita Ella Oliver Memorial Fund
Richard A. and Esther L. Dawe Fund	Philip William Orth and Mariette C. Orth Charitable Fund
Sally J. Day Fund	Pilgrim United Church of Christ Endowment Fund
Carrie Ehlers Memorial Scholarship Fund	Judi and George Prescott Fund
Friends of Lapham Peak Endowment Fund	Austin and Heather Ramirez Foundation Fund
Fund for Lake Michigan	Schiefelbein Foundation Fund
Walter W. Glaeser Fund	Paul and Jan Schueller Family Fund
William and Deanna Goeldner Memorial Fund	Sivak Family Foundation
Caleb Gottinger Memorial Fund	Snyder Insurance Family Fund
G/Z Family Fund	Spina Bifida Association of Wisconsin Endowment Fund
High Tides Fund	Edwin P. Sprengler Fund
Patricia Ray Howell Fund	St. Joseph Foundation Fund
JA Foundation Fund	Ivan P. Steingart Fund
Richard Murray Kimball and Sarah Wright Kimball Fund	Chris and Kathy Thorsen Family Foundation Fund
Mary Helen Koehler Memorial Fund	Donald P. Timm Fund
Donald A. Markwalder, Jr. Fund	Trees for Tomorrow Endowment Fund
Richard H. May Fund	Harold J. and Frances H. Vincent Honors Scholarship Fund
Brian A. and April L. McCarty Fund	Bernard J. and Marie E. Weiss Fund
Mary Anne McNulty Umbrella Hat Fund	Bill & Gwen Werner Fund
Milwaukee Children's Village Fund	Wisconsin Rural Water Foundation Fund
Milwaukee Partnership for Education Fund	Carol A. Wozniak Memorial Fund
Milwaukee Regional Research Forum Fund	Clifford J. and Victoria M. Zahn Fund
	Mary Jane Ziska Memorial Fund

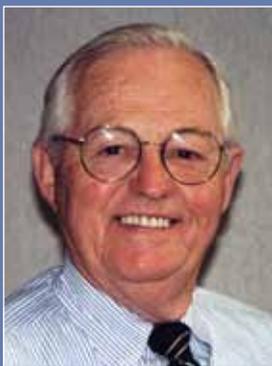
## IN MEMORIAM

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Eleanor G. Buetschli  
Catherine B. Cleary  
Sylvia M. Dambruch  
Gertrude Davidson  
Esther L. Dawe  
Walter S. Dryburgh Jr.  
Carl W. Edquist  
Ethel Gill  
Walter W. Glaeser  
Payson R. Gould  
Bridger Stowe Grebe

Lloyd W. Herrold  
Jeanne Roxanne Houseman  
Shirley Jeffrey  
Sandra Koch  
Pauline Kopmeier  
Greg C. Loyda  
Paul F. Meissner  
Myrna Minahan  
Ellen Morris-Gutierrez  
Walter Olsen  
Mariette C. Orth

Audrey K. Pabst  
Francis J. Rechten  
Brenton H. Ruppel  
A.F. (Red) Schmalzer  
Richard A. Schmidt  
Donald Timm  
James A. Urdan  
Harriette V. Vick  
Bernard J. Weiss  
Donald V. Wiberg  
Victoria M. Zahn



**Brent Ruppel**, who was the former chairman, president and CEO of Robert W. Baird and who died in October at 86, was an incredible friend and supporter of the Foundation. He served the Foundation in various capacities including as a Board member for 10 years and as a member of our Investment Committee for 24 years. We appreciate his commitment and dedication and we're grateful for his help in furthering our mission.

grantee profile

## PENFIELD CHILDREN'S CENTER



Emmanuel Johnson has a better relationship with his siblings thanks to Penfield therapist Joanna Love.

## Early intervention factors into future success

It is fairly normal for little boys to act out from time to time. But for 3-year-old Emmanuel Johnson, his temper tantrums were becoming so commonplace that his mom, Michelle Allen, was giving him timeouts up to seven times a day.

He would bite himself when he got upset and would often bite or hit his sisters. Dealing with her son's behavior became so overwhelming and time consuming she felt like she did not pay enough attention to her daughters, Jacshelle, 7, and Namazzia, 1.

"I've never seen a child with so much anger and frustration," Allen said. "It was very hard for me as a mother to see my child behave this way."

In less than three months time, her son has undergone a transformation, thanks to the efforts of Penfield Children's Center. Its Behavior Clinic, run in partnership with Marquette University, provides parents like Allen a way to manage their child's tantrums, hyperactivity and other behaviors.

"People think it is something that

they will grow out of," said Robert Fox, Ph.D., the clinic's director. "Unfortunately, that is not the case."

The clinic focuses on children ages one to five, with the idea that early intervention is the key to preventing such behaviors from affecting children later in life. Ninety-two percent of children referred are diagnosed with a behavioral problem. Staff visits families at home to study the child's behavior and witness parents' interaction with their children. They create a plan tailored to the needs of each child and return weekly for up to 12 sessions, depending on the severity. A follow-up visit a month later gives staff a chance to see if the suggested strategies are working.

For Emmanuel, who has a speech delay, his inability to express himself led to his frustration and his tendency to lash out. With the help of therapist Joanna Love, Allen focused on improving his language skills, redirecting his anger and rewarding good behavior. He listens better, plays more cooperatively and is less aggressive toward others.

Sometimes parents just need to take a different approach, Love said. She and other staff work to build parents' confidence and parenting skills. With such guidance, 59 percent of kids leave the program without the original diagnosis and their families, in turn, are better able to cope.

Given the clinic's success, more people have turned to it for help. In 2010, more than 300 children were referred and more than 30 agencies and individuals, including pediatricians, social workers and parents, rely on the clinic. It now has a waiting list of up to 75 families. A \$25,000 grant from the Greater Milwaukee Foundation in 2010 enabled it to hire a bilingual paraprofessional to serve the clinic's increasing caseload of Spanish-speaking families.

For a variety of reasons, 42 percent of parents do not complete the treatment sessions. But for those who do, like Allen, the results are worth it.

"I still take it one day at a time, but he's come a long way," she said. "It really has worked."

grantee profile

PARTNERS ADVANCING VALUES IN EDUCATION



PAVE's investment in Wisconsin Lutheran High School enables principal Ned Goede to strengthen its programming.

## Building upon bold visions

Ned Goede, like many educators, believes college is the gateway to success. It's his job as principal of Wisconsin Lutheran High School to best prepare students on how to get there.

Doing so is not always easy, though. Some incoming freshmen don't know their times tables. Others are academically four to five grade levels behind. But Goede and his staff have an ambitious plan to overcome those deficits.

"We are a school that doesn't just talk about things, but we do the things we talk about," Goede said.

For the past four years, the school, which participates in Milwaukee's Parental Choice Program, has hosted a four-week intensive summer academy for incoming freshmen in need of academic help. This year it will introduce the College Readiness Continuum, a year-round program that takes freshmen behind in English and math and brings them up to par with their peers by sophomore year. Both programs were made possible through encouragement

and investment from PAVE's Partner School Program.

"We invest in leaders that have a bold vision for Milwaukee's kids," said Dan McKinley, PAVE's executive director. "We are helping (schools) gain that extra capacity they couldn't gain by themselves."

A \$25,000 grant from the Greater Milwaukee Foundation in 2010 helped increase PAVE's capacity so it could in turn increase the capacity of schools like Wisconsin Lutheran. Originally a scholarship program for low-income Milwaukee families to send their children to private schools, PAVE has long since revamped its mission to provide resources to strengthen the schools themselves. Two years ago it created its Partner School Program to work with choice and charter schools to strengthen governance and leadership, financial accountability, academic performance and partnerships with families and community.

Each school arrives with different goals and a different set of strengths and weaknesses, which are discovered

through an assessment. PAVE's role, which McKinley likens to that of a personal trainer, is to provide the support and motivation needed to reach their objective.

Some schools require more help than others. Wisconsin Lutheran has received financial assistance to boost its academic programming. Other schools, like St. Marcus Lutheran, have relied on PAVE for loans and grants to help physically expand. Among American Peace Academy has received help ranging from board recruitment to strategic planning to negotiating a lease for a new building.

While the nonprofit exists to bring schools to the next level, McKinley admits that PAVE cannot do it alone.

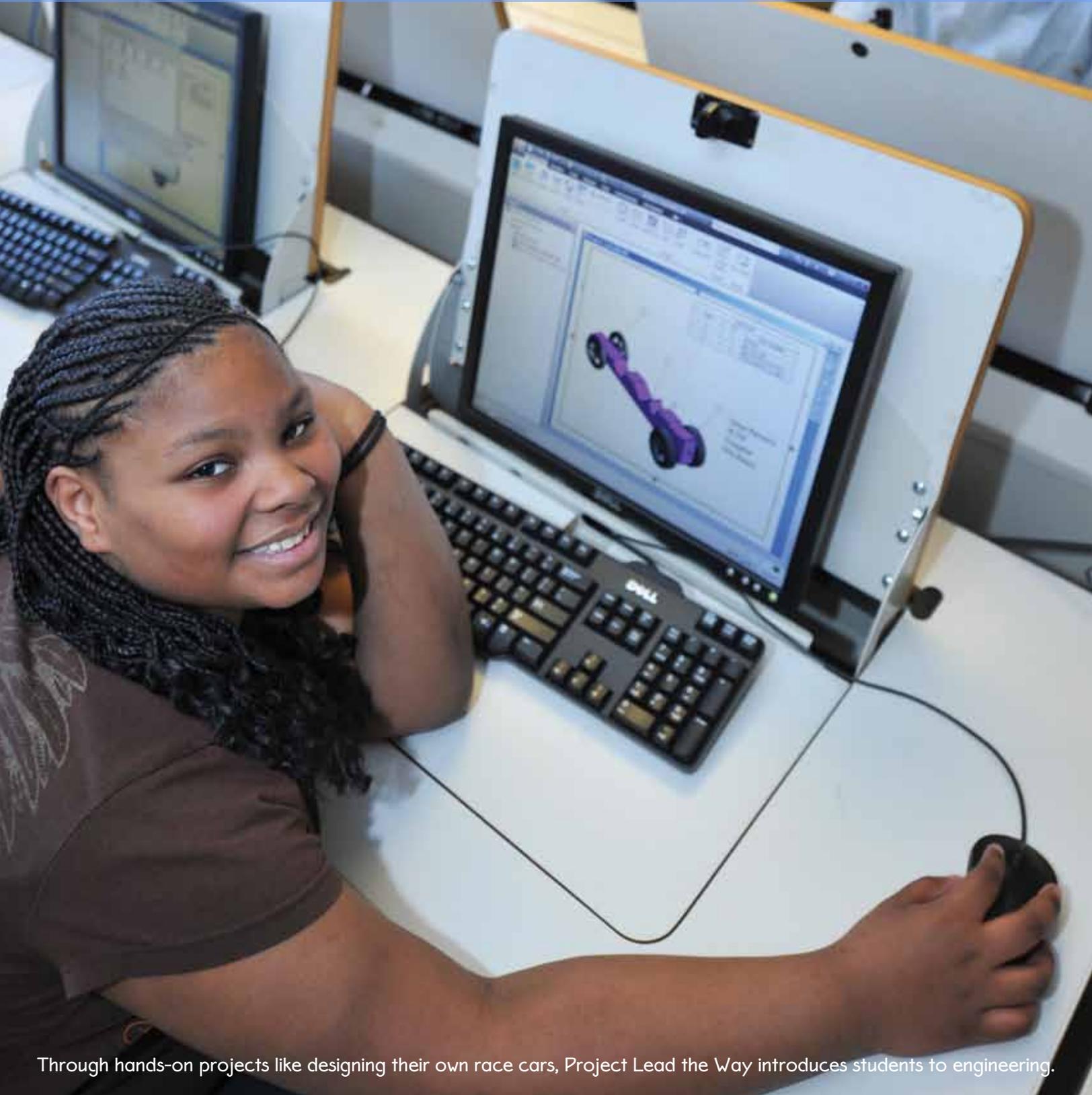
"The effect that any one organization can have is very limited and you need more than just the intention and the plan and the wish," McKinley said. "But together there is a lot of strength."

*"We invest in leaders that have a bold vision for Milwaukee's kids."*

Dan McKinley, PAVE executive director

grantee profile

## PROJECT LEAD THE WAY



Through hands-on projects like designing their own race cars, Project Lead the Way introduces students to engineering.

## Engineering a new way to look at math and science

At Dr. Benjamin Carson Academy of Science, a Milwaukee Public School on the city's northwest side, a focus on science, math and technology is ever present. From its name down to Project Lead the Way, a pre-engineering program it has offered for three years, the K-8 school is committed to those core areas.

So this year, when funding dried up for the PLTW teacher and the program's future was in jeopardy, PLTW coach Jue Lunsford believed it wasn't a matter of if it would survive, it was a matter of how.

With a passion for the program and a proclivity for making things work – she is an engineer, after all – Lunsford pored over the school's schedule, conferred with other staff and found a solution by integrating the program into the science curriculum.

"It is the passion of the kids that make me go, 'Look – I'm not giving up on

this one,'" said Lunsford, who has been instrumental in helping schools implement, maintain and grow the hands-on, project-based program.

Lunsford visits an average of four to five schools daily to set up equipment, coach teachers, mentor students or provide other support. A \$60,000 Greater Milwaukee Foundation grant helped fund Lunsford's salary.

At a time when tight budgets are forcing many districts to scale back programming, MPJ has expanded PLTW to 27 schools and 5,100 students, recognizing that it not only helps strengthen students' background in math and science, but also helps them develop key problem-solving and other skills. The program, now in its seventh year at MPJ, has the largest concentration of schools and students compared to other districts nationwide. With 46 percent females and 87 percent students of color, MPJ also has the most diverse population.

PLTW was originally designed to increase students' interest in science, math and technology, but studies indicate it boosts attendance rates as well as increases math and reading test scores. The more time spent in the program, the greater interest and benefits a student sees, according to a recent longitudinal study in select MPJ schools conducted by the University of Wisconsin-Milwaukee and partially funded through a \$20,000 Foundation grant.

"If math and science is keeping kids in school, that in and of itself is a win to us," said Lauren Baker, MPJ's coordinator of career and technical education.

Lunsford sees the program's ultimate goal as helping remove the fear and intimidation that students associate with math and science.

"I see it as an integral part of the community's development of career pathways for our students," she said.

*"I see it as an integral part of the community's development of career pathways for our students."*

Jue Lunsford  
Project Lead the Way coach

grantee profile

# ADMISSION POSSIBLE



Admission Possible coach, Zach Montez, and his student, Barwako Osman

## Navigating the pathway to college and beyond

Growing up in Africa, Barwako Osman and her family knew a better life existed beyond their homeland of Somalia, which had been ravaged by a decades-long civil war, and the confines of the Kenyan refugee camp where they had since relocated.

College, the teen later learned, was the ticket to that better life.

“If I don’t have an education, I’ll never make my goals come true,” said Osman, a South Division High School junior.

Yet as neither of her parents had ever attended college, she didn’t know how to bridge the gap between where she was and where she wanted to be.

Admission Possible does and is making sure Osman gets there. The nonprofit helps low-income juniors and seniors with admissions tests, college applications, scholarships and financial aid. It began in 2000

in the Twin Cities and launched a second site in 2008 in Milwaukee, thanks to a \$150,000 grant from the Greater Milwaukee Foundation. Admission Possible now serves 245 students in seven Milwaukee high schools.

Overcoming a lack of confidence can be as challenging for students as completing the ACT, said Kate Lundeen, executive director of Milwaukee’s site. Program coaches, who are AmeriCorps members and spend 320 hours after school with students, serve as cheerleaders and counselors to help overcome barriers, access resources and stay on track. Once in college, coaches help students access campus resources, renew financial aid and answer any questions.

“The coach is the magic variable,” Lundeen said. “They just aren’t going to let anything slip through the cracks.”

Zach Montez fills that role for Osman and 28 other juniors. Likened to a brother as well as a mentor, Montez is there whenever she needs him.

Getting into college is half the battle for students like Osman. Picking the right school and staying there are as important. The program sets up college visits and helps students complete multiple college applications so they increase their chances of success. Osman, who wants to become a pediatrician, has already identified Cardinal Stritch University, Alverno College and Mount Mary College as top choices.

Filling the gap between those who earn their degree and those who do not won’t happen overnight, but Admission Possible is making inroads. Last year, 95 percent of its Milwaukee students were admitted to college.

*“If I don’t have an education, I’ll never make my goals come true.”*

Barwako Osman,  
South Division High School junior

# GRANTMAKING HIGHLIGHTS

The list below reflects grants awarded through the Foundation's discretionary grant process and includes unrestricted and broad field of interest funds only. Visit the grantee section of our website for the full list of our discretionary grants.

## \$100,000 and up

CORE/EI Centro  
La Casa de Esperanza, Inc.  
Metropolitan Milwaukee Association of Commerce (for Schools that Can program)  
Mount Mary College  
Planning Council for Health & Human Services, Inc.  
Social Development Commission  
The Student Conservation Association  
Waukesha Memorial Hospital Foundation

## \$50,000 - 99,999

AIDS Resource Center of Wisconsin, Inc.  
Betty Brinn Children's Museum  
City of Milwaukee  
Grand Avenue Club, Inc.  
HeartLove Place  
Housing Resources Inc.  
Layton Boulevard West Neighbors, Inc.  
Literacy Services of Wisconsin  
Marquette University  
New Leaders for New Schools  
Next Act Theatre, Inc.  
Our Next Generation, Inc.  
Sherman Park Community Association  
Silver Spring Neighborhood Center  
Skyline Opera Theatre  
Ten Chimneys Foundation  
The Cathedral Center  
The Dr. Howard L. Fuller Education Foundation  
United Community Center  
Waukesha County Community Dental Clinic, Inc.  
Wisconsin Community Services, Inc.  
Wisconsin Museum of Quilts & Fiber Arts, Inc.

## \$25,000 - 49,999

Agape Community Center  
Albright Methodist Church  
Alma Center Inc.

Alverno College  
Bread of Healing Clinic, Inc.  
Cardinal Stritch University  
Center for Resilient Cities  
City of Milwaukee  
CORE/EI Centro  
Disability Rights Wisconsin  
Donors Forum of Wisconsin  
Enderis Park Neighborhood  
Express Yourself Milwaukee  
Greater Milwaukee Committee  
Havenswood Economic Development Corporation  
Hebron House of Hospitality  
IndependenceFirst  
Local Initiatives Support Corporation  
Make a Difference - Wisconsin, Inc.  
Medical College of Wisconsin  
Meta House, Inc.  
Milwaukee Artist Resource Network Inc.  
Milwaukee County Historical Society  
Milwaukee Environmental Consortium  
Milwaukee Outreach Center  
Milwaukee Repertory Theater  
Mount Mary College  
Neighborhood Improvement Development Corp.  
Our Next Generation, Inc.  
Our Space, Inc.  
Parenting Network of Greater Milwaukee  
Partners Advancing Values in Education, Inc.  
Pearls for Teen Girls, Inc.  
Penfield Children's Center  
Renaissance Theaterworks, Inc.  
Riverworks Development Corporation  
St. Ann Center for Intergenerational Care  
The Benedict Center  
TRUE/kool, Inc.  
United Migrant Opportunity Services  
University of Wisconsin Extension - Waukesha County  
University of Wisconsin - Milwaukee Foundation  
University of Wisconsin - Waukesha Foundation

**In 2010  
3,868 grants  
were made.**

**53 percent of overall grants made  
were in the fields of education and  
health and human services.**

Urban Anthropology  
Urban Underground, Inc.  
Walker's Point Center for the Arts  
Wildspace Inc.  
Wisconsin Conservatory of Music  
Wisconsin Early Childhood Association-Madison  
Wisconsin Women's Business Initiative Corporation  
Woodland Pattern Book Center  
YWCA of Greater Milwaukee

### **\$10,000 - 24,999**

Advocates of Ozaukee Inc.  
African American Children's Theatre  
ArtWorks for Milwaukee  
Balance, Inc.  
Boys & Girls Club of West Bend  
Cream City Foundation  
Dane Co. TimeBank  
Diverse and Resilient, Inc.  
Donors Forum of Wisconsin  
Engineers & Scientists of Milwaukee, Inc.  
Equality Wisconsin Fund Inc.  
Figureheads, Inc.  
Food Pantry of Waukesha County, Inc.  
Frank Lloyd Wright Wisconsin Heritage Tourism Program  
Hispanic Professionals of Greater Milwaukee  
Historic King Drive Business Improvement District  
Jewish Family Services  
Johnsons Park Neighborhood Association  
Ko-Thi Dance Company  
Latino Community Center, Inc.  
Layton Boulevard West Neighbors, Inc.  
Marquette University  
Milwaukee Achiever Literacy Services  
Milwaukee Center for Independence  
Milwaukee Chamber Theatre  
Milwaukee Children's Choir  
Milwaukee County Historical Society  
MPTV Friends

NAMI Waukesha, Inc.  
Optical Society of America, Inc.  
Project Return  
Public Policy Forum  
Radio for Milwaukee, Inc.  
Serenity Inns, Inc.  
Sharp Literacy, Inc.  
Spotted Eagle Inc.  
St. Charles Youth & Family Services  
State Voices  
Women's Fund of Greater Milwaukee, Inc.

### **\$1 - 9,999**

Advocates of Ozaukee Inc.  
Alverno College  
Alzheimer's Disease and Related Disorders Association, Inc. Milwaukee  
America's Promise - The Alliance for Youth  
Community Coordinated Child Care (4C)  
Delta Memorial Endowment Fund  
Donors Forum of Wisconsin  
Illinois Facilities Fund  
IMPACT Alcohol & Other Drug Abuse Services, Inc.  
Interfaith Caregivers of Ozaukee County  
Kathy's House, Inc.  
Medical College of Wisconsin  
Meta House, Inc.  
Milwaukee Turners Foundation/4th Street Forum  
Milwaukee Urban League  
Museum of Wisconsin Art  
National Coalition of Community Foundations For Youth  
National Foundation for the Centers for Disease Control & Prevention  
Optical Society of America, Inc.  
Pewaukee Area Historical Society, Inc.  
PTA Wisconsin Congress  
Social Development Commission  
University of Wisconsin - Milwaukee Foundation  
Urban Faith Roundtable  
Urban Underground, Inc.  
Women's Fund of Greater Milwaukee, Inc.

## PARTNER FOUNDATIONS

Our partner foundations help donors in communities throughout the metropolitan area maximize their charitable giving and support the work done by local organizations. Each has its own volunteer board made up of local leaders who are aware of the needs of their individual communities. While these affiliates focus their efforts on grantmaking, the Greater Milwaukee Foundation provides administrative support and investment expertise.

### Greater Cedarburg Foundation

The Greater Cedarburg Foundation hit a major milestone with its Legacy Society in 2010. The society was the brainchild of Don Rintelman, former foundation president and a prominent Cedarburg attorney, as a way of recognizing community members who contributed to the foundation. Rintelman wished to see it grow from 13 to 100 members before the end of his term, but died unexpectedly in 2006 before he could witness that accomplishment. In the fall, the society reached 100 members and more than \$1 million in commitments. The milestone member was Rintelman's daughter, Katie Rintelman Pipkorn, who received a commemorative plaque honoring her father's efforts.

In 2010, the foundation awarded \$83,790 to 13 local agencies.

For more information, visit [www.cedarburgfoundation.org](http://www.cedarburgfoundation.org).



Katie Rintelman Pipkorn, 100th Legacy Society member  
Photo by Mark Justesen

### Oconomowoc Area Foundation

Among the many projects that the Oconomowoc Area Foundation supported in 2010 were several that helped children at work and at play. Oconomowoc High School was able to enhance its science curriculum through use of new probe-based measurement technology thanks to an \$8,000 grant. A \$10,000 grant to the Oconomowoc Public Education Foundation provided enhancements to the Oconomowoc Arts Performing Center including seating upgrades, wireless microphones and a polished wood acoustical concert shell. Children of all ages benefited from a \$5,000 grant made to the Friends of Imagination Station, a nonprofit that supports maintenance and beautification of Imagination Station. The money supported the creation of a handicapped-accessible bathroom and other playground enhancements at what is Waukesha County's first fully-inclusive playground.

In 2010, the foundation awarded \$344,760 to 50 agencies.

For more information, visit [www.oconomowocareafoundation.com](http://www.oconomowocareafoundation.com).



Imagination Station playground in Oconomowoc  
Photo by Mark Hines

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## West Bend Community Foundation

The West Bend Community Foundation, the Foundation's first partner foundation, celebrated 10 years of grantmaking in 2010. Originally launched by civic leaders Cliff Nelson and Doug Ziegler, the foundation was seen as a simple way to create a legacy that would forever benefit the community. Within three months of its start, organizers received more than \$2 million in unrestricted gifts. Since that time, the foundation has grown to 26 funds and has awarded more than \$11 million in grants.

The foundation created the Founders' Service Award to commemorate the milestone. It recognizes the organization that made the biggest community impact with a foundation grant. The first award went to Enchantment in the Park, an annual holiday lights display that raised money for local West Bend food pantries.

In 2010, the foundation awarded \$2.1 million to 133 agencies.

For more information, visit  
[www.westbendcommunityfoundation.org](http://www.westbendcommunityfoundation.org)



Enchantment in the Park  
Photo courtesy of West Bend Community Foundation

## SUPPORTING ORGANIZATIONS

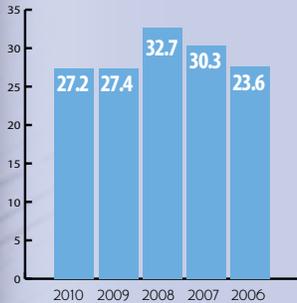
A supporting organization is another alternative to a private foundation that allows for greater ease and efficiencies in operation. It requires a minimum balance of \$1 million to start and provides donors with lower operating costs, substantial tax advantages and access to a wide range of support services. While affiliated with the Foundation, a supporting foundation is a separate 501(c)(3) organization that has its own board that makes decisions on grantmaking, gift acceptance policies and other governance matters.

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

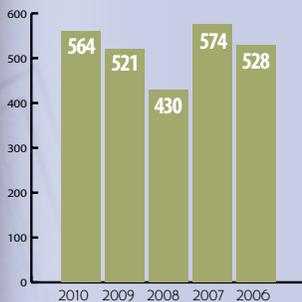
# 2010 FINANCIAL REPORTS

## 2010 and 2009 summary financial statements (unaudited, in thousands)\*

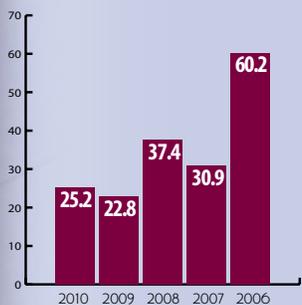
Grants (in million \$)



Assets (in million \$)



Gifts (in million \$)



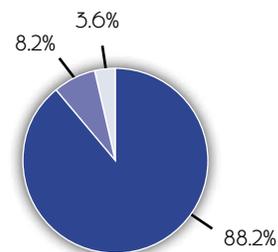
	2010*	2009
<b>Assets</b>		
Receivables, prepaids and other assets	\$ 3,560	1,198
Investments, cash and cash equivalents	555,004	515,111
Beneficial interest in charitable trusts	4,532	4,172
Property, furniture and equipment, net	464	520
<b>Total assets</b>	<b>\$ 563,560</b>	<b>521,001</b>
<b>Liabilities and net assets</b>		
Accounts payable and accrued liabilities	\$ 956	1,063
Grants payable**	15,515	19,465
<b>Net assets</b>	<b>547,089</b>	<b>500,473</b>
<b>Total liabilities and net assets</b>	<b>\$ 563,560</b>	<b>521,001</b>
<b>Revenues</b>		
Contributions	\$ 25,217	22,813
Net investment return	58,728	105,347
Change in split interest agreements	407	881
<b>Total revenues</b>	<b>84,352</b>	<b>129,041</b>
<b>Grants and expenses</b>		
Grants approved**	27,246	27,443
Transfers to other organizations	4,589	1,050
Program expenses	729	2,084
Custodial and investment management fees	682	632
Administrative expenses	4,490	4,119
<b>Total grants and expenses</b>	<b>37,736</b>	<b>35,328</b>
Change in net assets	46,616	93,713
Net assets, beginning of year	500,473	406,760
<b>Net assets, end of year</b>	<b>\$ 547,089</b>	<b>500,473</b>

\* The Greater Milwaukee Foundation is audited annually by KPMG, LLP. Due to the timing of the audits provided by our investment managers, the 2010 financial statements shown above are presented with unaudited results. The final 2010 audited statements are expected to be available by the end of October 2011 and can be found on our website, [www.greatermilwaukeeefoundation.org](http://www.greatermilwaukeeefoundation.org), in the Donors section under investment information.

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

## 2010 expenditures

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

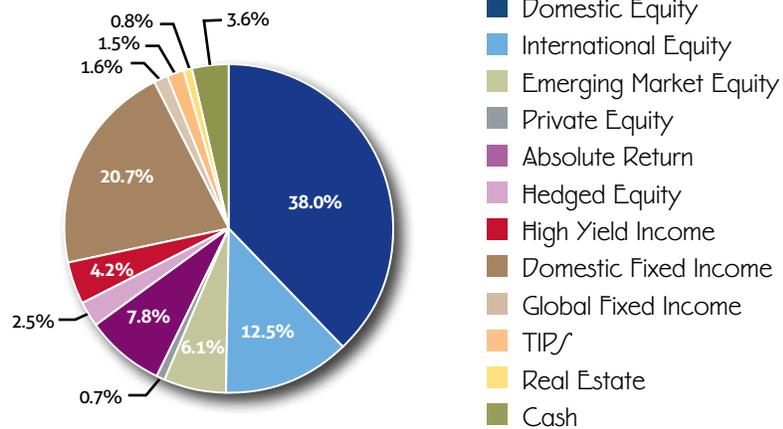


## A balancing act that provides long-term results

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 12/31/2010)

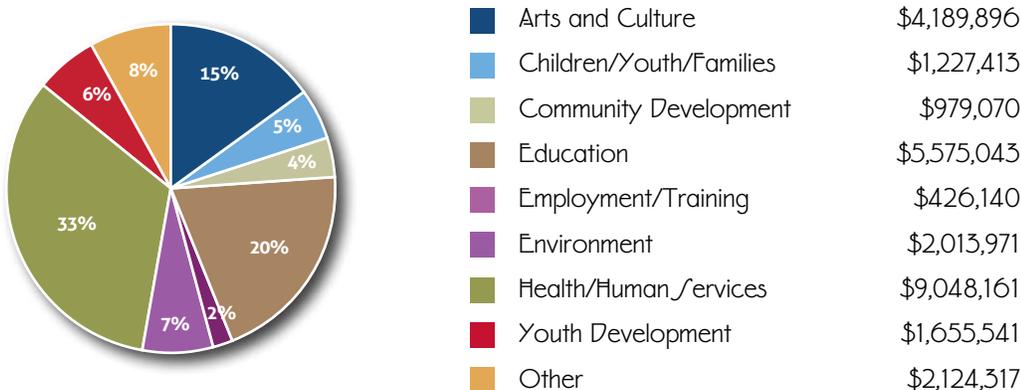
The chart below reflects all invested assets held at the Foundation. Each investment pool has varying asset allocation structures.



### Investment returns (annualized periods ending 12/31/2010)

	1 year	3 year	5 year	7 year	10 year	15 year
GMF Investment Pool	13.5%	1.7%	5.4%	6.6%	5.3%	7.5%
U.S. Bank Trust Pool	12.4%	1.8%	5.6%	6.9%	5.7%	7.6%
Marshall and Ilsey Trust Pool	14.3%	1.2%	5.1%	6.5%	5.3%	7.5%
JPMorgan Chase Trust Pool	14.4%	3.1%	6.5%	7.4%	6.4%	8.7%
S&P 500	15.1%	-2.9%	2.3%	3.8%	1.4%	6.8%
Morningstar Moderate Allocation	11.7%	-0.2%	3.2%	4.3%	3.0%	5.8%

**Grant Summary** The chart below reflects grants awarded through use of all Foundation funds.



# HERBERT J. MUELLER SOCIETY



Herbert J. Mueller

The Herbert J. Mueller Society recognizes the efforts of professional advisers who have either referred clients to or worked on behalf of the Greater Milwaukee Foundation. It honors attorney Herb Mueller, a quiet and humble man who, by the time he died in 2001 at age 91, worked with clients to create gifts to the Foundation totaling nearly \$50 million. In 2010, 30 new members were invited to join.

Timothy R. Aik  
Robert G. Alexander  
Steven R. Allen  
Randy Averill  
John R. Balistreri  
John T. Bannen  
Richard A. Behrendt  
Casey J. Berrall  
Mark G. Berry  
David J. Bohl  
Barbara A. Bombaci  
Nancy M. Bonniwell  
Wendy Reed Bosworth  
Rick Bottoni  
Evelyn L. Brown  
Peter W. Bruce  
Andrew P. Brusky  
Peter Brusky  
Ralph D. Bultman  
John F. Callan  
Chris Calvelli  
Terry L. Campbell  
Tim Carr  
Dianne S. Cauble  
David Cerny  
Christopher F. Chlupp  
Keith A. Christiansen  
Ann W. Conis  
Marybeth Cottrill  
Jennifer R. D'Amato  
James F. Daly  
John W. Daniels Jr.  
Edward David  
David M. Davis  
Ruthann M. Davis  
Linda de la Mora  
Edward H. DeFrance  
Dean P. Delforge  
Jameson P. Delgadillo  
Richard Dieffenbach  
Paul M. Dimick  
George A. Dionisopoulos  
Louis Dodulik  
Steven R. Duback  
Janice L. Dusold  
Sarah A. Ehrhardt  
Jack A. Enea  
David Epstein  
John W. Ethington  
George A. Evans Jr.  
J. Douglas Fitzgerald  
Gerard J. Flood  
Aless Flores  
Norman J. Fons  
Jay M. Frank  
Thomas L. Frenn  
Robert Fricker  
Frederic G. Friedman  
Richard S. Gallagher  
Chris K. Gawart  
Franklyn M. Gimbel  
Kathleen M. Gingrass  
Sheryl A. Gist  
Thomas P. Glembocki  
Kathleen A. Gray  
W. Scott Gray  
Brent E. Gregory  
Jill H. Brodkey  
Brandon R. Hall  
Philip J. Halley  
Lawrence J. Haskin  
Joseph L. Heil Jr.  
Joseph H. Helm  
John A. Herbers  
Daniel M. Hess  
David Hilker  
Krislyn M. Holaday  
Carl D. Holborn  
Mark J. Homan  
Ruth J. Irvings  
Philip Holland  
James C. Janikowski



Valerie A. Johnson  
Norah Jones  
Myron L. Joseph  
Patricia Jursik  
Brad Kalscheur  
David L. Kinnamon  
Adam W. Kiracofe  
John V. Kitzke  
Kathleen D. Klein  
Joan D. Kimpel  
Gordon P. Knuth  
Andrew C. Komisar  
Matthew M. Kons  
Thomas W. Kosler  
Ronald Krizek  
John G. Krueger  
Gwen E. Kuber  
Christine M. Kuykendall  
Jeffrey A. La Bri  
Louise E. Ladd  
Katherine W. Lambert  
Tim Langer  
John J. Laskowski  
Scott A. Latzke  
Andrew R. Lauritzen  
Kristi E. Leswing  
H. Ben Levy  
John H. Lhost  
Robert J. Loots  
Wayne R. Lueders  
Margaret Lund  
Charles G. Maris  
Mary Kay Mark  
Michael L. Matrise  
Michael G. May  
Steven D. Mayer  
Bradley D. Mazola  
N. Lynnette McNeely  
Katherine M. Menacher  
Gally Merrell  
Gordon K. Miller

Jaclynn M. Miller  
Mark W. Miller  
Daniel W. Morse  
John Movroydis  
David E. Muchow  
Judith C. Murphy  
Patricia J. Nelson  
Randy S. Nelson  
Timothy A. Nettesheim  
Christopher B. Noyes  
Diane K. O'Connor  
William O'Connor  
Timothy S. O'Malley  
John K. O'Meara  
Jennifer M. Olk  
Richard Ormsby  
Steven E. Osgood  
Margaret M. Paur  
J. Lewis Perlson  
Laura J. Petrie  
John M. Phillips  
Mark S. Poker  
Daniel J. Potter  
Stephanie G. Rapkin  
James S. Reeve III  
John M. Remmers  
Timothy K. Reynolds  
Scott Richardson  
Ann M. Rieger  
Linda Rieke  
J. Patrick Ronan  
Fredrick J. Safer  
Allen M. Salomon  
Brenda Schlais  
Joe Schlidt  
Gregory J. Schmidt  
Kenneth J. Schneider  
Patrick R. Schultz  
Denasha A. Scott  
Elaine A. Shanebrook  
Mark A. Shiller

Nancy L. Shue  
Frederick J. Fitzberger  
Todd W. Sivak  
Christopher Smith  
Michael R. Smith  
Robert W. Snyder  
Sara E. Snyder  
Peter M. Sommerhauser  
James R. Sommers  
Greg Sommersberger  
Ronald N. Spears  
James A. Spella  
Thomas L. Spero  
John W. Stevens  
John A. Stocking  
Mark A. Stoffel  
Everett J. Stone  
William A. Swendson  
Barry W. Szymanski  
J. Steven Tikalsky  
Paul J. Tillemann  
Amalia Levit Todryk  
Paul T. Tourville  
Gregory D. Wait  
Wendy M. Wallace  
Eido M. Walny  
Cyd Walters  
Thomas J. Warden  
Frances E. Wargolet  
David A. Weber  
Bernard J. Westfahl  
Paul E. Westphal  
Thomas J. Wieland  
Adam J. Wiensch  
Jennifer M. Williams  
Andrew J. Willms  
James M. Wozniak  
Allan T. Young  
Mark Zalewski  
Nate Zastrow

# CELEBRATING CIVIC VOLUNTEERS

## Tom and Maripat Dalum Sharon Adams



Tom and Maripat Dalum | Photo by John Kimpel



Sharon Adams

William C. Frye and Frank Kirkpatrick took seriously their commitments as civic volunteers. Both gave freely of their time and talents to make the greater Milwaukee area an even better place and both left money with the Greater Milwaukee Foundation to recognize the efforts of others who have done the same.

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

### WILLIAM C. FRYE AWARD

The Frye Award honors individuals whose volunteer efforts contribute toward the betterment of the community.

Waukesha County residents **Tom and Mary Patricia Dalum** continue the long tradition of putting community first that Frye believed in. Their generosity spans decades and crosses county lines to serve those with the greatest need.

While each have their own interests – Maripat focuses on women’s and girl’s issues and Tom has worked closely with organizations such as ARC of Greater Milwaukee and the Boy Scouts of America Potawatomi Area Council – they also have united to benefit many others. The Dalums have

been instrumental in helping build the capacity of several organizations through capital campaigns for the United Way in Waukesha County, St. Catherine’s Residence and St. Ann Center for Intergenerational Care.

### FRANK KIRKPATRICK AWARD

The Kirkpatrick Award acknowledges the work of those who have enhanced the quality of life in greater Milwaukee, particularly through real estate, physical development and redevelopment projects.

**Sharon Adams** is the co-founder and driving force behind Walnut Way Conservation Corp., a resident-led, community organization that serves a north side neighborhood where she grew up. Under her leadership, Adams has helped restore neighborhood pride, value and promise.

Once described as too dangerous to venture into even during the middle of the day, the neighborhood has since become a destination. Vacant lots have been transformed into fruit orchards and urban gardens. A former drug house has become an educational hub. In 2008, the agency was selected to spearhead the revitalization efforts in the nearby Lindsey Heights neighborhood as part of the Zilber Neighborhood Initiative.

# COMMITTEES

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## Administration and Audit Committee

Thomas L. Spero, chair  
Peter W. Bruce  
George C. Kaiser  
David J. Kundert

## Awards Committee

Judy Jorgensen, chair  
Aless Flores  
Franklyn M. Gimbel  
Jacqueline Herd-Barber

## Communications Committee

Franklyn M. Gimbel, chair  
Jeff Fleming  
Kathy Lambert  
Richard White

## Development Committee

Peter W. Bruce, chair  
Joan D. Klimpel  
David J. Lubar  
Mary B. Read  
Blaine E. Rieke  
Paul Roller  
Kathleen B. Schrader  
Todd W. Sivak

## Governance and Nominations Committee

John W. Daniels Jr., chair  
Janine Geske  
Judy Jorgensen

## Investment Committee

David J. Kundert, chair  
Wendy Reed Bosworth  
Mark G. Doll  
David J. Lubar  
Stephen H. Marcus  
Marlyn Spear  
Thomas L. Spero  
Frederick P. Stratton Jr.

## Program Committee

Aless Flores, chair  
Jacqueline Herd-Barber, vice chair  
Wendy Reed Bosworth  
Peter W. Bruce  
John W. Daniels Jr., ex officio  
Janine Geske  
Franklyn M. Gimbel  
Mary B. Read

## Mequon/Hiram Schmitt Fund Advisory Committee

Lew Perlson, chair  
Herbert M. Hillman  
Mark A. Langholz  
James Liska  
Ralph Stevens

## Shaw Scientist Advisory Panel

Paula Traktman, Ph.D., Medical College of Wisconsin, chair  
Ellen Fanning, Ph.D., Vanderbilt University  
Irwin Fridovich, Ph.D., Duke University  
Owen Griffith, Ph.D., Medical College of Wisconsin  
John Lipscomb, Ph.D., University of Minnesota

### Office of the President

Ellen M. Gilligan, president and CEO  
Aileen Rogers, executive assistant

### Communications and Marketing

Rob Guilbert, vice president  
Becca Mader, senior communications writer  
Paula J. Perez, webmaster and graphic artist

### Community Investment

Kathryn J. Dunn, vice president  
Heather Clark, program assistant  
Jeannie Fenceroy, senior program officer  
Fred Gutierrez, senior program officer  
Janel M. Hines, senior program officer  
Fran Kowalkiewicz, grants manager  
James A. Marks, director of special projects  
Darlene C. Russell, program officer  
Carol Wilson, scholarship and program coordinator

### Community Partnerships

Marcus White, vice president

### Development and Donor Services

Karen Rogers, vice president  
Rafael J. Acevedo, Jr., senior donor services officer  
Susan Baran, senior gift planning officer  
Andrea C. Bostwick, development and donor services assistant  
Marybeth Budisch, senior donor services officer  
Katie Cummings, development and donor services manager  
Doris H. Heiser, director of donor services  
Jedd Lapid, director of development and donor services  
Barb Tibbals, development and donor services associate

### Finance and Administration

Patti Dew, vice president and chief financial officer  
Yelena Chester, senior accountant  
Patricia Cole, receptionist  
Bryan Demerath, database and systems administrator  
Tracy Hamley, finance and human resources assistant  
Sharon Loxton, senior financial analyst  
Craig Nuechterlein, director of operations  
Wendy Ponting, accounting manager  
Stacie Shephard, accounting assistant  
Maureen Swula, director of human resources



Strengthening Communities through Effective Partnerships



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Strengthening Communities Through Effective Partnerships



Confirmed in compliance with  
National Standards for U.S. Community Foundations