



the spirit of
COMMUNITY



Waukesha Freeman Photo



WAUKESHA COUNTY

Community
FOUNDATION

2021 ANNUAL REPORT





OUR MISSION

The Waukesha County Community Foundation is a pool of permanent endowment and project funds created primarily by and for the people of Waukesha County to provide grant support to charitable organizations. The intent of the Foundation is to serve a broad spectrum of community needs.

2021-22 WCCF BOARD AND STAFF

Back row: Victor Shultz, Judie Taylor, Dave Provancher, Karin Kultgen, Ann Tessmer, Tim Beine

Middle row: Curt Brewer, Alicia Kiser, Stacie Andritsch, Stephanie Riesch-Knapp, Fred Stier, Jim Moore

Front row: Rachel Bennett, Marybeth Budisch, Jerry Flood, Ashley Dobrzyski, Jane Stromwell, Dr. Ann Bartos Merkow, Melissa Baxter

Not pictured: Pat Boelter, Mervyn Byrd, Coreen Dicus-Johnson, Dave Frank, John Matter, Bridget Posta, Jan Wade



2021-22 OFFICERS

Chair – Curt Brewer

Past Chair – Karin Kultgen

Vice Chair – Dr. Ann Bartos Merkow

Secretary – Dave Frank

Treasurer – Tim Beine

STAFF

Melissa Baxter, President

Jim Moore, Director of Operations

Rachel Bennett, Grants Manager

Bridget Posta, Office Administrator

COMMUNITY *Gratitude*



Dear Friends of the Waukesha County Community Foundation:

Community is about unity, bringing people together around common causes. Community means finding ways to connect and convene, even in challenging times. It's about generosity and compassion, inspiring hearts, and expanding minds.

In 2021, like never before, our community came together in unity and responded to tragedy with an outpouring of care through actions and gifts that affirms who we are – in Waukesha County and beyond.

We know philanthropy makes a difference, and that difference can bridge the chasm between despair and hope. While our community's response to the Waukesha Christmas Parade attack is awe inspiring, at the Foundation we get to work every day with philanthropists who are making an impact in the nonprofit sector through grants and scholarships.

This past year, the Foundation awarded more than \$7.5 million in grants. As you review this report, please know that our impact is only possible through your generosity. Since our founding in 1999, the Foundation has continued to grow and so has our impact. Thank you for all you have done and will do to make Waukesha County a special place to call home.

With gratitude,

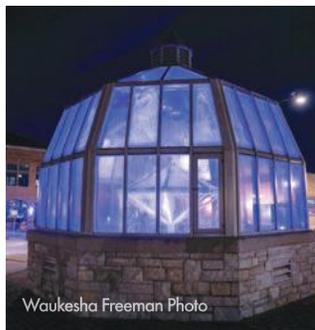

Melissa Baxter
President


Curt Brewer
2021-22 Board Chair

COMMUNITY Response



Waukesha Freeman Photo



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Waukesha Freeman Photo



On November 21, 2021, the unthinkable happened. The Waukesha Christmas Parade, a tradition since 1962, became the site of a tragic attack that killed six, injured dozens, and traumatized hundreds. Hours later, the Waukesha County Community Foundation partnered with United Way of Greater Milwaukee and Waukesha County to create the United for Waukesha Community Fund. The fund provides a charitable vehicle for donors to assist victims and is held at the Foundation, which is administering the fund at no fee as part of our service to the community.

The response from the community was immediate and overwhelming as the fund would go on to raise more than \$6 million from over 15,000 donors. Fundraisers were held throughout southeastern Wisconsin. Individuals and businesses used their talents to create ornaments, coffee mugs, t-shirts, bracelets, and more. Gifts to the fund came from beyond our borders as well, from all 50 U.S. states and 17 additional countries. #WaukeshaStrong became more than words or a hashtag – it became a guiding mantra and a promise that the strength of our community’s response will be our legacy.



DONATE

www.WaukeshaFoundation.org/Parade

The United for Waukesha Community Fund will remain open until December 31, 2022, and gifts are still being accepted. When the fund closes, 100% of the remaining funds will be disbursed to victims who applied by submitting a qualified claim form by February 28, 2022.



Waukesha Freeman Photo

COMMUNITY Impact

More than **\$7.5 MILLION GRANTS AWARDED** in 2021

WCCF Funds of all kinds make a significant community impact.

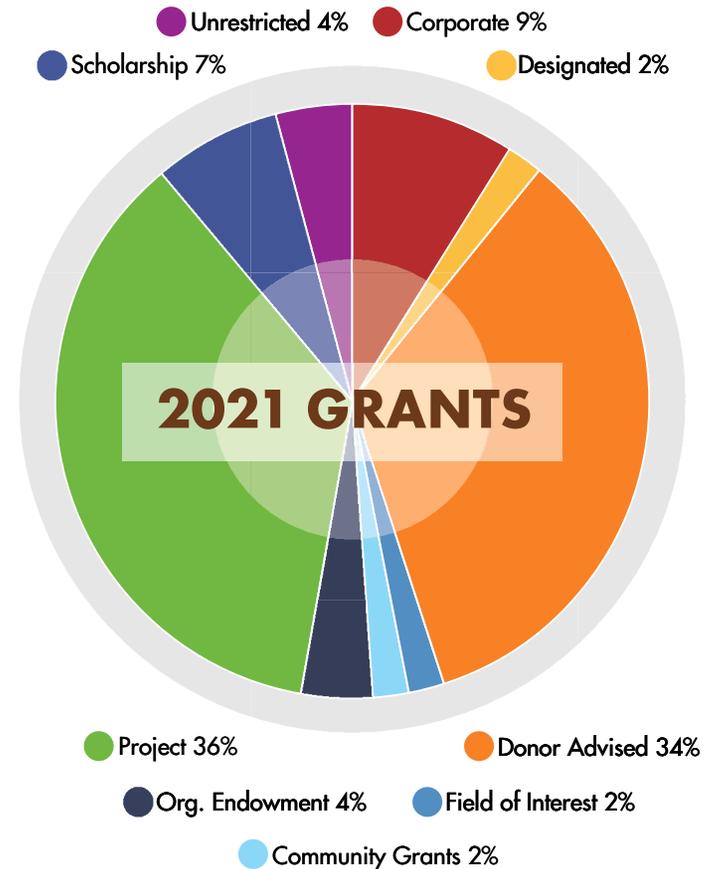
2021 STATEMENT OF REVENUES & EXPENSES

REVENUE	2021 *	2020
Contributions	\$21,941,245	\$6,366,974
Special Event		
Income	\$29,320	\$0
Expense	(\$28,463)	\$0
Net Investment Return	\$6,965,634	\$3,842,899
Administration Fees	\$604,153	\$99,102
Total Revenue	\$29,511,889	\$10,308,975

EXPENSES	2021 *	2020
Program Services - Grants	\$7,552,156	\$3,528,955
Management and General	\$1,298,324	\$224,377
Fundraising	\$19,792	\$23,700
Total Expenses	\$8,870,272	\$3,777,032

Change in Net Assets	\$20,641,617	\$6,531,943
Net Assets Beginning of Year	\$48,097,404	\$41,565,461
Net Assets End of Year	\$68,739,021	\$48,097,404

*2021 reflects unaudited numbers based on end of year financials





COMMUNITY *Celebrations*

We were able to again celebrate in person for our two annual events in 2021. In August, we celebrated with fundholders and friends and honored John Macy for his outstanding philanthropic leadership at our Celebration of Giving. In October, the Giving Forward Breakfast included our community partners and the announcement of our 2021 community grants.





COMMUNITY *Grants*

Each year, we award Community Grants to nonprofit organizations making a difference for the people of Waukesha County.

ACAP, Inc. Interim Week Special Presentations

Support ACAP's semi-annual "Interim Week" event full of presentations by up to 18 expert guest speakers.

Christmas Clearing Council

Database, Software, Website & Equipment Upgrade

Fund database, software, website, and equipment upgrades necessary to provide services and broaden CCC's impact.

Diverse and Resilient, Inc. Waukesha LGBTQ Support

Support outreach efforts in Waukesha County to improve health equity, safety, and well-being of LGBTQ+ people through providing education to future healthcare providers and other social service providers in Waukesha County.

Donna Lexa Art Centers Open Studio at DLAC

Support the DLAC Open Studio programming in Waukesha through funding costs related to teacher pay, facilities, and art supplies.

Down Syndrome Association of Wisconsin, Inc.

DSAW Connects Virtual Education Series

Expand Down Syndrome Awareness Wisconsin "DSAW" Connects virtual education series for individuals with Down Syndrome and related disabilities to learn daily living skills, strengthen their social functions, and practice a healthy lifestyle.

Elmbrook Senior Taxi, Inc Transportation Manager

Support the salary of the Transportation Manager to expand transportation services for seniors and adults with disabilities in the Waukesha area while continuing to keep affordable rates.

Good Friend Inc. Revitalization and Expansion

Support the expansion of autism awareness and acceptance through funding the development of an e-learning curriculum and supplemental tools for teachers, social workers, and counselors.

GPS Education Partners, Inc.**Manufacturing Your Apprenticeship Program**

Support the Manufacturing Youth Apprenticeship Program that provides disengaged high school students hands-on learning opportunities and personalized learning plans within an immersive business environment where students gain real-life work experience.

Greater Milwaukee El Sistema Community Nights

Sustain "Community Nights" where students and adults have a safe place to enjoy a free meal, tutoring from paid instructors, entertainment, and service projects that strengthen our community.

Habitat for Humanity of Waukesha County, Inc.**Prairieville Village Development**

Fund the revitalization of White Rock Avenue through the creation of a small subdivision "Prairieville Village" that will provide deserving Waukesha County families affordable housing.

Healing Hearts of Waukesha School-Based Grief Support

Support the School-Based Grief Support program, providing 8-week grief support groups to partnering Waukesha County schools and educational opportunities for faculty and parents/guardians.

Hope Center**A Hand Up for Waukesha County Residents in Need**

Support the Outreach Community Meal/Day Center breakfast and lunch programs, and the Clothing Shop and Project Move programs, which address Waukesha County community needs to prevent homelessness.

La Casa de Esperanza, Inc.**Youth Development: Charter School & Out of School Programming**

Support the Charter School & Out of School Programming to help close the achievement gap within low-income and minority families in Waukesha.

Lad Lake, Inc. Community Engagement

Fund the development of a rest area alongside the Glacial Drumlin State Trail to engage Waukesha County residents and share the mission of Lad Lake. Additionally, support of a new memorial area for residents and staff to reflect and meditate.

Life Navigators**Special Needs Trust & Futures Planning - Providing Peace of Mind**

Support the Special Needs Trust Program designed to promote comfort and happiness, improve the quality of life and supplement, protect, and preserve benefit programs for individuals with disabilities.

Prevent Blindness Wisconsin Children's Vision Health Program

Provide Waukesha County children preventative vision health care.

Revitalize Milwaukee Safe and Healthy Homes

Provide critical home repair services to Waukesha County low-income homeowners and those with limited physical mobility.

SaintA, Inc.**Waukesha County School Based Mental Health Program**

Support the School Based Mental Health Program that addresses a growing youth mental health crisis by making high-quality mental health services easily accessible to K-12 students in Waukesha County.

Sleep in Heavenly Peace, Inc.**No Kid Sleeps on the Floor in Our Town!**

Fund "Bed Build Days" for the construction of 20 new fully furnished beds for 20 Waukesha County children in need.

Tricia's Troops Cancer Connection CARE Program

Fund the Cancer Assistance Relief and Encouragement "CARE" Program, which provides tangible support needed to address the costs and burdens associated with cancer treatment.

Waukesha Civic Theatre Academy Bilingual Theatre Outreach

Support Bilingual Theatre Outreach programming which will provide students with an introductory experience in theatre education with a goal of elements of the Spanish language being incorporated into the learning and activities.

Waukesha County Historical Society and Museum**Museum ToGo: Digital & In-Classroom Resources**

Support the transition of educational programs to both digital and no contact delivery through funding the purchase of video and sound recording equipment, editing hardware and software, and direct material expenditures needed to create hands-on learning activity kits for students.

Waukesha String Académie String Académie 2.0

Support program expansion in Waukesha County to increase enrollment of students.

Wisconsin Hero Outdoors, Inc. Women's Initiative

Support monthly meet-ups and two retreats exclusively for female veterans to gather together and experience the outdoors in a safe environment.

Wisconsin Masonic Home Inc.**Concerts in the Park Program Expansion**

Fund the reconstruction of the pavilion at Three Pillars to a safe, accessible, and inviting outdoor event space for Waukesha County seniors and their families to enjoy.

Wisconsin Veterans Network**Intake, Assessment and Advocacy for Waukesha Veterans and Families**

Support the Intake, Assessment and Advocacy Program that connects veterans with the agencies who can best meet their needs as quickly and effectively as possible.

Your Choice to Live, Inc.**Prevention Support Services in Waukesha County**

Expand the drug and alcohol prevention services for students, parents, and community members throughout Waukesha County.



COMMUNITY Choices

At Waukesha County Community Foundation, we partner with philanthropists of all interests and offer a variety of choices when it comes to available funds. Take a look at the options – we’d love to talk to you about how to best meet your community impact goals!

Donor Advised Fund – a giving vehicle that provides donors with immediate tax benefits and the ability to provide ongoing support to nonprofits as the fund continues to grow. Donor Advised Funds are an efficient and cost-effective alternative to private or family foundations. (Minimum \$25,000)

Donor Designated Fund – designed to provide perpetual support to a specific nonprofit the donor has identified. (Minimum \$10,000)

Agency Fund – established by tax-exempt, nonprofit organizations to establish an endowment, assist with gift planning, and provide long-term financial sustainability. (Minimum \$1,000)

Field of Interest Fund – created to support a specific area of interest. (Minimum \$25,000)

Corporate Fund – provide a streamlined way for corporations to manage their community giving with WCCF providing investment management along with administrative and reporting support.

Artesian Fund – offer a way to start a fund with a gift of \$1,000 and continue to donate and eventually establish a Donor Advised, Donor Designated, or Field of Interest Fund.

Unrestricted Fund – provide support for foundation operations and community grants.

Scholarship Fund – assist students with education support based on specific criteria and an application process. (Minimum \$10,000)

Project Fund – non-endowed fund for a specific and temporary purpose such as a capital project.

102

Donor Advised Funds
379 Grants

59

Donor Designated Funds
47 Grants

78

Agency & Corporate Funds
266 Grants

14

Field of Interest Funds
57 Grants

18

ARTESIAN FUNDS

COMMUNITY *Challenge*

John Macy

Longtime WCCF supporter, former board member, fundholder, and the 2021 Celebration of Giving Award honoree, John Macy, challenged all at the Celebration of Giving to become fundholders and offered a \$500 contribution for each of the 10 newly created funds.

"Everyone has a passion. Mine was, as those who served with me, to make the organization self-sufficient. So that is why I have an operations fund. My wish is that everyone in this room decide what their passion is, what they want to be remembered for, so when the 200th generation of Board members makes a grant request, distributes the money from your fund, your forever fund, they will say who was that person back in 2021 that took the time, found the resources, thought enough about the future to start this fund."



Many thanks to John and to the donors who launched these 10 new funds in response to the challenge:

Ann Tesmer and Dan DeBehnke Family Fund
Craig Husar Family Fund
Dehn Family Fund
Direwolf Fund
Frank Family Fund

Gilbert Ziebell, III and Mary Beth Weber Ziebell Charitable Fund
Krause/Falk Fund for Menomonee Falls
Mark and June Ernst Family Fund
Scullen Family Fund
Vipond Family Fund



84 SCHOLARSHIP FUNDS

362 SCHOLARSHIPS AWARDED

A TOTAL OF **\$554,502**

COMMUNITY Futures

2021 EDUCATION FOUNDATION PARTNERS

Arrowhead
Scholarship
Fund

Elmbrook
Education
Foundation

Kettle Moraine
Education
Foundation

Menomonee Falls
Scholarship and
Educational Foundation

Waukesha
Education
Foundation

STOWELL SCHOLARSHIPS FUND THE FUTURE

When Ken and Judy Stowell got married, neither of them had completed college. However, they understood the importance of education and remained focused on achieving their goals, all while raising their young family. "It was overwhelming," said Ken.

Their hard work and persistence paid off, and they became the first in their families to attend and graduate college. Ken credits education as a key in achieving business success as the owner of Lannon Tank Corporation. "We were from humble beginnings, but we are where we are because of education," Ken said.

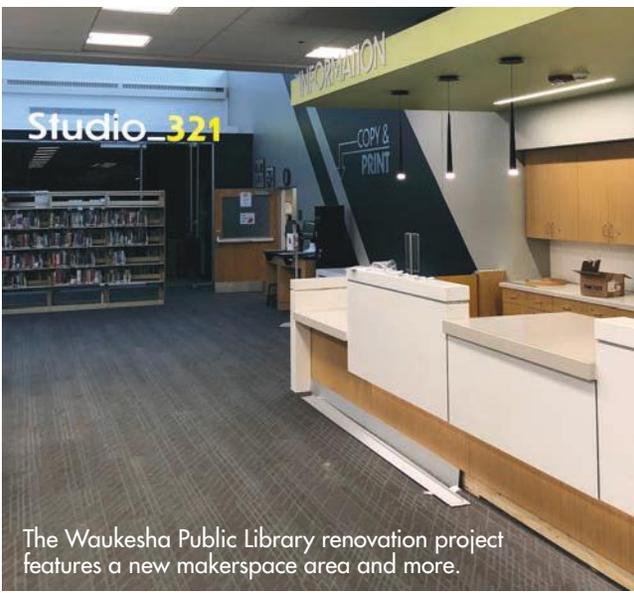
They passed that legacy to their own children and then, they expanded their reach. The Stowell Family Scholarship Fund, created in 2018, has already impacted 36 students, and it's poised to further increase its impact in Waukesha County in spring 2022.

The Stowell Scholarship is currently available at 16 Waukesha County public high schools. The scholarship is a four-year award of \$10,000, and it rewards persistence with annual payments increasing in size from \$1,000 in year 1 to \$2,000 in year 2 to \$3,000 in year 3 and \$4,000 in year 4.

Scholarships are an important way donors can invest in the future of our community through students, and Ken and Judy value the opportunity to pay forward their success. "We believe in education," Ken said.

Contact WCCF for more information about creating a scholarship fund and impacting future generations through educational support.

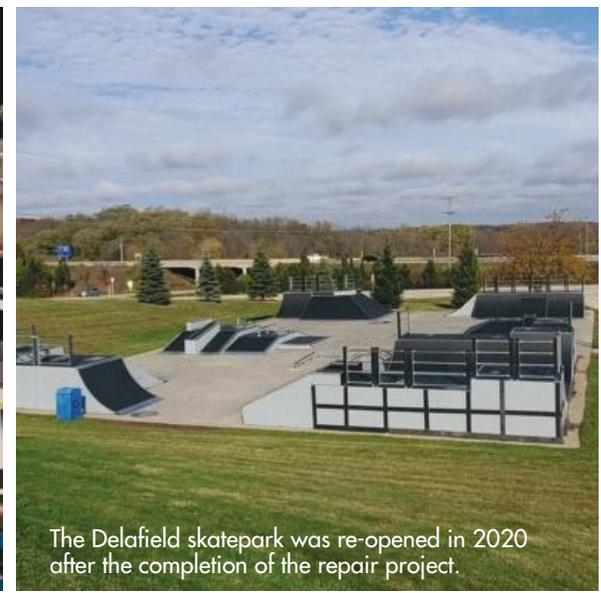




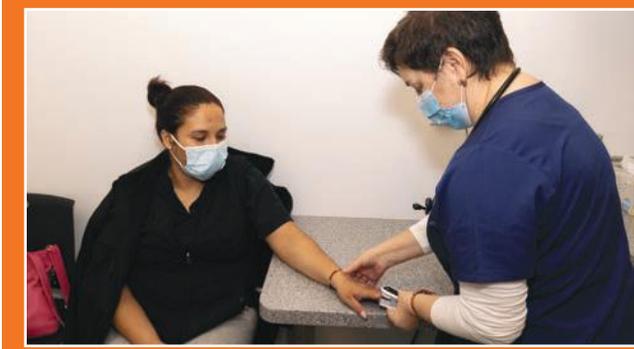
The Waukesha Public Library renovation project features a new makerspace area and more.



The Waukesha Civic Theatre is expanding to add classroom, performance, rehearsal, reception, and office space.



The Delafield skatepark was re-opened in 2020 after the completion of the repair project.



The Waukesha Free Clinic at Carroll University provides free healthcare services and improves access to healthcare delivery in our community.

COMMUNITY *Projects*



Along with their children, Sue Marriott (at podium) and Sheila Freisinger share information about Journey21 at the Giving Forward Breakfast.

The impact of WCCF Project Funds can be seen throughout our community, from the Delafield Skatepark to Oconomowoc Supports the Blue, from the Waukesha Free Clinic to Journey21, and from the Waukesha Civic Theatre to the Waukesha Public Library.

Project Funds are important to our community as they provide a giving vehicle for charitable projects by local government entities, 501c3 charities, and community organizations. Designed for short-term projects with big impact, the Foundation provides the expertise and administrative support to let project teams focus on completing the work while offering donors a way to give – including online giving or gifts of stock or cryptocurrency.

Project Funds are an efficient and effective way to raise the funds needed for community improvements. Once completed, the projects themselves are a testament to the donors and leaders who work to make good things happen in Waukesha County.

Contact the Foundation if you are interested in starting or contributing to a project fund.

COMMUNITY *Vision*

How do we envision the future? We do it collaboratively.

In the midst of a global pandemic, the WCCF Board of Directors launched a strategic planning process to create a three- to five-year roadmap to position the Foundation for growth and success, align leadership to a common goal, and guide management practices. Several months and 33 interviews later, the organization's strategic plan was presented to the board in spring 2021.

With gratitude for WCCF's history, we are focused on the future and four strategic pillars to guide our way.

GROWTH – growing the foundation's portfolio means increasing our impact and the philanthropic legacy of the foundation and our fundholders.

IMPACT – leveraging our internal and external relationships along with resources provides an opportunity to address a flagship issue critical to Waukesha County.

PROMOTION – educating and engaging the philanthropists and community members of Waukesha County with consistent and informative communications.

CAPACITY – continuing to build a strong infrastructure and internal operations to achieve our strategic goals.

WCCF looks forward to providing philanthropic partnership and leadership to ensure a bright future for our community.



COMMUNITY *Housing*

Housing does more than provide physical shelter. It provides a sense of belonging, safety, and a community to call home. This foundational issue – Safe and Affordable Housing – was selected during the strategic planning process as WCCF's flagship issue.

WCCF's board and staff are committed to launching our work in this area and have started initial steps of connecting with stakeholders. Look for more news to come in 2022 as we partner with other organizations in our community working in the area of housing.

THANK YOU

Shelli



Shelli Marquardt

Retired President Shelli Marquardt joined WCCF in July 2016. She led the Foundation at a crucial time, spurring unprecedented growth, navigating a global pandemic, and launching the United for Waukesha Community Fund.

With Shelli's leadership, the Foundation grew from \$38.7 million in assets in 2016 to \$68 million in assets by the end of 2021.

Enjoy your well-earned retirement, Shelli, and most of all, thank you!



130 years of enriching communities.

Northern Trust is proud to support the Waukesha County Community Foundation. For more than 130 years, we've been meeting our clients' financial needs while nurturing a culture of caring and a commitment to invest in the communities we serve. It's all part of being a good neighbor.

FOR MORE INFORMATION CONTACT

James S. Reeve, III
Senior Vice President – Wealth Strategist
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WEALTH PLANNING | BANKING | TRUST & ESTATE SERVICES | INVESTING | FAMILY OFFICE



How we build **COMMUNITY**

Since 1999, WCCF has helped good things happen in Waukesha County through partnership and collaboration with donors, nonprofits, and other funding organizations. We build community by providing:

LOCAL EXPERTISE. We have deep roots in our community and a broad understanding of local needs. We provide the due diligence for our fundholders and donors to ensure their gifts and grants are effective and meaningful.

TRUST AND ACCOUNTABILITY. WCCF is committed to excellent stewardship through our investment partners and through the grants which make a difference in Waukesha County and beyond. We are accountable to our donors, our board, and our community.

PERSONALIZED ATTENTION. Every one of our donors and fundholders wants to make an impact in their own way. Your charitable goals are our charitable goals, and we look for ways to educate and explore the best way to make them a reality.

THE POWER OF FOREVER. WCCF's endowed funds are designed to grow in perpetuity. Through careful stewardship, fundholders and donors help meet the needs of today while ensuring the long-lasting impact of resources for tomorrow's challenges.

Contact WCCF to discuss how we can help you realize your philanthropic goals through creating or contributing to a Foundation fund. We look forward to partnering with you.



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