Helping Donors Share

Community Foundation

FOR THE FOX VALLEY REGION, INC.

2018 REPORT TO THE COMMUNITY

Dreams of a bright tomorrow

We live in a special place with people who deeply care about one another and their communities. The culture of philanthropy in the Fox Valley region goes back many generations.

It is that spirit of giving that sparked the beginning of the Community Foundation's story in 1986. A few visionary community leaders had a dream that the humble nonprofit Community Foundation they established would be embraced by caring people to give back to this special place that enriched their lives. That dream continues to become reality in new ways as more people, businesses and organizations establish charitable funds that provide grants to benefit favorite nonprofit organizations today and forever. The generosity of our region is reflected in our ranking as the second-largest community foundation in Wisconsin and 61st in the country.

We reflect with reverence upon our founders as we celebrate a milestone year of philanthropy, with a record $28.6 million in grants distributed to nonprofit organizations and more than $133 million donated to charitable funds. *The David L. and Rita E. Nelson Family Fund*, created with a breathtaking $100 million estate gift, is noteworthy even on a national level. We are most grateful for the Nelsons' trust in the Foundation to be a good steward of their gift and capable partner to preserve their legacy.

We commit to being that trustworthy steward for the Nelsons and ***every*** donor who chooses to give to and through the Foundation to make a difference in their communities. That has been our focus, honor and privilege from the beginning and we feel it in a special way in this milestone year. We look forward to helping to fulfill more charitable dreams that strengthen the community today and for a bright tomorrow.

Catherine Tierney
2017-18 Board Chair

Curt Detjen
President/CEO

YEAR AT A GLANCE Year ending June 30, 2018

→ See our audited financial statements at **cffoxvalley.org/CommunityReport**
→ See our investment results at **cffoxvalley.org/Investments**

Stunning gift will improve the community forever

The late David and Rita Nelson stunned the community by leaving the Community Foundation a $100 million estate gift – one of the largest in Wisconsin's history. The extraordinary gift created a charitable fund within the Foundation that will forever benefit causes important to the Nelsons and their family, primarily in the Fox Cities and Green Bay areas of Wisconsin.

The couple lived in De Pere. David was born in Kaukauna and Rita in Janesville. They were married for 73 years and died within five months of each other in 2017 — Rita at age 93 and David at age 96. David Nelson managed the finances for the companies that published the Appleton Post-Crescent and Green Bay Press Gazette. Later he invested in radio stations and other businesses. Rita became a teacher after raising the couple's three sons, returning to college and earning a teaching degree at age 50. She taught for 18 years in the De Pere School District.

The *David L. and Rita E. Nelson Family Fund*, an endowed donor advised fund, is expected to grant $4.5 million a year, forever, when it reaches its full grantmaking ability in 2021. Under the Foundation's endowment grant distribution formula, up to 4.5 percent of a fund's balance can be distributed as grants each year to assure the fund's giving capacity and permanence.

The fund will benefit the couple's charitable interests, including:

- Education
- Health care
- Parks, recreation and waterways
- Community services and community centers
- Historic preservation, including lighthouses, museums and historical societies

Other areas of family interest may be considered, as recommended by the fund's advisory committee. The first grants totaling $3.5 million were awarded in May 2018 to eight nonprofit organizations reflecting David and Rita's personal interests. Additional grants will be awarded annually beginning in summer 2019 and will be determined by the fund's advisory committee working closely with Community Foundation staff.

Learn more about the initial grants, the Nelsons and their incredible gift at **cffoxvalley.org/nelson**.

Himebaugh Legacy Circle

SHAPING TOMORROW TODAY

Hundreds of generous people have planned now for ways to help the community long after they are gone. With the Himebaugh Legacy Circle, we recognize those who have arranged for future gifts to the Community Foundation to benefit their favorite charitable causes and preserve our community's quality of life for generations to come.

We thank 232 Legacy Circle members who have shared their future intentions with us. Whether through a will or from a trust, insurance proceeds or retirement assets, a planned gift is a way you can count your community among your heirs.

To join the Legacy Circle and see the list of members, visit **cffoxvalley.org/Himebaugh**.

"We are inspiring the next generation of innovators."

Katy Compton, Director of Marketing and Programs at the Building for Kids in downtown Appleton, said its new Innovation Lab may have more to teach adults than children. "Part of the goal of the lab is to break down the barriers and show adults that STEM (science, technology, engineering, math) learning does not have to be complicated, it's not as hard as they think and they can totally engage with their kids on these subjects," she said. The lab, which offers kids open-ended activities and hands-on learning focused on experimentation and exploration, is supported by a $35,000 *Bright Idea Fund* grant and a $15,000 grant over three years from the *SECURA Insurance Companies Charitable Fund*.

"You have a sacred job, in the biggest sense of the word."

While in the Fox Valley for the Earth Day grand opening of the Faith Technologies Lodge at Bubolz Nature Preserve in Grand Chute, best-selling author Richard Louv met with staff from eight area nature centers and offered this bit of advice: work together. They are competing against video game makers, popular culture and the computer industry as they try to get kids away from their screens before one of them actually becomes the "Last Child in the Woods," the title of his most popular book. A $25,000 grant from the *Bright Idea Fund* paid for his appearance and the start of the "Need for Nature" campaign, which will teach people about the mental and physical health benefits of getting out in nature.

Strengthening our Community

A record year of grants: $28.6 million

Grants to nonprofit organizations from charitable funds created by people, businesses and organizations, together, are making a difference throughout the Fox Valley region.

By serving as a knowledge resource, catalyst, partner, convenor, mentor and investor, your Community Foundation helps donors, professional advisors and nonprofit organizations improve the quality of life for all, forever. Want to join in the generosity? Contact us - we're happy to help! Enjoy reading a few examples of giving from the past year.

» See our 1,251 grant recipients: **cffoxvalley.org/CommunityReport**

» Learn about grant opportunities: **cffoxvalley.org/Grants**

Get in THE LOOP about what's happening in the Fox Valley area through the Community Foundation: **cffoxvalley.org/loop**

"Participants are telling us the program has changed their life."

The gap is real. Wisconsin was 41st nationally in the Annie E. Casey Foundation's 2017 ranking of equity in graduation rates, college success and other measures of child welfare. The gap in graduation rates between white students and African Americans in the Fox Valley is greater than Milwaukee's. A three-year, $250,000 grant from the *Bright Idea Fund* and $300,000 over three years from the Basic Needs Giving Partnership* helped the Boys and Girls Clubs of the Fox Valley and its eight partners launch STAR (Scholars on Target to Achieve), an intensive mentoring program in Appleton and Menasha public schools. CEO Greg Lemke-Rochon called the results after one semester "exciting."

* The *Basic Needs Giving Partnership Fund* is supported by the *U.S. Venture Fund for Basic Needs* within the Community Foundation, the J. J. Keller Foundation, Inc., and many other community partners.

EDUCATION

HUMAN SERVICES

"We're not just offering office space."

A $1 million expansion and renovation at LEAVEN has created a space to bring together 14 agencies serving those in need, and a better way to link them up with others who can help. "They are going to become part of this new method of delivery of services," LEAVEN Executive Director Mary Parsons said. The Christine Ann Center, Catholic Charities and Energy Services put full-time staff at LEAVEN's new Community Resource Center in September. Parsons said clients are much more likely to follow a referral if there is a "warm handoff" to the other agency. The project received grants from 22 charitable funds within the Community Foundation totaling $614,108.

HEALTH

"There is a growing need to work with kids at younger ages to help with school readiness."

While addressing a shortage of mental health options for teens, Catalpa Health has begun training 15 counselors to address another care shortage through their Infant Mental Health program. Supported by a $40,000 grant from the *Bright Idea Fund* and $16,000 from two donor funds, Catalpa will train these providers to work with parents of children from birth to age 5. Catalpa also expanded its mental health services into Waupaca by opening a clinic for youth after receiving a $50,000 grant from the *Tim and Joy Neuville Family Fund* within the Waupaca Area Community Foundation (WACF), a regional affiliate. The WACF added $7,500.

"It's a fun way to connect community members with issues that they may not even know exist."

The Give Back Bus, a program of Volunteer Fox Cities, has combined volunteering with mystery. People sign up to ride the bus willing to help, but not knowing where they will be volunteering. Having fun volunteering can turn them into long-term volunteers, donors or advocates, Kristin Cates, Marketing and Events Director, said. With the help of a $25,000 grant from the *Bright Idea Fund*, they will provide volunteer opportunities for up to 960 community members who will give 3,840 hours of their time to help 24 local nonprofit organizations.

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Get in THE LOOP cffoxvalley.org/loop

CONNECT WITH US:

Are you in? THE LOOP

Sign up at **cffoxvalley.org/loop** to stay informed about what's happening in the Fox Valley area through the Community Foundation. Receive alerts by text or email - immediate message or weekly or monthly summaries.

Board of Directors 2017-18

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NEW DIRECTORS 2018-2019
Bill Bohn
David Gross
Laura Meronk
Melanie Miller

COMMUNITY ACCREDITED FOUNDATION

We work in Calumet, Outagamie, Shawano, Waupaca and northern Winnebago counties, and partner with:

- Brillion Area Family of Funds
- Chilton Area Community Foundation
- Clintonville Area Foundation
- Shawano Area Community Foundation
- Waupaca Area Community Foundation

Why give through YOUR Community Foundation?

LOCAL EXPERTISE
- Knowledge of nonprofits and community needs
- Board members engaged in the community
- Helpful professional staff

PERSONAL SERVICE
- Effective giving
- Prudent investment management
- Grant-making made simple
- Awareness of needs of nonprofits

COMMUNITY LEADERSHIP
- Community investment
- Collaborative giving
- Nonprofits made stronger

BRIGHT IDEA FUND

Investing in Community Needs

The *Bright Idea Fund* helps to preserve the quality of life for all, forever in Calumet, Outagamie, Shawano and Waupaca counties and the Neenah-Menasha area of Winnebago county. During fiscal year 2018, grants totaling $1.1 million were awarded to charitable organizations addressing community needs related to the fund's priorities within the focus areas of:

- **Arts and Culture**
- **Community Development**
- **Nonprofit Effectiveness**
- **Basic Needs and Self-Sufficiency**
- **Environmental Sustainability**

Grants:

- **Increased access to visual and performing arts.**
- **Expanded services for children and young people around education, safety and mental health.**
- **Enhanced opportunities to experience nature and address environmental concerns.**

...and more!

The Bright Idea Fund:

- Combines gifts from generous donors who chose to have their funds work together to address community problems and opportunities. Want to join them? Contact us to learn how.
- Considers community-based data found in research such as the Fox Cities LIFE Study sponsored by the Community Foundation, United Way Fox Cities and the Fox Cities Chamber of Commerce. **FoxCitiesLifeStudy.org**
- Engages staff, board and committee volunteers representing diverse professional, personal and community backgrounds when making grant decisions.

Go to **cffoxvalley.org/BrightIdeaResults** to see grants awarded, read stories and learn how you can join generous donors who are making a difference by investing in bright ideas addressing community issues.