



# FORT ATKINSON

COMMUNITY FOUNDATION



# Impact Report 2024-2025

July 1, 2024 - June 30, 2025

204 N. Main Street  
Fort Atkinson, WI 53538

920.563.3210  
[www.fortfoundatio.org](http://www.fortfoundatio.org)



## A WORD FROM OUR CHAIRMAN

It is such a privilege to be a part of this organization and to have a front row seat to the incredible impact that local generosity can have in a community.

Over the past year, we were humbled by the support provided by 163 donors, who invested over \$1.8 million dollars in our organization. We take the trust of those (and all!) donors very seriously and are proud to be strong stewards of those dollars in supporting our vision of “A Better Fort Atkinson.”

And a better Fort Atkinson is exactly what we are helping create through that generosity. As you will see detailed throughout this report, our foundation distributed \$3,249,263 in grant support and scholarship funding in this last year alone. With community grants ranging from \$4,500 for new soccer goals, to over \$2 million towards the new BASE Building, we are here to support projects big and small that can leave a lasting, positive impact on the people who choose to live, work and play in Fort Atkinson!

It was also a year that saw some personnel changes for the organization. We said goodbye to Sue Johnson, who had diligently and passionately served on our Board of Directors for six years, and we welcomed Whitney Townsend as our newest director who is already bringing strong community energy and new ideas to our work. We were also so pleased to welcome Megan Hartwick as our new Executive Director, following the retirement of Sue Hartwick who steadfastly led our organization for 12 years. I am eager to continue working with Megan and our Board to find ways to expand our impact.

In this report, you will also find information on how you can invest in work. From our Burr Oak Legacy Society to our Donor-Advised Funds, and many options in between, FAFCF offers donors the ability to contribute in ways that feel aligned with their interests and values. We hope you'll consider joining our efforts.

It has been an honor serving as the Chairman for the Board of Directors and I look forward to all the good we will continue to do. Thank you to all who believe in our mission and who believe in creating the best Fort Atkinson possible!

### LISA CARAS

Chairman, FAFCF  
Marketing Director, Jones Dairy Farm

## 2024 Board of Directors



Standing: Robert Cassidy (Director), Bonnie Geyer (Secretary), Jim Schulenburg (Treasurer)  
Sitting: Sue Johnson (Past Chairman), Sally Koehler (Chairman), Lisa Caras (Vice Chairman)

## 2025 Board of Directors



Standing: Whitney Townsend (Director), Robert Cassidy (Secretary), Bonnie Geyer (Treasurer)  
Sitting: Sally Koehler (Past Chairman), Lisa Caras (chairman), Jim Schulenburg (Vice Chairman)

# OUR ORGANIZATION & KEY HIGHLIGHTS

## MISSION

Improving the quality of life in Fort Atkinson by inspiring and supporting enduring philanthropy.

## VISION

A Better Fort Atkinson

## CORE VALUES

We celebrate the generosity of our community. We value being a nimble, responsive organization that helps kind-hearted donors support their passions. We believe in engagement, improvement, integrity, collaboration, lifelong learning, and equal opportunity.



# \$3,249,263

## INVESTED IN OUR COMMUNITY!



**\$2,869,413**

distributed in new local grants



**\$379,850**

distributed\* in scholarships



**\$474,125**

awarded in new scholarships



**\$41.9 million**

in total assets



**88 Funds**

working in our community



**\$1,840,333**

in gifts received

*\*distributed in multi-year scholarships awarded in previous fiscal years*

# COMMUNITY IMPACT GRANTS

Community grants are the heart and soul of the support our foundation provides. Through our General Fund, Field of Interest Funds, and Donor-Advised Funds, we provide high-level, impactful support to programs, projects and organizations across Fort Atkinson. Our community grants have one core focus - to create **“A Better Fort Atkinson.”**

## \$2,710,247

### DISTRIBUTED IN COMMUNITY IMPACT GRANTS!

## HOUSING

With a critical need for housing in our community, our foundation recognized the importance of utilizing our resources and capacity more effectively in collaboration with other community/regional organizations to increase inventory and help bring more affordable housing options to Fort Atkinson.



## \$100,000

Distributed to the Homeless Coalition of Fort Atkinson (from a 2021 pledged grant) to support their work in providing transitional housing.



## \$132,000

Distributed to Habitat for Humanity of Waukesha & Jefferson Counties to support their expansion into Fort Atkinson and their first project in our community - a duplex on Schumacher Way!



## \$1,000,000

In Fall 2024, our foundation pledged \$1,000,000 in support of the Live Local Development Fund - an initiative through Thrive Economic Development aimed at promoting housing development. This collaborative effort, with pledged funds from Jefferson County, Fort Healthcare, Greater Watertown Community Health Foundation, Premier Bank, and Ixonia Bank, provides strategic gap financing designed to enhance Greater Jefferson County's competitiveness and drive housing development. Our first distribution of funds is expected to be made in Spring 2026, in support of the new 85-unit apartment complex in the Banker Road development. Interest made on this impact investment will continue to be utilized to support future housing efforts within the LLDF.

# COMMUNITY IMPACT GRANTS

## EDUCATION

In addition to our Scholarship Program and Educator Wish Grants, our foundation is proud to support other educational efforts in our school district and across our community.

# \$15,016

Distributed to the Fort Atkinson High School to support half the cost of a new automated 770M CNC Mill for the Tech Ed Department's line-up of manufacturing equipment used in their career and technical courses. This type of machine will help prepare students for a wide variety of CNC equipment at different manufacturing facilities such as Jones Dairy Farm, IPEC, NASCO, Ball Corporation, Spacesaver Corporation, HOPPE North America, and Green Bay Packaging.



# \$41,808

Pledged to the Fort Atkinson High School Marching Band for 120 new uniforms to replace the existing 30-year old uniforms.

# \$1,250

Distributed from our Community Grant Program to provide funding for the annual Ed Winiarski Turn Around Award presented to a nominated FAHS Senior, and the Wildermuth Award for Excellence in Education.

# \$2,323,200



Payments began to Badgerland After School Enrichment Program (BASE) towards their capital campaign for their new building at 1233 Janesville Avenue. Through a \$1.75 million grant from our foundation, and \$975,454 additional donations through our Non-Endowed BASE Building Fund, construction began in March 2025. A total of \$2,323,200 has been distributed to BASE through their grant and Building Fund to support the purchase of the building and construction costs. Initial Phase I construction is expected to be completed by the end of 2025.

# COMMUNITY IMPACT GRANTS

## ARTS & CULTURE

Many local organizations work passionately to keep Fort Atkinson a vibrant, beautiful city engaged in cultural and artistic activities, and we're grateful to play a small role in those efforts.

# \$9,500

Distributed to the Fort Atkinson Beautification Council (from a pledged 2023 grant) to support half the cost of their organization's Phase II mural project on the City of Fort Atkinson Water Department Building along the Rock River.

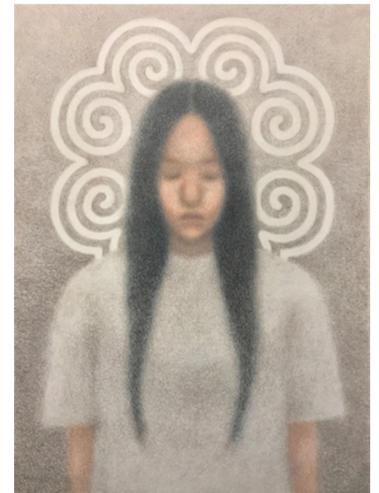


# \$10,000

Distributed to Friends of PBS Wisconsin for their work on a six-part digital series highlighting Fort Atkinson's roots in poetry - both through the life of Lorine Niedecker, as well as Fort Atkinson resident and former WI Poet Laureate, Nick Gulig.

# \$1,200

Distributed in cash prizes to the Ernie Pope Art Show student artist winners. The Ernie Pope Art Show is hosted by the School District of Fort Atkinson Art Teachers, supported by the Ernie Pope Memorial Art Fund, and celebrates the talents of dozens of local students.



Grand Prize Winner:  
"Out of Focus"  
Evanna Thao

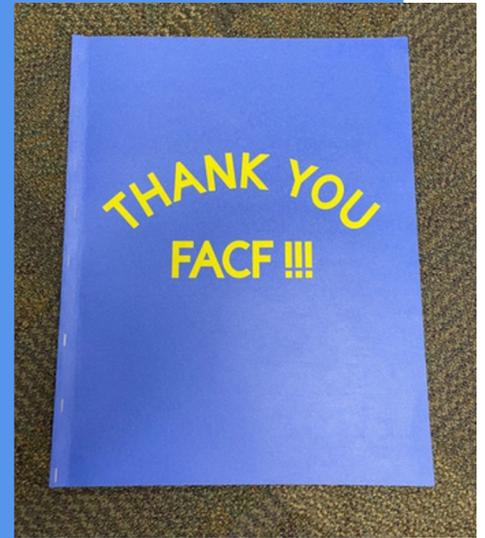
# COMMUNITY IMPACT GRANTS

## HEALTH & WELLNESS

Our mission to improve the quality of life in Fort Atkinson through philanthropy includes investing grant dollars that support programs, services and activities that encourage well-being and healthy lifestyles.

### \$4,500

Distributed to the Rockwell PTO for the purchase of one (of two) sets of soccer goals for the Rockwell playground field.



### \$20,000

Up to \$20,000 was pledged to the Fort Atkinson Parks & Recreation team in support of half the expected cost of a new batting cage project at Jones Park.



### \$7,457

Distributed from an early 2024 pledged grant for the purchase of Automated External Defibrillators (AEDs) at seven city locations.



**ROCK RIVER**  
COMMUNITY CLINIC

### \$250,000

A \$250,000 community grant was pledged in support of the Rock River Community Clinic's Capital Expansion project, which will include the creation of a fully integrated (medical, dental & behavioral) health clinic location in Johnson Creek. In 2024, RRCC served 249 dental patients and 486 medical patients from Fort Atkinson. Their services are critical to the health and wellbeing of our communities and all those who need care. We are honored to fulfill this grant distribution in early 2026.

# COMMUNITY IMPACT GRANTS

## HISTORICAL PRESERVATION

# \$96,623

Distributed to the City of Fort Atkinson for their collaborate project on the new WWII Memorial in McCoy Park. The memorial features a stainless steel globe, 4' in diameter, featuring textured continents reflecting the worldwide nature of the conflict that affected everyone, combatants



and those on the home front alike. Two benches feature the names of the two Congressional Medal of Honor recipients from Jefferson County - Gerald Endl and Kenneth Gruennert. Supported by the Mabel Schumacher Fund, City of Fort Atkinson, Parks & Recreation team, Brady Lueck, and more.

## ECONOMIC ADVANCEMENT

# \$10,000

Distributed to the Community Action Coalition of Southcentral Wisconsin for their collaborative project with Jefferson County to open the region's first Financial Empowerment Center. The FEC is a free public service that offers one-on-one financial counseling to all adults living or working in Jefferson County.



# \$16,000

Pledged to the City of Fort Atkinson, in partnership with the Chamber of Commerce and UW-Whitewater Enactus Organization, to support the BOOST Fort Atkinson storefront pitch competition.

# DESIGNATED & DONOR-ADVISED GRANTS

## \$88,590 DISTRIBUTED IN DESIGNATED GRANTS!

Our foundation holds 10 designated funds, providing an opportunity for local organizations to request funding for projects, programs, operations, etc. They also have the opportunity to take year-end distribution funding.



Fort Atkinson Club

Fort Atkinson Food Pantry

Fort Atkinson Historical Society

Fort Atkinson Senior Center

Friends of Lorine Niedecker

Friends of McCoy Park

Police Department DARE fund

Police Department K9 Unit Fund

## \$69,650 DISTRIBUTED IN DONOR-ADVISED GRANTS!

Our Donor-Advised Funds can make recommendations to our foundation's Board of Directors for funding they would like issued from their fund in support of local organizations operations, capital campaigns, projects, and more. In this fiscal year, four DAFs made requests on behalf of support for six organizations.

Negus Family Fund

Kerschensteiner Family Fund

Schafer Family Fund

Tuttle Family Fund



# EDUCATOR WISH GRANTS

Educators Wish Grants (formerly known as Classroom Teacher Wish Grants) provide small grant funding (up to \$500) to local educators to support a project, program, or needed materials/equipment for the school year. Our foundation is honored to support the learning needs and environments of our community's students.

## \$5,144

### AWARDED TO 14 LOCAL EDUCATORS!



*"Thank you again for making our classroom a **better place to learn**. We will keep working hard and learning every day, and we'll always remember your generosity."*

Mrs. Kerr's 1<sup>st</sup> Grade Friends  
Luther Elementary School

*"With these items, our classroom continues to be a **fun learning space** for kids to get wiggles out, be calm and ready, and provide options for different sensory needs during our many hours together. Thank you for this special funding to be able to incorporate fun and **sensory friendly items** for our community's littlest learners!"*

Amy Schuldt, Kindergarten  
Luther Elementary School

# SCHOLARSHIP PROGRAM

With 50 scholarship funds held at our foundation, we are able to provide incredibly impactful support on the secondary education of dozens of Fort Atkinson students each year. We are so grateful to the generous donors who invest in this robust program, giving us the privilege of investing in local education.

**\$379,850** DISTRIBUTED IN PREVIOUSLY AWARDED SCHOLARSHIPS



*“Receiving this scholarship is more than just financial support - it is an affirmation that someone believes in my dreams and wants to help me achieve them. Your kindness has not only lightened the burden of my educational expenses, but has lifted my spirits and motivated me to work even harder.”*

Alayna Riddell - 2024 FAHS graduate  
Recipient of the 2024 James Rossing Adversity & 2025 Juanita Schreiner Memorial Scholarships

**\$474,125** AWARDED IN 2025 SCHOLARSHIPS

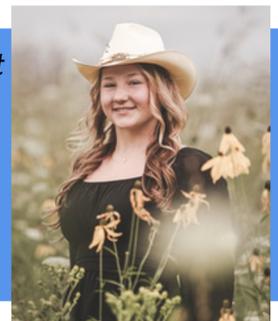
In May 2025, our foundation awarded \$474,125 across 130 scholarships to 88 total students.

FAHS Seniors: \$297,325:	73 SCHOLARSHIPS AWARDED TO 52 STUDENTS
Undergraduates: \$127,800:	41 SCHOLARSHIPS AWARDED TO 24 STUDENTS
Graduates: \$127,800:	16 SCHOLARSHIPS AWARDED TO 12 STUDENTS



*“I am extremely grateful for such generous gifts. I promise to work very hard so that one day I might be able to make a difference in another student’s life the same way the foundation has made a difference in mine.”*

Caitlyn Farrell - 2025 FAHS graduate  
Recipient of the 2025 Staller Memorial & Theodore W. Batterman Family Scholarships



# 2024-2025 FINANCIAL SUMMARY

For full audited financials, please visit our website at <https://www.fortfoundation.org/investments-financials> or scan the QR code here



<b>Assets</b>	<b>Jun 30, 2025</b>	<b>Jun 30, 2024</b>
Cash & Cash Equivalents	\$1,489,379	\$3,140,161
Investments	\$40,406,705	\$36,519,291
Pledges Receivable	\$6,000	\$18,000
Operating lease right-of-use	\$3,367	\$3,000
<b>Total Assets</b>	<b>\$41,905,451</b>	<b>\$39,692,452</b>

<b>Liabilities</b>	<b>Jun 30, 2025</b>	<b>Jun 30, 2024</b>
Grants Payable	\$2,125,160	\$321,107
Scholarships Payable	\$531,900	\$509,625
Operating Lease Liability	\$3,367	\$3,000
Scholarships Payable (long-term)	\$259,100	\$226,450
<b>Total Liabilities</b>	<b>\$2,919,527</b>	<b>\$1,060,182</b>

<b>Net Assets</b>	<b>Jun 30, 2025</b>	<b>Jun 30, 2024</b>
Without donor restriction	\$5,929,207	\$5,748,627
With donor restriction	\$33,056,717	\$32,883,643
<b>Total Net Assets</b>	<b>\$41,905,451</b>	<b>\$39,692,452</b>

*The Statement of Activities is on a cash basis for clarity of cash flow.  
The Statement of Financial position is presented on an accrual basis  
for clarity of future commitments.*

# 2024-2025 FINANCIAL SUMMARY

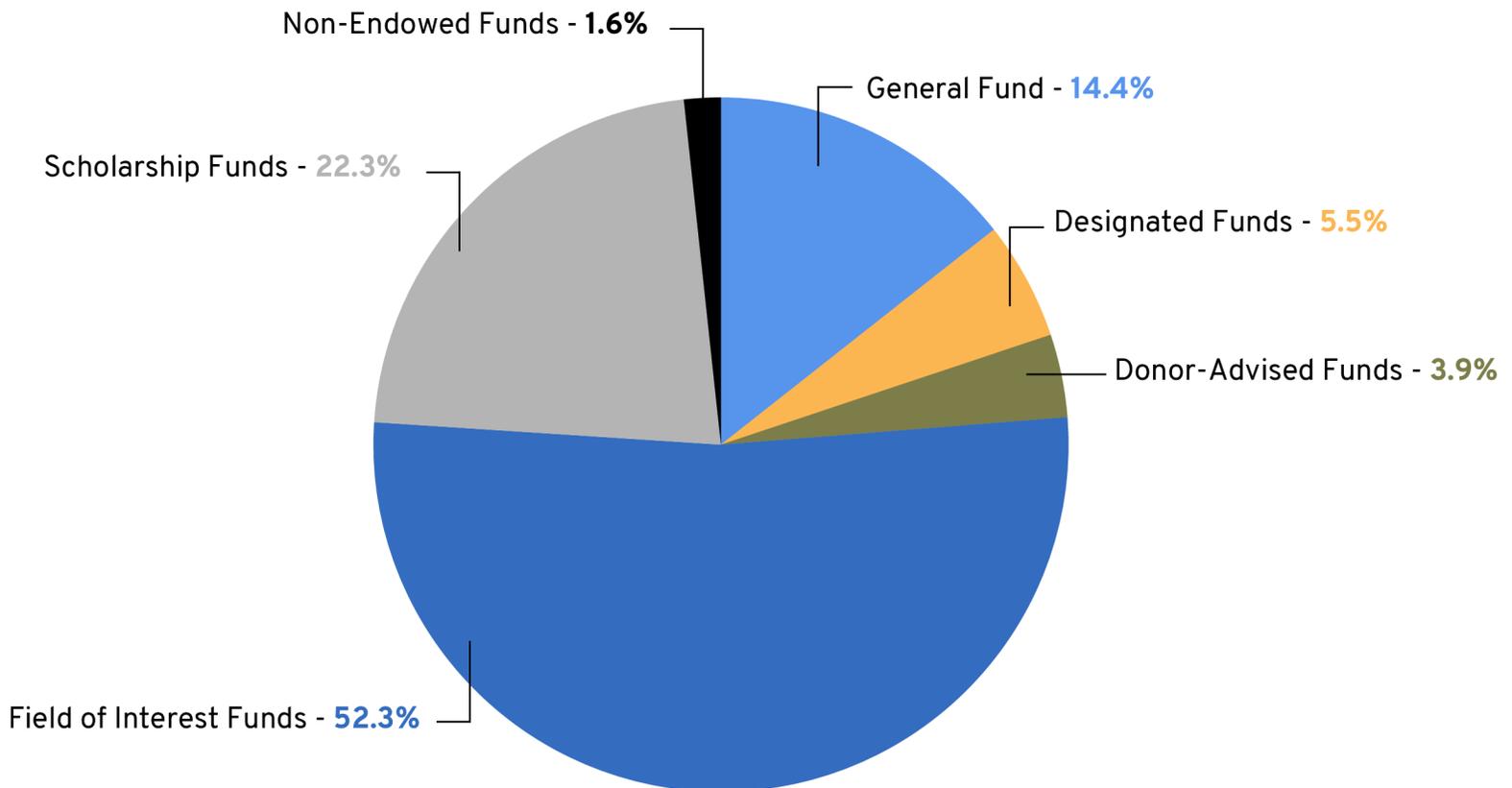
For full audited financials, please visit our website at <https://www.fortfoundation.org/investments-financials> or scan the QR code here



Revenue	Jun 30, 2025	Jun 30, 2024
Contributions	\$1,840,333	\$1,253,377
Investment return (net)	\$3,762,608	\$4,434,745
<b>Total Revenue</b>	<b>\$5,602,941</b>	<b>\$5,688,122</b>

Expenses	Jun 30, 2025	Jun 30, 2024
Grants	\$4,673,141	\$411,296
Scholarships	\$428,535	\$373,850
Administrative/Operating	\$147,611	\$166,673
<b>Total Expenses</b>	<b>\$5,249,287</b>	<b>\$951,819</b>

## ASSETS BY FUND TYPE



# FOUNDATION FUND LISTING

## General Fund

### Designated Funds:

BASE Club Fund  
BASE Community Building Fund\*  
Brietzke Educational Wetland Fund\*  
Dwight Foster Public Library Fund  
Educator Wish Grant Fund  
Fort Atkinson Club Fund  
Fort Atkinson Food Pantry Fund  
Fort Atkinson Historical Society Fund  
Fort Atkinson Parks & Recreation Fund\*  
Fort Tree Fund\*  
Friends of Haumerson's Pond Fund\*  
Friends of McCoy Park Fund\*  
Hoard Curtis Scout Camp Fund  
Kiwanis Youth Fields Fund\*  
Lorine Niedecker Fund  
Police Department DARE Fund\*  
Police Department K9 Unit Fund  
Project Lead Fund\*  
Seasonal Display Fund\*  
Senior Center Fund  
Water Tower Fund\*

### Donor-Advised Funds:

Elizabeth Jones Chisholm Fund  
Gordon F. Day Family Fund  
Hartwick Family Fund  
Kerschensteiner Family Fund  
Negus Family Fund  
Schafer Family Fund  
Vance Family Fund  
Robert J. Vincent Fund  
Tuttle Family Fund  
Ward Knox Family Fund

### Field of Interest Funds:

Beautification Fund  
Bertha & Marilyn Kuhl Fund  
Carol Liddle Fund  
Doris Highsmith Social Services Fund  
Mabel Schumacher Fund  
Mary C. Hoard Fund  
Phyllis & Bob Ziemen Fund  
Pope Memorial Art Fund

## NEW FUNDS

We are grateful to the donors and advisors who opened new funds with our foundation this year:

- **Don Gruber Memorial Athletic Scholarship Fund**
  - *Established July 2024*
- **Hartwick Family Donor-Advised Fund**
  - *Established January 2025*
- **Kiwanis Youth Fields Non-Endowed Designated Fund**
  - *Established April 2025*
- **Brietzke Educational Wetland Non-Endowed Designated Fund**
  - *Established June 2025*

### Scholarship Funds:

AAUW Grants for Gals Fund  
AAUW Second Chance Fund  
Ardell Wiederhoeft Legacy Fund  
Barrie School Fund\*  
Ben & Ada Hake Agriculture Fund  
Denice Jones Medical Fields Fund  
Don Gruber Memorial Athletic Fund  
Dr. Jim & Therese Fitzpatrick Educator Fund  
Dr. James Russell Athletic Fund  
Dr. Sydney H. Weidemann Fund  
Ed Karrels Computer Science Fund\*  
Eileen Harrison Education Fund  
Fireside Theatre Fund  
FA Thrift Shop/Jean Reich Memorial Fund  
Fred & Helen Rose Inspire-a-Dream Fund  
Gary & Bonnie Hamm Fund  
Gene Halker Memorial Fund

Hannah Church Memorial Fund  
Isabelle Matthews Education Fund  
Jake Meinert Memorial Fund\*  
James & Frances Luther Fund  
James Rossing Adversity Fund  
Jane Knox AAUW Fund  
Jason Dahnert Memorial Fund  
Jerome Hake Engineering Fund  
Jim & Lee Vance Fund  
Jones Dairy Farm Industrial & Culinary Fund  
Juanita Schreiner Memorial Fund  
Kathleen Grabill Thorndike Fund  
Lloyd Hake Endowed Fund  
Lloyd Hake Fund\*  
Luther School Fund\*  
Make a Difference Fund  
Maurice & Clara Staller Fund

Medical Careers Fund  
Orrin & Margaret Bull Family Fund  
Pay It Forward Fund  
Phyllis Ziemen Fund  
Purdy School Fund\*  
Ralph & Clara Rutledge Memorial Fund  
Richard Noel Bingham Memorial Fund  
Robert & Judith Knapp Fund  
Rockwell School Fund\*  
Science Matters Fund  
Terry Beck Protective Services Fund  
Theodore W. Batterman Family Fund  
V.C. & Blanche Helgren Martin Fund  
Victor & Ruth Johnson Fund  
Wallace Scouting Fund  
Walter & Louise Buell Fund

\*Denotes a Non-Endowed Fund

# YOUR PATH TO LOCAL IMPACT!

At the Fort Atkinson Community Foundation, we pride ourselves on our strong donor stewardship. We take the time to listen to our donors and learn about what is most important to them - what inspires them - so we can best connect them to investment opportunities that will align with their values and desired impact.

As your local partner, we help you give wisely, ensuring your investments will have a lasting, local impact!

## How can you give?



## Where can you give?

### GENERAL FUND:

Support our only unrestricted fund and the source of grant support for applications that do not fit one of our field of interest funds! Our General Fund is critical to maintaining our status as a community foundation.

### DESIGNATED FUND:

Support a local nonprofit organization/community project through a contribution to a designated fund.

*Minimum to establish: \$15,000 (endowed), \$1,000 (non-endowed)*

### DONOR-ADVISED FUND:

Play a role in your giving! A tax-smart way to recommend grants to projects/organizations you care about.

*Minimum to establish: \$15,000 (endowed)*

### FIELD OF INTEREST FUND:

Identify areas of interest that are meaningful to you and rely on the FACF Board of Directors to fund projects aligned with those focuses/causes.

*Minimum to establish: \$15,000 (endowed)*

### SCHOLARSHIP FUND:

Support education through financial assistance to local students based on specific criteria and requirements you help structure along with FACF staff.

*Minimum to establish: \$20,000 (endowed)*

### ACORN FUND:

Make a small investment today and have five years to meet the required threshold for your fund to become a mature endowed fund type based on your philanthropic interests.

*Minimum to establish: \$1,500 (non-endowed)*

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**There is NO minimum contribution required for donations made to existing funds. All investments are impactful, appreciated, and help create “A Better Fort Atkinson.”**

# OUR GRATITUDE

We were the recipients of incredibly generous investments from 163 community members this past year. We are humbled by the support and take our role as stewards of those dollars very seriously. We are thankful to those who believe in our work and seek to join us in creating “A Better Fort Atkinson.”

## Bur Oak Legacy Society

Thank you to the donors who have bequeathed a gift to the Fort Atkinson Community Foundation in their will, trust or estate plan.

Theodore & Marilyn Batterman\* – Ellen Bogner – Doug & Marianna Dexter\*  
Sue & Jude Hartwick – Barbara Rohland – Helen Rose – Mabel Schumacher  
Verna June Simpson\* – John G. Slater\* – Jim & Lee Vance\* – Janice Zastrow\*

*\*denotes bequest realized*

Earlier this year, Sue Hartwick retired from the foundation, having served for 12 years, as a Program Administrator and then the Executive Director. The foundation saw significant growth during her tenure and provided critical, high-level support for dozens of impactful community projects and programming. Sue brought her passion for the Fort Atkinson Community to her position every day, and played a key role in propelling our foundation into the strong community partner and funder it is today. Thankyou for all your years and hard work, Sue!



Megan Hartwick  
Executive Director

I was honored to have been hired as the new Executive Director of the Fort Atkinson Community Foundation in January 2025. I grew up in Fort Atkinson and returned to the community 14 years ago, and am now raising my family here. I have always been amazed by the generosity of this community and its willingness to connect and collaborate to make great things happen.

And here at the Fort Atkinson Community Foundation, we have the honor of doing that every day - helping make great things happen in this city, for all who live, work, and play here.

As we look ahead, and have some ambitious plans and big ideas! I look forward to continuing to work with our community partners, residents, organizations, business leaders, and incredible Board of Directors to further our work to improve the quality of life in Fort Atkinson by inspiring and supporting enduring philanthropy.

It is a privilege to serve this community!

With gratitude,

*Megan*

## Connect with us!

facf@fortfoundation.org – 920.563.3210 – www.fortfoundation.org

