Philanthropy in Action

THE POWER OF PARTNERSHIPS



GREATER MILWAUKEE FOUNDATION

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PANNUAL REPORT

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We have become a partner of choice for those looking to get involved in their community and give back.

LETTER FROM THE BOARD CHAIR AND PRESIDENT & CEO

No single person or organization is responsible for building our greater Milwaukee community into what it is today. Nor will one individual or entity be able to tackle the challenges or solve the issues that confront it.

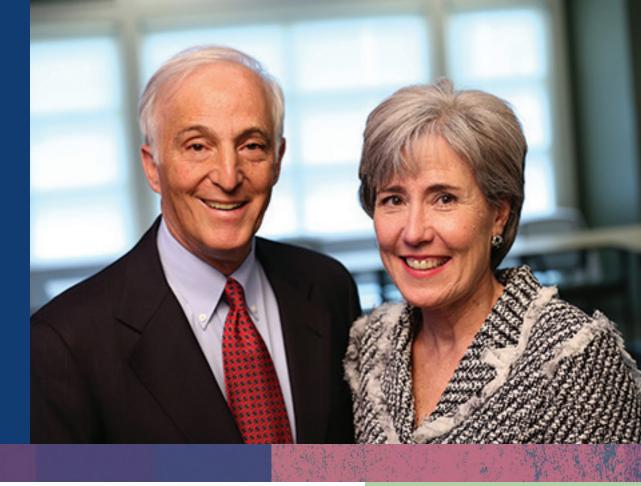
But together we can.

By collectively working together, our potential for change becomes greater. That's the idea behind this year's annual report. The theme reflects something we've known for years and that epitomizes our work as a community foundation. Philanthropy is not just about an exchange of money or time. It is about working together to improve conditions and communities. When you think about it, the power created by these partnerships represents philanthropy in action. Partnerships we forge help transform challenges into opportunities. Take for example issues like hunger and homelessness. We cannot solve them overnight, but we can raise awareness and support for agencies that serve as lifelines for neighbors in need. We did so in 2014 through Match Day, our online giving event.

Strengthening our city's educational system is another issue many have been working on for years. By building trust across sectors and leveraging resources – which we have done since 2011 in organizing Milwaukee Succeeds – we are developing strategies to create change and already are seeing progress.

We have a stake in improving the quality of life in our region on behalf of and in partnership with our donors. In 2014, our Civic Engagement staff partnered with nonprofits, donors and policymakers to explore such important regional issues as the state of foreclosures and the future of transit. In the fall we worked closely with Gov. Scott Walker's staff to examine the impact that state budget matters will have on families in our area.

We also engaged donors, partners, and community leaders to explore the roles we can play in promoting greater racial equity and inclusion in our region. Their input and guidance led us to conclude we can make significant contributions toward building a more equitable region of welcoming and inclusive communities that provide opportunity, prosperity and a high quality of life for all. During late 2014, we embarked on internal and external



work to prepare for engaging in this vital area.

Because we have a finger on the pulse of the community and nearly a century of history behind us, we have become a partner of choice for those looking to get involved in their community and give back. In this report, you'll read about a number of them – including former Sen. Herb Kohl, who chose the Foundation to be the steward of what is the largest gift in our history.

Partnerships do not come without their share of challenges. A little bit

homes L. Spero

Thomas L. Spero, Board Chair

of compromise and a lot of patience is required. A learning curve often is involved. But in the end, beautiful things can happen. Our profiles on the Community Connections Small Grants Program, Black Arts Think Tank and Three Bridges Park are just a few examples of that in our community.

We are created by and for the community and are honored to be able to collaborate with so many people on inspiring philanthropy, serving donors and strengthening our community, now and for future generations.

Ellen M. Gilligan, President & CEO

When you think about it, the power created by these partnerships represents philanthropy in action.

YEAR IN REVIEW

Assets	\$841,014,364
Gifts	\$139,914,112
Grants	\$34,926,333
Total # of funds	1,236
Total # of grants	3,842
Total # of agencies supported	1,304

OVERALL GRANTMAKING BY PROGRAM AREA

Through the substantial resources entrusted to us by our donors, we can improve lives and make a difference in the community in a wide variety of areas. The chart below reflects both Foundation-directed and donor-recommended grants.



* Includes religious institutions, world peace, public affairs, philanthropy/volunteer, civil rights, awards and disaster relief



2015 Civic Award winners: Lincoln Fowler, Ward Fowler, Paul Miller, Leon Janssen and Christopher Boston

CELEBRATING CIVIC VOLUNTEERS

We honored five passionate and committed individuals in 2014 with our three civic awards. Leon Janssen, a 34-year veteran of GE Healthcare, received the William C. Frye Award for his years of thoughtful volunteer service in the community. Janssen's volunteer work has focused on education and increasing opportunities for area youth with such entities as SaintA, Milwaukee Symphony Orchestra and the former United Way of Waukesha County.

The trio that fueled the start of Colectivo Coffee – Lincoln Fowler, Ward Fowler and Paul Miller – was honored with our Frank Kirkpatrick Award because of the significant physical improvements their stylish cafes have made in several Milwaukee neighborhoods. The company owners also are well-known for their contributions to the area's vibrancy, particularly through supporting performing arts, environment and social advocacy nonprofits.

Community organizer Christopher Boston was named the Doug Jansson Leadership Award recipient for his efforts to improve the quality of life in Milwaukee neighborhoods. He has done so through his position as director of sustainable communities for LISC Milwaukee as well as his role as pastor at Lamb of God Missionary Baptist Church.

YEAR IN REVIEW

MILWAUKEE SUCCEEDS

The result of the hard work of hundreds of groups and individuals across the city involved in Milwaukee Succeeds is starting to show, according to benchmarks that the communitywide educational partnership is tracking. Eight of 11 educational benchmarks are moving in a positive direction for the second consecutive year.

The partnership, of which the Foundation is a founding organizer, continues its work toward researching, piloting and implementing educational strategies across the cradle-to-career spectrum to benefit children and students in Milwaukee. In 2014, it launched a pilot program, with funding from the Foundation and United Way of Greater Milwaukee and Waukesha County, to help improve ratings of 12 child care centers in high-density areas of Milwaukee. In addition to providing consultation, the pilot works with center staff to obtain necessary postsecondary education credits.

Milwaukee Succeeds also launched an evidence-based coaching initiative called transformative reading instruction, which uses evidencebased coaching for teachers along with tutoring, parent engagement workshops and experiential learning opportunities to help improve third grade reading outcomes. More info on the partnership's progress can be found at www.milwaukeesucceeds.org.



Gregory S. Marcus



Paul J. Jones



Cecelia Gore

NEW BOARD MEMBERS

Three community leaders with deep roots in the greater Milwaukee area joined our Board in the summer of 2014. Gregory S. Marcus, president and CEO of The Marcus Corporation, Paul J. Jones, vice president, general counsel and secretary of Harley-Davidson Inc., and Cecelia Gore, executive director of the Brewers Community Foundation, each began three-year terms. Thomas L. Spero, a 9-year Board member and retired managing partner of the Milwaukee office of Deloitte & Touche LLP, succeeded Peter W. Bruce as chair.

MATCH DAY

More than 5,200 people opened their hearts and wallets and raised more than \$3 million for 20 food and shelter agencies in southeastern Wisconsin as part of the Greater Milwaukee Foundation's Match Day event. Foundation donors alone contributed more than \$360,000. All gifts and grants were amplified by a \$750,800 match pool that was built up by generous donors and community supporters including the Brewers Community Foundation, Ceres Foundation, Faye McBeath Foundation and United Way of Greater Milwaukee and Waukesha County.

5,233 online donors

\$750,800 match pool

More than \$3 million raised

DONOR HIGHLIGHTS

Forty-seven new partnerships in philanthropy began at the Greater Milwaukee Foundation in 2014. These individuals, families, nonprofits and other organizations chose us to help steward their legacies because they know that we, as a community foundation, are made to last and built to be an engine for change. They also know that by being part of the Foundation, together we can create opportunity for a greater number of people and truly make our community stronger.

FOUNDATION FUNDS

County*	New funds	Total funds	Total assets
Milwaukee	27	778	\$634,461,059
Ozaukee	6	133	\$59,612,769
Washington	4	56	\$50,758,743
Waukesha	10	197	\$73,111,849
Other		72	\$23,069,944
Total	47	1,236	\$841,014,364

* Represents county of the donor who establishes the fund

DONOR RECOMMENDED GRANTS

Each fund in our family of more than 1,200 charitable funds has a specific purpose that it fulfills annually through its grantmaking. The information in this section reflects funding made through supporting organizations, donor advised, designated and agency endowment funds.

Total **\$26,277,943**

Total # of agencies supported

1,243

Total # of grants awarded

3,545

DONOR RECOMMENDED GRANTMAKING BY PROGRAM AREA



* Includes religious institutions, world peace, public affairs, philanthropy/volunteer, civil rights, awards and disaster relief

ACORN FUNDS*

Through the Acorn Fund program, created by the Greater Milwaukee Foundation nearly a quarter of a century ago, people of modest means and all ages have the opportunity to make a big difference a little at a time. With these funds, individuals can make regular monthly contributions of as little as \$100 until the fund grows to grantmaking size.

Total # of new funds	5
Total # of funds	135
Total market value of assets	\$7,711,314
New Funds Brandt-Johnson Family Fund	

Brandt-Johnson Family Fund Milwaukee Community Sailing Center Legacy Fund SHARP Literacy Inc. Endowment Fund St. Mark's Episcopal Church Milwaukee Fund Greg & Jodi Wait Charitable Fund

*These are reflected in other fund types



NEW FUND HIGHLIGHT

St. Mark's Episcopal Church Milwaukee Fund

In 1912, a year after the picturesque limestone building was built for St. Mark's Episcopal Church on Milwaukee's east side, its rector declared: "The new church will stand as long as Milwaukee itself will endure and nothing short of an earthquake will blot it out."

The building resembles a small English country church and, while built to last, it's aging. Beyond the stone walls and English Gothic-style glass windows, a congregation of more than 200 parishioners deeply committed to their faith and community depends on its remaining intact. The Acorn fund the parish created in 2014 represents a commitment toward making that happen.

The fund is designed to provide for major capital expenses. The parish had reserved funds before, but never a true endowment, and was looking for a financial vehicle built for growth. An anonymous stock gift and memorial gifts in honor of a beloved parishioner have contributed to a six-fold growth of the fund, which is close to grantmaking size.

AGENCY ENDOWMENT FUNDS

Agency endowment funds provide nonprofits with a permanent funding source that helps meet their long-term goals. Once established, these funds generate a steady source of income distributed quarterly for operating expenses or special needs.

Total # of new funds	7	
Total # of funds	108	
Total market value of assets	\$31,533,404	

New Funds

BCF Scholarship Endowment Fund Center for Communication, Hearing & Deafness Endowment Fund Milwaukee Community Sailing Center Legacy Fund MNP Inc. Fund Ozaukee Family Services Endowment Fund SHARP Literacy Inc. Endowment Fund Three Bridges Park Fund



NEW FUND HIGHLIGHT

Ozaukee Family Services Endowment Fund

Helping families succeed.

Since 1974, that's been at the heart of Ozaukee Family Services' work. Through family education, counseling, prevention and senior services, the nonprofit has helped thousands of families do just that.

It's known as a positive place where the community can turn to for help. Students learn about Internet safety and healthy lifestyles. Seniors get an extra hand with errands and chores. Kids who experience trauma can heal through counseling or a support group. Parents receive tips on everything from potty training to how to co-parent after a divorce.

The nonprofit has grown and changed over time to reflect the community's needs and its agency endowment serves as a way to ensure it can continue to be that rock of stability for the foreseeable future. Photo: Home visits through the Parents as Teachers program is one of many services Ozaukee Family Services provides to the community.

DESIGNATED FUNDS

With a designated fund, individuals are given the opportunity to select specific organizations to receive a regular annual grant. The Foundation makes sure the grants remain relevant over time and respond to changing circumstances.

Total # of new funds	4
Total # of funds	233
Total market value of assets	\$240,741,309

New Funds

KPG Charitable Fund Judith and Arthur Saltzstein Fund St. Mark's Episcopal Church Milwaukee Fund Five O's Burchardt Fund

NEW FUND HIGHLIGHT

KPG Charitable Fund

Private businessman. Public servant. Passionate philanthropist.

Those terms sum up longstanding roles 80-year-old Herb Kohl has taken on over his lifetime. One thing they have in common: a steadfast devotion to Milwaukee, the city he has always called home and Wisconsin, the state he has proudly served.

During his career – which has included leading his family's food and department store businesses and representing Wisconsin in the U.S. Senate – Kohl served as an ardent Brew City ambassador and cheerleader. He was one of the original investors in the Milwaukee Brewers and saved the Milwaukee Bucks by buying that franchise in 1985. Though he decided to sell the team in 2013, he pledged money to replace its aging arena.

He selected the Greater Milwaukee Foundation as steward of his \$100 million commitment and directed that money from his designated fund be dedicated toward a future arena entity. The gift is the largest the Foundation has received in its history.

DONOR ADVISED FUNDS

Individuals who seek active involvement in their grantmaking and prefer a low-cost alternative to a private foundation often choose donor advised funds. Each year, a donor can make grant recommendations to support their favorite nonprofits, either locally, nationally or around the world. They also can involve family in their giving by naming them as successor advisers to the fund.

Total # of new funds

Total # of funds

25

531

Total market

value of assets

\$259,264,074

New Funds

Aurora Health Care Better Together Fund Brandt-Johnson Family Fund Community of St. Mary Western Province Represented by Sister Mary Paula Bush Fund H. Copeland and Claire P. Green Fund David Michael Darrow Memorial Fund David and Goliath Fund Faye McBeath Foundation Fund Haydon Family Opportunity Fund Susan and Howard Hopwood Fund Humber Family Fund Thomas and Debora Jansen Fund Linden Fund Meehan Family Legacy Fund John and Brigid Miller Fund Milwaukee Succeeds & MPS FRF Coaching Pilot Expansion Fund Mulligan Fund Partners for Places Professional Dimensions Charitable Legacy Fund Autumn Radtke Fund Schoonenberg Family Foundation Fund Maureen and Gary Shebesta Fund Greg & Jodi Wait Charitable Fund What If? Fund Allan C. Kieckhafer Charitable Fund Rick and Gayle Steiner Charitable Foundation Fund-Sharing God's Love



NEW FUND HIGHLIGHT

Aurora Health Care Better Together Fund

The Aurora Health Care Better Together Fund represents a \$10 million commitment by Aurora Health Care to improve access to health care and wellness programs among underserved populations. Expanding primary care and behavioral health services is a key priority for the health care system, which serves 30 counties and 90 communities throughout eastern Wisconsin and northern Illinois. The donor advised fund will specifically strengthen the capacity of federally qualified community health centers and free clinics. It also is designed to enhance sexual assault and domestic violence prevention and treatment programs at colleges and universities as well as those provided by community-based advocacy organizations. Photo: Simon Myrick consults with Kirsten Gaskin, CNP, about his diabetes. Gaskin manages City on a Hill's free health clinic, which received a grant to expand its community outreach and diabetic self-management education program.

FIELD OF INTEREST FUNDS

Field of interest funds give donors the ability to support the causes they are most passionate about or focus on a specific geographic area without designating a particular agency.

Total # of new funds	7
Total # of funds	156
Total market value of assets	\$164,470,069

New Funds

Willis W. and Marilyn J. Gardner Fund (2 funds)* Ellsworth Bartlett and Jessie-Margaret McCurry McCown Memorial Trust Fund Grace G. Horn Fund Harold R. Strauss and Patricia S. Goldreich Fund Racial Equity & Inclusion Fund Judith and Arthur Saltzstein Fund

*Some donors established multiple funds



NEW FUND HIGHLIGHT

Willis W. and Marilyn J. Gardner Fund

Willis and Marilyn Gardner were Illinois natives, born in the tiny town of Monmouth, but the bulk of Willis' career and their 60-year marriage were spent in Waukesha County. Their field of interest funds give back to that community where they built careers, a family and a home.

A portion of the fund is earmarked for educational programs and other priorities in Waukesha County while the remainder supports priorities in Milwaukee, Ozaukee and Washington counties.

Marilyn, a former librarian, was an avid reader and had a lifelong appreciation for history. Willis, a mechanical engineer, developed 24 patents over his career, 38 years of which were spent at Waukesha Bearings Corp. The couple, 44-year members of First United Methodist Church of Waukesha, both passed away in 2013. Photo: A grant from the Gardner Fund supported the Milwaukee Youth Symphony Orchestra's music education and skill development initiative in Waukesha's Blair Elementary School.

SCHOLARSHIP FUNDS

Through a scholarship fund, a donor can help provide educational opportunities for tomorrow's leaders by providing one-time or multi-year support.

Total # of new funds	1
Total # of funds	108
Total market value of assets	\$60,180,377

New Fund

Richard and Kay Ross Scholarship Fund



NEW FUND HIGHLIGHT



Richard and Kay Ross Scholarship Fund

Until disbanding last year, The Exchange Club of Milwaukee was one of the area's oldest service clubs. Its members devoted time and effort toward tackling issues like crime prevention and the prevention of child abuse.

It had a longstanding relationship with Project STAY, an alternative Milwaukee public school that addresses the needs of students at risk of dropping out. Following the untimely death in 2000 of past president, Richard Ross, the club created a scholarship in his honor to provide educational opportunities for students who stay in school and graduate. Ross, North Shore Bank's vice president of marketing for nearly 18 years, and his wife, Kay, also a marketing professional, met later in life and had no children. When she died in 2009, she left a significant amount of money to the scholarship.

The club turned to the Greater Milwaukee Foundation to continue the program after it disbanded. The Richard and Kay Ross Scholarship Fund provides assistance to qualifying graduates as they pursue degrees at a twoor four-year community college, technical school or university.

UNRESTRICTED FUNDS

Unrestricted funds give the Foundation's Board full discretion as to where grants should be made in order to respond to the greatest needs within Milwaukee, Ozaukee, Waukesha, and Washington counties.

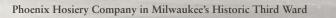
Total # of
new funds3Total #
of funds100Total market
value of assets\$84,824,495

New Funds

Louella E. Farber Fund

Willis W. and Marilyn J. Gardner Fund (2 funds)*

*Some donors established multiple funds



NEW FUND HIGHLIGHT



Louella E. Farber Fund

Louella E. Farber lived very simply but often gave of herself in abundance.

The Milwaukee native, an expert seamstress who once worked at a Third Ward hosiery factory, spent many years as a devoted caregiver to her husband Gregory, who became sick at a young age. After his death in 1975, she dedicated herself toward caring for her aunt.

Farber moved into Cedarburg's Lasata Senior Center

when her health began to fail and resided there until she died in 2014 at age 98. While typically keeping to herself, from time to time Farber dispensed tips on everything from finance to cooking. Each year, on her birthday, she splurged and bought each resident a chocolate and vanilla petit four in celebration.

Her caring spirit will live on through her unrestricted fund, which supports the Milwaukee metro area's greatest needs.

WALNUT WAY CENTER

Did you know the Walnut Way Center is a place to learn about neighborhood history?

Neighborhood elders shared their stories and experiences through ethnographic interviews (interviews that systematically describe cultur experiences). Their oral narratives are archived in the Walnut Way Neighborhood History Room.

The Walnust Way Center is a place for neighborhood-based teaching and learning through programs, events, and tours. Neighbors and friends earlier here to collectively plan and work for the common good.

FUND NAME: WILLIAM C. AND CHRISTIE A. KRUGLER FUND TYPE: DONOR ADVISED CREATED: DECEMBER 2012

FUND PURPOSE: TO SUPPORT AND CELEBRATE ORGANIZATIONS THAT ARE HELPING STRENGTHEN MILWAUKEE

Partners in life, philanthropy, building a better Milwaukee

For more than two decades Bill Krugler was in the business of investing money as managing director at Mason Wells, a private equity investment firm in Milwaukee.

He dedicated a lot of time to his career over the years, which also involved management positions at Arthur Andersen and M&I Capital Markets Group, and it provided he and his wife, Christie, with a firm financial foundation on which to build a family.

But a few years ago he became more interested in a different kind of investment that would involve more of his time and that of his whole family – giving back to Milwaukee. He retired in 2011 and a year later he and Christie created a donor advised fund at the Greater Milwaukee Foundation.

"We, as a family, were blessed financially beyond what we ever expected," Krugler said. "Knowing we are both involved in the city, it really resonated that here we have a community foundation that is in business basically to make a difference in Milwaukee. The goals of the Foundation and what we wanted to do were very much aligned."

Their relationship with the Foundation is fresh but their path toward philanthropy was paved a long time ago. Bill credits his faith community for exposing him to the concept of service. Christie traces her desire to give back to her involvement in her college sorority.

Through their involvement in their church, Fox Point Lutheran, they became familiar with nonprofits like The Gathering, a meal program, and Serenity Inns, a transitional living program for homeless men struggling with addiction. As they became more involved, they also brought their sons, Jeff, Jack and Andy, to volunteer.

"We've always been pretty charitable and thoughtful as to what we wanted to do when we had the ability to do it," Bill said. "We wanted to get them exposed to the fact that there are a lot of people who aren't as fortunate as we have been as a family."

Their philanthropy started with a financial commitment and over the years has grown into more hands-on involvement. Their fund supports those agencies to which they are deeply connected.

While they share a set of common interests, they also have their own philanthropic passions. Christie is an ardent cheerleader for 88.9 Radio Milwaukee and PEARLS for Teen Girls, where she serves on its development committee and board. Beyond his involvement on the advisory boards of Serenity Inns and Walnut Way, Bill's passions lie in economic and workforce development. He started Jobs Work, a nonprofit that he says takes a business approach to tackling poverty in Milwaukee.

The majority of the nonprofit's work revolves around helping chronically unemployed individuals obtain skills, training and intensive support needed to obtain and maintain a job. It also works with smaller central city organizations, like Walnut Way's Blue Skies Landscaping, to grow their businesses by securing contracts with large anchor institutions in the city.

While not lacking ideas for what to support through their fund, Christie said they enjoy the Foundation exposing them to new ideas. They also look forward to involving their sons more in the grantmaking and took their first step last Thanksgiving by holding a family meeting at the Foundation.

While their sons' passions might be different than their own, Christie said they hope they understand the importance of giving back.

"I think they are definitely getting the message by what we are doing," she said.



FUND NAME: THREE BRIDGES PARK FUND TYPE: AGENCY ENDOWMENT CREATED: NOVEMBER 2014

FUND PURPOSE:

To support the long-term maintenance and stewardship needs of Three Bridges Park, a 24-acre park in Milwaukee's Menomonee Valley

Passion, persistence and partnerships pave the way for Three Bridges Park

Whether it's the paved trails that wind around sculpted rolling hills or the small oaks that are growing into mighty giants or the stunning views of Milwaukee's skyline, beauty awaits you at every corner of Three Bridges Park, a 24-acre urban oasis in the Menomonee Valley.

Just as beautiful as the park itself are the partnerships it took to transform piles of dirt and rubble into one of Milwaukee's newest destinations.

"It shows that if you get the right stakeholders at the table, you can literally move hills," said Dave Misky, Redevelopment Authority of the City of Milwaukee's assistant executive director. "We did."

On paper, nine entities made up the partnership that created the park, a project more than a decade in the making that celebrated its first anniversary in 2014. In reality, more than 400 people were involved in the evolution of the brownfield-turned green space, with contributions ranging from planning to planting to pledging money.

The park sprang forth from a national design competition in 2002 spearheaded by the city, Sixteenth Street Community Health Center and Menomonee Valley Partners. The Urban Ecology Center, departments of Transportation and Natural Resources and others later came on board to bring it to life.

The project's scope, scale and magnitude pushed each partner beyond their comfort levels, said Corey Zetts, MVP's executive director. MVP never managed a major capital campaign. The city was not in the park business. DOT managed construction of roads, not green spaces. However, each brought different strengths and backgrounds that contributed to the project's success, Misky said.

"If we were missing any one piece, the project would have suffered because each voice was so valuable," Zetts said.

Zetts said that despite the park's long gestational period, which included a recession midway through, it wasn't hard to keep the momentum going because of the community's engagement and excitement.

The work didn't end once the park opened. Each partner agreed to certain responsibilities to maintain the park and all remain committed to ensuring it will exist in perpetuity. An endowment was seen as a critical piece needed to fullfill that goal and all signs pointed to the Foundation for multiple reasons, Zetts said.

"Not only do its investments perform really well, but it just felt like the right place for trying to create something that is leaving a lasting legacy to the community," she said.

Plans call for growing the fund to \$1.75 million and using it to purchase additional natural resources as well as park amenities.

Zetts still gets goosebumps, especially when she hears about or sees others benefit from the park.

"In 20 years, some kid is going to say 'No way was this a rail yard! This has always been a park," she said. "I hear a lot of people who feel like seeing that transformation makes them really hopeful. If Milwaukee can do this, then really what can't we do?"

IN MEMORIAM

In 2014, we lost 25 friends and donors to the Greater Milwaukee Foundation. They came from different backgrounds and had different passions in life, but all shared a tremendous love of philanthropy and their community. We are incredibly grateful for the time that we had to spend with them, learn from them and help them in creating their legacies.

Stephen Atwell Ned W. Bechthold Bruce C. Brown Charles P. Brumder James H. Castle Doris Hersh Chortek John W. Ethington, CFP Mary Franke Audrey E. Grove

Shirley F. Gyzinski Melita Lane Harkness Mary M. Henszey Ruth Huber Roger B. Johnston Joe L. Kennedy Sr. Gae Lach Charlotte Lehman Richard H. Leonard E. Bartlett McCown Kenneth Pike William L. Randall Judith J. Saltzstein Mary Ann Shane Tom Snyder Polly H. Van Dyke



LEGACY SOCIETY

Creating a personal, permanent and powerful legacy begins with a plan. More than 650 individuals in our community have decided to partner with us over the years in making sure their charitable legacy is a long lasting one. Many choose to give after they are gone but work on the details during their lifetime by including the Greater Milwaukee Foundation in their estate planning, weaving us into their will or leaving a gift to us through a life insurance policy, charitable gift annuity or individual retirement plan.

NEW MEMBERS IN 2014

Russell L. Augustin and Susan M. Petre Cissy V.D. Bryson Carlo DeSando III and Ellen M. Gilligan Doug and Tracy Marconnet Ann H. McIntyre Michael Montaba and Harriet Zale Patricia and John Mueller Joel R. Rossmann and Donna I. Zewen-Rossmann Richard and Suzanne Pieper Sr. Michael and Sandra Posner Gary and Ann Sanderson Georgine Schulze Norma Shogren Daniel R. Siegel Mary J. Skrentny Greg and Jodi Wait

\$462.3 million

Total amount in planned gifts expected from Legacy Society members

14

Total # of new documented bequests in 2014

26

Total # of new Legacy Society members in 2014

\$14.9 million

Total amount in planned gifts promised by new Legacy Society members in 2014

652

Total # of people who are members of our Legacy Society

SUPPORTING ORGANIZATIONS

A supporting organization provides donors with the same level of involvement as a donor advised fund, but allows for greater visibility and individuality. It is a separate entity with its own board of directors, though affiliated with the Foundation. The Foundation provides administrative, operational, investment and grantmaking support.

Total # of funds

6

Total market value of assets

\$63,812,104

Greater Cedarburg Foundation, Inc. Hepburn "Bootstrap" Foundation, Inc. Honkamp Family Foundation Oconomowoc Area Foundation Inc. Strattec Foundation, Inc. West Bend Community Foundation, Inc.

PARTNER FOUNDATIONS

We are proud to be able to work with donors and nonprofits in our four-county area to further the growth and development of those communities and to meet their most pressing needs. One of the ways in which we do so is through our partner foundations in Ozaukee, Washington and Waukesha counties. Each is led by a local advisory board that provides development and grantmaking oversight. We provide the necessary administrative support as well as sound investment expertise to help these entities further nurture the growth of philanthropy in their communities.

Total # **74** of funds

Total assets within the partner foundations

\$57,060,290



2014 grant recipients with Foundation President Peg Edquist

GREATER CEDARBURG

The Greater Cedarburg Foundation's mission is to promote and encourage private funding in support of projects and programs that enrich the quality of life for the residents of the Greater Cedarburg community.

Total assets: **\$3,726,572** Total # of funds: **12** Total # of grants made: **45** Total amount of grants made: **\$100,170**



Lake Area Free Clinic

OCONOMOWOC AREA FOUNDATION

The Oconomowoc Area Foundation's mission is to enrich the community economically and culturally, care for children, help those in need, develop youth and protect the environment.

Total assets: **\$8,958,789** Total # of funds: **24** Total # of grants made: **73**

Total amount of grants made: \$410,126



Museum of Wisconsin Art

WEST BEND COMMUNITY FOUNDATION

The West Bend Community Foundation is a permanent charitable endowment which inspires, encourages and supports enduring donor legacies for the betterment of the greater West Bend community.

Total assets: \$44,374,929

Total # of funds: 38

Total # of grants made: 328

Total amount of grants made: \$1,892,841

GRANT HIGHLIGHTS

Over the course of nearly a century, the Greater Milwaukee Foundation has grown and developed our grantmaking in response to the issues that have shaped and challenged our region.

But grantmaking alone cannot make measureable impact. That is why within the past five years, we have made a commitment to take on an expanded leadership role by refocusing our efforts to incorporate a broader array of tools – convening, research and advocacy work, to name a few – to achieve even greater results.

Through discussions with donors, nonprofit partners and community leaders as well as

through research we commissioned, four areas were identified as critical to the future of our community and worth focusing a greater share of our resources and investment in order to make a greater impact: education, neighborhoods, economic opportunities and racial equity and inclusion.

Our aim is to improve the quality of life in our communities and focusing on these impact areas is fundamental to the future vitality of the region we all call home. Information on the following page reflects the investment we have made, thanks to the resources earmarked by our donors, in these particular areas in 2014.

FOUNDATION DIRECTED GRANTS

Total	\$8,648,390
dollars	ψ0,040,330

Total # of agencies supported

Total # of grants awarded



INVESTMENT BY IMPACT AREA

	Strengthening \$1,720,080 education
	Strengthening \$1,598,000 strengthorhoods
	Increasing economic \$678,081 opportunities
	Promoting racial equity \$645,550 and inclusion
	Increasing regional \$4,006,679 vitality



IMPACT AREA STRENGTHENING NEIGHBORHOODS

GOAL

Increasing the livability, affordability and safety of neighborhoods

STRATEGY

- Strengthen the physical, economic and social vitality of neighborhoods
- Enhance the quality of life and build social connections
- Build neighborhood capacity through resident engagement and leadership
- Build capacity across the community development system for coordinated work and greater impact

INVESTMENT

32 grants for a total investment of **\$1,598,000**

GRANTMAKING SPOTLIGHT

STRENGTHENING NEIGHBORHOODS



ORGANIZATION: HEALTHY NEIGHBORHOODS INITIATIVE **GRANT:** \$911,500

INITIATIVE EXPANDS TO FURTHER STRENGTHEN FABRIC OF MILWAUKEE NEIGHBORHOODS

Neighborhoods decline when people lack confidence in them and decide they are not worth investing time, energy and hope.

The Healthy Neighborhoods Initiative, a collaborative approach between the Greater Milwaukee Foundation and city of Milwaukee, makes sure that doesn't happen. It empowers organizations and residents in middle-market neighborhoods by giving strategies they need to stabilize their surroundings. The Foundation retooled the program in 2014 following recommendations from an assessment made by Paul Brophy, a national community development expert, and a market value analysis of Milwaukee. Besides offering additional technical assistance and professional development opportunities, the initiative is collecting more data and expanding its reach. KK River, Polonia, Harambee and Riverwest neighborhoods in Milwaukee and Dunbar Oaks in Waukesha were selected to join.

The Foundation has invested more than \$3.5 million in neighborhoods since the initiative launched in 2006. Thanks to efforts of lead agencies and residents within the neighborhoods, more than 1,000 block activities and community events have occurred and improvements have been made to 1,300 properties, representing \$23 million in reinvestment.

New neighborhoods:

KK River Polonia Harambee Riverwest Dunbar (Waukesha)

Existing neighborhoods:

Thurston Woods/Old North Milwaukee Capitol Heights Havenwoods Layton Boulevard West Sherman Park Lincoln Village/Baran Park Tower Hill (Waukesha)

Photo:

The Artery is a link between Riverwest and Harambee, two of the new neighborhoods participating in the Foundation's Healthy Neighborhood Initiative.



IMPACT AREA STRENGTHENING NEIGHBORHOODS GRANTMAKING HIGHLIGHTS

This section reflects the Foundation-directed grants of \$25,000 and above we made in 2014 toward strengthening neighborhoods in the four-county region. For a full list of grants in this area, visit greatermilwaukeefoundation.org.

Healthy Neighborhoods Initiative

This targeted approach in middle-market neighborhoods centers on four key principles: stabilizing the real estate market, building social connections, improving positive image and improving physical conditions.

Layton Boulevard West Neighbors:

\$126,500 (over three years) to support a portion of the full-time neighborhood coordinator position, which oversees the nonprofit's work toward implementing the Healthy Neighborhoods Initiative's strategies in Milwaukee's Layton Park neighborhood. Projects include hosting a real estate professionals brunch, completing community block projects and helping homeowners and commercial property owners with improvements.

Agape Community Center: \$120,000

(over three years) to support a portion of the full-time neighborhood coordinator position, which oversees the nonprofit's work toward implementing the Healthy Neighborhoods Initiative's strategies in Thurston Wood and Old North Milwaukee neighborhoods. Projects include planning and implementing community improvement projects, conducting homebuying tours and realtor luncheons, and conducting biennial resident surveys.

Havenwoods Economic Development

Corporation: \$120,000 (over three years) to support a portion of the full-time neighborhood coordinator position, which oversees the nonprofit's work toward implementing the Healthy Neighborhoods Initiative strategies in Milwaukee's Havenwoods neighborhood. Projects include starting a rehab grant program, hosting a financial boot camp for residents and conducting bus tours for realtors, bankers and developers.

Riverworks Development Corporation:

\$120,000 (over three years) to support a portion of the full-time neighborhood coordinator position, which oversees the nonprofit's work toward implementing the Healthy Neighborhoods Initiatives strategies in the Harambee and Riverwest neighborhoods. Projects include planning and implementing community improvement projects, creating a marketing plan and connecting homeowners to home rehab resources.

Rebuilding Together Greater Milwaukee:

\$95,000 for emergency repair and accessibility modifications for low-income elderly, veterans and homeowners with disabilities, with particular focus in Amani, Metcalfe Park and the neighborhoods participating in the Foundation's Healthy Neighborhoods Initiative.

University of Wisconsin Extension -

Waukesha County: \$90,000 (over three years) to support a portion of the full-time neighborhood coordinator position, which oversees the nonprofit's work in Waukesha's Tower Hill and Dunbar Oaks neighborhoods. Projects include working with residents to improve their landscaping, introducing area relators to residents and educating residents on financial tools and programs for home improvement.

Housing Resources: \$70,000 toward expansion of its marketing and education services for low to moderate income families throughout the four-county area. These efforts will help identify buyers who are ready to purchase and implement online education classes to reach buyers who may be ready to purchase but cannot attend the current classes offered for a variety of reasons.

Sherman Park Community Association:

\$40,000 to support a portion of the full-time neighborhood coordinator position, which oversees the nonprofit's work in Milwaukee's Sherman Park neighborhood. Projects include building stronger relationships with realtors, developing a neighborhood speaker series and conducting monthly block meetings.



Urban Anthropology: \$40,000 to support a portion of the full-time neighborhood coordinator position, which oversees the nonprofit's work toward implementing the Healthy Neighborhoods Initiative in Milwaukee's Parks and Polonia neighborhoods. Projects include hosting a neighborhood tour, creating new block watch clubs and helping residents with landscaping projects.

Photo: Park Neighborhoods Totem Poles in Kosciuszko Park, which were created by the South Side Artists Guild



IMPACT AREA STRENGTHENING NEIGHBORHOODS GRANTMAKING HIGHLIGHTS

Building Neighborhood Capacity Program

The federally-supported program aims at building resident capacity and leadership and helping distressed neighborhoods develop and implement plans to improve education, employment, housing, health and safety.

Dominican Center for Women:

\$25,000 toward continued support of the implementation of the Building Neighborhood

Capacity Program in Milwaukee's Amani neighborhood.

Neighborhood investments

Sojourner Family Peace Center: \$100,000 to support the development of the Family Justice Center, a 72,000-square-foot building at 6th and Walnut streets in Milwaukee. The project is a partnership with Children's Hospital, Milwaukee County District Attorney's Office, the Milwaukee Police Department and the Milwaukee County Sheriff's Department that seeks to bring all services that address family violence under one roof.

Walnut Way Conservation Corporation:

\$100,000 in capital support for the first phase of the nonprofit's Innovations and Wellness Commons, a redevelopment project on North Avenue in Milwaukee's Lindsay Heights neighborhood. The two-phase project includes redevelopment of a boarded-up commercial building as well as the transformation of a vacant lot that ultimately will provide access to social services, economic development programs, job opportunities and new businesses meeting the needs of the community. **Neu-Life Community Development:** \$75,000 to support building improvements at its main program site in Milwaukee's Lindsay Heights neighborhood, specifically a computer lab, creative arts room and small kitchen area.

Sixteenth Street Community Health Center: \$66,000 to organize stakeholder engagement to

ensure that residents and other stakeholders have a voice in the economic and ecological redevelopment of the Inner Harbor, an area on the near southeast side of Milwaukee where the Menomonee, Kinnickinnic and Milwaukee rivers meet.

Center for Resilient Cities: \$50,000 in capital support for the final phase of the nonprofit's Johnsons Park Challenge, a plan that includes renovation of the 11.5 acre Johnsons Park to include a mix of recreational activities. Improvements include tree-lined pathways to better engage walkers, runners and bicyclists, energy-efficient lighting for extended use year round, a performance stage and benches and bicycle racks.

Community Warehouse: \$50,000 to cover costs of the installation of a sprinkler system in the building the nonprofit uses to store home improvement materials for low-income city residents. The nonprofit provides discounts on the materials to residents and nonprofits within the Milwaukee Redevelopment Zone.

United Neighborhood Centers of Milwaukee: \$50,000 over two years to support a community engagement plan for Milwaukee Neighborhood News Service to increase resident, business and donor engagement, led by a full-time managing director.

Local Initiatives Support Corporation: \$40,000 to expand the Financial Opportunities Center model in Milwaukee to include a third location, planned for the Washington Park neighborhood. The grant also will support the nonprofit's efforts in coordinating cross neighborhood access to LISC's affinity groups around safety, neighborhood marketing and communication and commercial corridor management.

Holton Youth and Family Center: \$35,000 to install a new gymnasium floor.

IFF: \$25,000 to conduct a needs assessment within Milwaukee's Century City neighborhood to document the need for a variety of human services, including child care for working families, Head Start and pre-K programs, licensed home day care, elementary and secondary public education, affordable housing, and community-based primary health services. The data collected will be used in planning the resident engagement work in the redevelopment of the Century City area.

Neighborhood Improvement Development Corp.: \$25,000 in funding for resident-led community improvement projects in Milwaukee neighborhoods that are part of the city's Target Investment Neighborhood program.

Safe & Sound: \$25,000 to support a fulltime community organizer in the Metcalfe Park neighborhood through the Community Partners Program, which seeks to create safer neighborhoods, empower residents and teach and inspire youth to avoid negative behavior and become change-makers.

Wisconsin Humane Society: \$25,000 to expand the Pets for Life Program by supporting a portion of the full-time community outreach coordinator position. The program serves the Amani and Metcalfe Park neighborhoods in Milwaukee, two areas that have limited access to pet care, resources and information. The program builds relationships through door-to-door outreach, community events and provides critical animal care services.

Wisconsin Partnership for Housing

Development: \$25,000 toward business planning for a real estate fund to address the foreclosure crisis in Milwaukee.



PROGRAM: COMMUNITY CONNECTIONS SMALL GRANTS PROGRAM STARTED: July 2014 GRANT AMOUNT: \$10,000

PURPOSE: To support resident-led efforts to improve the quality of life in neighborhoods

New neighborhood grants program starts small, thinks big

Want to create change in a neighborhood? Start small and rely on residents as leaders in the effort.

That's part of the approach of Community Connections, a small grants program piloted by the Greater Milwaukee Foundation, Zilber Family Foundation and Northwestern Mutual Foundation in 2014.

The program provides up to \$500 in grants to projects, events and activities led by residents living and working in 21 eligible neighborhoods in Milwaukee and Waukesha.

To date, 21 projects have been funded for a total of \$8,835.

Not only does the program support residents, but it's run by them too. Ten graduates of the Neighborhood Leadership Institute, a 9-month training program funded by the foundations, make up the committee that reviews and scores the grant proposals.

"By putting residents in the position of making the recommendations and making the decisions about what is funded, I think we actually tap into a level of information, knowledge and local wisdom that we otherwise wouldn't be able to support," said Susan Lloyd, Zilber Family Foundation's executive director.

Reviewers were trained how to evaluate the grants, with "the understanding that it is not necessarily about awarding the money; it's about rewarding the ideas that really benefit the community," said committee member and Metcalfe Park resident Bregetta Wilson.

Some of the approved ideas include positive body image workshops for teen girls in Sherman Park; a community book club in Lindsay Heights and an effort to install more security cameras in the alleys in Grasslyn Manor. "Being able to give opportunities like this to residents can create a lot of change in the communities we live and work in," said Wilson, noting that it's been a learning experience for both reviewers and grantees.

It's been a learning experience for the foundations as well. While simple in concept, the program marked a new way of doing things for the three, which each had distinctive grantmaking processes. But they shared a desire to increase residents' leadership capacity and wanted to build off of the success of the leadership institute, said Darlene Russell, the Greater Milwaukee Foundation's senior program officer. Each foundation contributed \$10,000 toward Community Connections.

Program improvements have been made along the way and the foundations hope to regularly reconvene residents whose projects have been funded so they can share best practices, create new relationships and further build community.

Already a number of grantees have expanded upon their original projects. Tree of Life Earthworks, led by Lori Gramling, received a \$500 grant to convert the first floor of a carriage house in her back yard into a ceramic class studio and community gathering space. It offers classes to area kids and adults on Tuesdays and Saturdays. She's applied for another grant, this time looking to create art in the alleyways surrounding the studio.

"(The grant) takes it one step further and gives it that community support and encouragement," Gramling said. "We don't have aspirations of becoming this big thing, but we would like to continue doing things like this. It makes a big change in the neighborhood."



IMPACT AREA STRENGTHENING EDUCATION

GOAL

Improving educational outcomes for every child in every school, from cradle to career

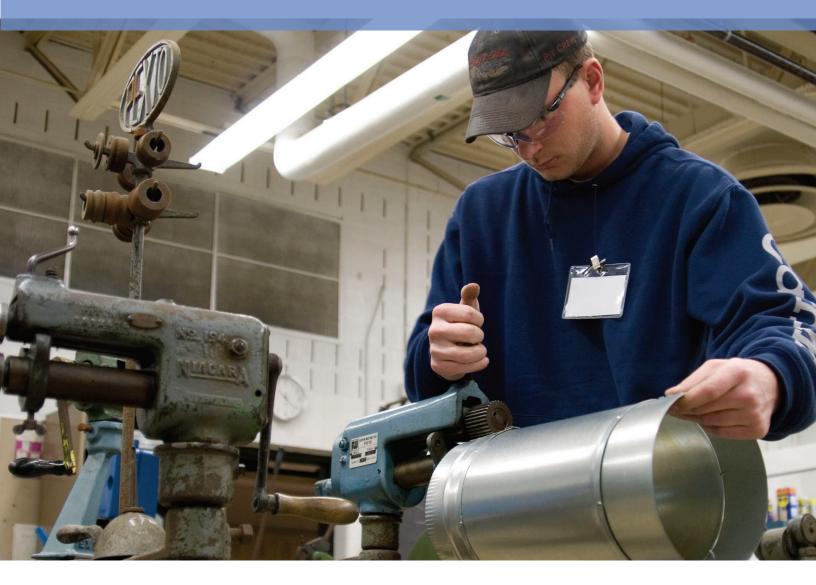
STRATEGY

- Expand quality early childhood education
- Ensure academic success and high school education
- Support postsecondary education access and career readiness

INVESTMENT

27 grants for a total investment of \$1,720,080

GRANTMAKING SPOTLIGHT STRENGTHENING EDUCATION



ORGANIZATION: MATC GRANT: \$500,000

\$500,000 GRANT PAVES PATHWAY TOWARD SUCCESSFUL CAREERS

Over the past century, thousands have turned to Milwaukee Area Technical College to gain the right skills needed to guide them toward a new career. But life gets in the way sometimes and those careers never get launched.

In June, the Greater Milwaukee Foundation announced a threeyear, \$500,000 grant to the MATC Foundation to help its students overcome barriers – be they lack of basic skills or basic resources – to focus on their dreams and launch new careers. The money supports students participating in Career Pathways, a program that gives students a chance to learn industry-based credentials while gaining basic skills like reading, writing and math. The investment was announced at the Foundation's annual meeting as a prelude to our centennial celebration. Our first scholarship fund – the Emil Blatz Fund – was one of six to contribute to the need-based scholarships that will help between 350 and 400 students with costs such as tuition, books and supplies.



IMPACT AREA STRENGTHENING EDUCATION GRANTMAKING HIGHLIGHTS

This section reflects the Foundation-directed grants of \$25,000 and above we made in 2014 toward strengthening education in the four-county region. For a full list of grants in this area, visit greatermilwaukeefoundation.org.

Boys & Girls Clubs of Greater Milwaukee: \$288,000 (over three years) to support a series of college access and success programs designed to prepare high school students to pursue postsecondary education and earn their degree.

Marquette University: \$130,000 to support teacher training for 40 Milwaukee educators, 11 of whom will teach in Marquette's Milwaukee Summer Reading Project, an intensive six-week program that works to improve literacy skills of low-income students entering second, third and fourth grade.

Teach for America: \$100,000 to expand the Teach for America-Milwaukee teacher corps by 14 percent and provide them with coaching to establish student goals and design assessments to analyze student gains. Corps members are placed in high-poverty schools across all school sectors. Milwaukee Public Museum: \$100,000 toward the history museum's newest permanent exhibit, "Crossroads of Civilization: Ancient Worlds of the Near East and Mediterranean," which will teach visitors about the rise and fall of ancient Western civilizations. It is the first new permanent exhibit in nearly 15 years.

University of Wisconsin Milwaukee

Foundation: \$100,000 to support the development of a research and translation center that spans multiple disciplines, departments, and schools/colleges and fosters and pioneers innovative interdisciplinary research that has immediate and long lasting, sustainable effects on the community.

College Possible: \$75,000 to support its ACT college preparation and readiness programming, which serves more than 600 students at 10 Milwaukee high schools.

Wisconsin Early Childhood Association-Madison: \$61,800 in support of a pilot project that will provide on-site technical assistance, mentoring and access to professional development to 12 child care programs in Milwaukee.

Junior Achievement of Wisconsin: \$50,000 in support of its career and personal financial initiative called College, Career & Life Ready Initiative, which works with 2,000 students and their teachers in Waukesha and Milwaukee.

City Year: \$50,000 for corps members at South Division High School to mentor students on college and career readiness in addition to attendance, behavior and academics. The effort aims to improve graduation rates, school and life skills, and promote a college-going culture.

PEARLS for Teen Girls: \$45,000 to provide special training and coaching for agency staff to better serve girls who have experienced some level of trauma such as sexual abuse, physical abuse, or mental illness.

Boys & Girls Clubs of Greater Milwaukee: \$35,000 to support the Higher Ground Leadership Project, which includes senior leadership development and the creation of learning modules for orientation and ongoing staff development to help them serve the kids visiting the clubs.

Milwaukee Repertory Theater: \$30,000 to support "Reading Residencies" in 18 middle

school classrooms that will use a curriculum based on a theatrical play to strengthen student literacy skills.

First Stage: \$25,000 in support of expanding Next Steps, a special summer theatre academy for young people with autism spectrum disorder.

Growing Minds: \$25,000 to support implementation of the Mindfulness School Project in 50 classrooms within Milwaukee Public Schools. The project teaches social and emotional strategies that help students better deal with stressful situations.

Milwaukee Ballet Company: \$25,000 for programmatic outreach to school-age children in Milwaukee in alignment with future goals of the Harmony Initiative. A collaboration between the Ballet, UWM's Peck School of the Arts and the Medical College of Wisconsin, the initiative will house the Ballet's offices and school, performance space for UWM dancers and a full sports medicine clinic.

Morehouse College: \$25,000 to support a Milwaukee student's attendance at Morehouse College.

Pathways to College: \$25,000 to expand the parent engagement component of its year-round program designed to assist low-income, first-generation college prospects with the potential to succeed in college. The expansion will serve 100 additional sixth-grade students and their parents.



IMPACT AREA INCREASING ECONOMIC OPPORTUNITIES

GOAL

Reducing poverty, improving economic vitality of the region and strengthening families

STRATEGY

- Ensuring families have access to basic needs
- Supporting targeted employment strategies for individuals with barriers to employment
- Increasing financial literacy and capability particularly for low-wage working families

INVESTMENT

18 grants for a total investment of **\$678,081**

GRANTMAKING SPOTLIGHT



ORGANIZATION: KIVA ZIP GRANT: \$25,000

MICROLENDING PROGRAM FOCUSES ON CHARACTER, RATHER THAN CREDIT

Baking a pie – particularly his classic sweet potato pie – has become second nature to Johnathan Dye. Building his business has been a little bit more challenging.

Yet since 2011, the financial adviser turned entrepreneur has grown Mr. Dye's Pies to the point that the brand has become bigger than his operation. Dye needed to crank out more pies in less time to keep up with demand, which required a new oven. In less than two weeks, 162 people – mostly strangers – helped him make that investment. They did so through Kiva Zip, an online platform that provides entrepreneurs an opportunity to fundraise 0% interest loans of up to \$5,000 over a 60-day period. Local partners, or trustees, recommend and vouch for their credibility. Anyone can become a lender through as little as a \$5 loan.

Kiva began its international microlending program in Uganda in 2005 and entered the United States in 2011. Milwaukee Mayor Tom Barrett and Wisconsin Women's Business Initiative Corporation joined forces in encouraging Kiva to include Milwaukee as its 11th participating U.S. city. The Greater Milwaukee Foundation's Walter and Oliver Stiemke Fund provided \$25,000 to cover costs associated with Milwaukee's launch on Feb. 17, 2015.

Twenty-nine trustees, including WWBIC and the African American Chamber of Commerce, have vouched for area businesses. Kiva City Milwaukee hopes to fund 200 entrepreneurs and reach \$1 million in loans within its first three years. To date \$178,600 has been loaned to 29 Milwaukee-area business owners.



IMPACT AREA INCREASING ECONOMIC OPPORTUNITIES

GRANTMAKING HIGHLIGHTS

This section reflects the Foundation-directed grants of \$25,000 and above we made in 2014 toward increasing economic opportunities in the four-county region. For a full list of grants in this area, visit greatermilwaukeefoundation.org.

ACCESS TO BENEFITS

Social Development Commission: \$75,000 to support the Volunteer Income Tax Assistance program and expand efforts through its financial capability program to help clients better manage their finances and achieve financial security.

United Migrant Opportunity Services: \$30,000 supporting legal advocacy services for immigrant victims of domestic violence and sexual assault who are applying for legal immigration status under the Violence Against Women Act.

Froedtert Hospital Foundation: \$25,000 to help individuals within Milwaukee County who qualify for health care under the Affordable Care Act to enroll in the marketplace.

BASIC NEEDS

La Casa de Esperanza: \$100,000 to help people with low income gain access to the Earned Income Tax Credit as a means of increasing their income, as well as to build their financial literacy and establish financial assets.

Waukesha County Community Dental

Clinic: \$25,000 to help the clinic expand its services, including emergency care, exams and restorative care, to low-income adults in Waukesha County.

EMPLOYMENT

Milwaukee Area Workforce Funding Alliance: \$150,000 (over two years) for matching funds to secure a Social Innovation Fund grant from the National Fund for Workforce Solutions. The funds will support workforce training programs in automotive repair, manufacturing and health care, and will help build the alliance's capacity.

Center for Veterans Issues: \$50,000 to support a vocational training and employment incubator for veterans at Troop Café, a notfor-profit café and commercial kitchen for its Veterans Manor housing facility.

Milwaukee Center For Independence:

\$50,000 to support its efforts toward adapting its employment training program to be able to serve an additional 400 clients without disabilities in the fields of hospitality, health care, custodial and warehouse operations.

Wisconsin Council on Children & Families:

\$50,000 to help launch a new project called Faithful Citizenship, in conjunction with Citizen Action of Wisconsin Education Fund, Wisconsin Council of Churches and WISDOM. The project's purpose is to build a critical mass of leaders statewide who will work together to inspire communities to take actions to dramatically reduce poverty and racial disparity.

MetroGo!: \$29,000 in support of the second phase of its workforce mobility study, which includes outreach to the business community to help address workforce mobility gaps in metro Milwaukee.

Milwaukee Christian Center: \$25,000 for Youthbuild, a job training program serving youth ages 16 to 23.



IMPACT AREA PROMOTING RACIAL EQUITY AND INCLUSION

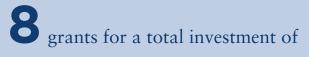
GOAL

Enhancing relationships among diverse populations and creating opportunities for all people to more fully participate in civic life

STRATEGY

- Reduce social and economic disparities based on race
- Encourage civic participation by all
- Support efforts to build an inclusive community

INVESTMENT





GRANTMAKING SPOTLIGHT

PROMOTING RACIAL EQUITY AND INCLUSION



Gary Porter, 9-24-2014, Milwaukee Journal Sentinel, © 2015 Journal Sentinel, Inc., reproduce with permission

ORGANIZATION: MILWAUKEE POLICE DEPARTMENT **GRANT:** \$500,000

FOUNDATION SUPPORTS EXPANDED CRISIS INTERVENTION TRAINING FOR POLICE

The Greater Milwaukee Foundation announced a significant investment toward specialized training that better prepares police on how to interact with the community's most vulnerable residents.

At a press conference in December at Milwaukee's City Hall, President and

CEO Ellen M. Gilligan committed \$500,000 to enable the Milwaukee Police Department to train more officers on how to interact with someone with mental illness in an emergency crisis situation. The goal is to have all personnel complete the Crisis Intervention Team program by the end of 2017. The request for expanded training was made at the urging of the family of Dontre Hamilton, a Milwaukee man who struggled with schizophrenia and was shot and killed by a police officer in Red Arrow Park in April 2014.



IMPACT AREA PROMOTING RACIAL EQUITY AND INCLUSION

GRANTMAKING HIGHLIGHTS

This section reflects the Foundation-directed grants we made in 2014 toward promoting racial equity and inclusion in the four-county region.

COA Youth & Family Centers: \$100,000 (over two years) to support the production of "Precious Lives," a two-year, 100-part radio series about young people and gun violence. Brad Lichtenstein, a 2011 Mary L. Nohl Fellow, and his company, 371 Productions, are producing the 3- to 5- minute stories. **Cardinal Stritch University:** \$50,000 to support the African American Leadership Program, a nine-month program that provides coaching and networking opportunities to strengthen the leadership potential of African American professionals. **Diverse and Resilient:** \$25,000 for the second phase of Acceptance Journeys, a social marketing campaign designed to address stigma and discrimination against lesbian, gay, bisexual and transgender individuals. The second phase will expand outreach and messaging to Milwaukee's Latino community.

Wisconsin Historical Society Foundation

Inc.: \$25,000 to support the initial phases of digitization and categorization of the papers of civil rights leader Vel Phillips.

Milwaukee Muslim Women's Coalition:

\$15,000 to help the group launch a Muslim Film Festival in 2015. The coalition has co-presented a number of films in past years, but this will be the first such festival of its kind in Milwaukee. The inaugural festival is expected to include five films and a number of the filmmakers and artists will be available for discussions and presentations during the festival's run.

IMPACT Alcohol & Other Drug Abuse

Services: \$8,660 for an assessment of the impact of the Foundation's board diversity policy.

Nonprofit Center of Milwaukee, Inc.: \$2,000 to provide scholarships to 20 attendees for the inaugural Building Opportunities for Boys and Men of Color Conference in Milwaukee.



The Friendship Circle:

\$20,000 to expand its creative enrichment programming and create an outdoor sculpture in conjunction with Milwaukeebased artist Marina Lee and the children and adults with special needs and their families whom the agency serves.

Schinika Fitch, graduate of the African American Leadership Program

PROGRAM: AFRICAN AMERICAN LEADERSHIP PROGRAM STARTED: 2008 GRANT AMOUNT: **\$50,000**

PURPOSE: To increase alumni engagement and attract more male professionals into the program

Program accelerates personal, career aspirations for African American professionals

Cardinal Stritch University's African American Leadership Program is billed as a program that doesn't just strengthen leaders, but transforms them.

If anyone can attest to that it is Schinika Fitch. Before she started with the program in 2014, her career revolved around PR and communications, including jobs as a television news producer and years spent in corporate communications.

Fitch was looking to have a more direct impact on the lives of young women, though, and credits the ninemonth program with giving her the confidence needed to make that change.

"You really get to the core of who you are and what you want to do with your life," said Fitch, who now conducts youth outreach with Sojourner Family Peace Center. "It gave me the encouragement I needed to take that leap of faith that I could do something new and different."

Over the past six years, 120 area leaders like Fitch have benefited from the program, which has been described as taking people on a "journey of your own leadership potential." The way it does so is first by offering one-on-one executive coaching and 360-degree evaluations to identify an individual's mission and passion and how they bring that to their workplace, said program founder Jeanette Mitchell, Ed.D.

The program offers daylong learning sessions that touch upon topics like how to form a personal mission statement and build a personal brand. Evening networking sessions give participants an opportunity to connect with and learn from prominent African American community leaders including Howard Fuller, a civil rights activist and education reformer, and Thelma Sias, a We Energies executive.

Participants represent all sectors and reflect a diversity of ages and experiences. Established city leaders and

young Milwaukee transplants are often in the same class.

The new networks formed and collaborations that occur are valuable to participants and their employers. But Mitchell believes Milwaukee will reap the benefits as well because a whole new generation of leaders are developed who can work together to lift up the community.

The Greater Milwaukee Foundation and its donors have supported the program from its beginning in 2008 and over the years have awarded grants to research its impact on participants and expand the classes to include a more diverse cross-section of individuals.

While companies initially questioned the need for such a program, Mitchell said, now places like Northwestern Mutual and Boys & Girls Clubs of Greater Milwaukee sponsor a number of employees annually.

Participants not only learn more about themselves and their potential, but become better connected to Milwaukee through service projects they design and lead.

Demar Wilder, an investment research analyst at Northwestern Mutual, studied the issue of black male incarceration in Milwaukee. He spoke with local aldermen, leaders within the Department of Corrections and others to research available resources to men as they reintegrate into society. He found it rewarding to be able to work on such a critical community issue.

"You get all the training, expertise and resources necessary to make yourself a better employee and better person in the community," Wilder said. "It really empowers us all to make a difference."



INCREASING REGIONAL VITALITY

GOAL

To contribute to a thriving community and enhance the quality of life for those living and working in the region

STRATEGY

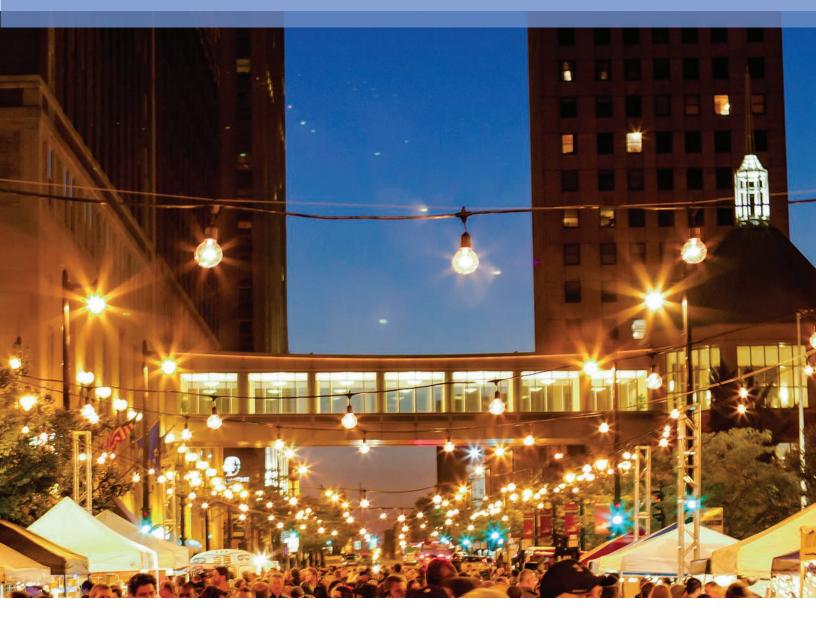
- Cultivate and support an appreciation of diverse cultures and art forms
- Support efforts to provide safe, affordable housing throughout the region
- Protect significant environmental assets and ensure availability for public use and enjoyment
- Support access to quality health care

INVESTMENT

212 grants for a total investment of \$4,006,679

GRANTMAKING SPOTLIGHT

INCREASING REGIONAL VITALITY



ORGANIZATION: GREATER MILWAUKEE COMMITTEE **GRANT AMOUNT:** \$25,000

EMPTY PARKING LOT FINDS NEW LIFE, MEANING THROUGH NIGHT MARKET

The parcel of land bordered by North 4th Street and West Wisconsin Avenue in Milwaukee's Westown neighborhood is an otherwise uninspiring lot.

For three nights in 2014, however, it took on new life and meaning thanks to a growing movement called creative placemaking, which reimagines and reactivates public spaces. The Newaukee Night Market – held there in July, August and September – transformed it into an urban open-air market. More than 6,000 people were drawn to the lot and surrounding streets those three days. They enjoyed a multitude of experiences ranging from a popup samba performance to live art creation to a sampling of diverse food and art vendors. Social architecture firm Newaukee coordinated the events, which were part of a larger project led by the Greater Milwaukee Committee and funded by ArtPlace America, a collaboration among 12 national foundations that supports creative placemaking nationwide. The Greater Milwaukee Foundation, through a \$25,000 grant from the Marvin W. Haesle Fund for the Arts, was one of 15 local funders.



IMPACT AREA INCREASING REGIONAL VITALITY

GRANTMAKING HIGHLIGHTS

This section reflects the Foundation-directed grants of \$25,000 and above we made in 2014 toward increasing regional vitality in the four-county region. For a full list of grants in this area, visit greatermilwaukeefoundation.org.

ARTS AND CULTURE

Bradley Family Foundation: \$125,000 to administer the Mary L. Nohl Individual Artist Fellowship program, which supports emerging and established artists within the metro Milwaukee area.

Milwaukee Art Museum: \$100,000 to support the last phase of its "Plan for the Future" capital campaign, which supports renovations of the original Saarinen building and Kahler addition, reinstallation of the collections and an audience development initiative.

Radio for Milwaukee (88.9 Radio Milwaukee):

\$65,000 to support a year-long series of events, including social gatherings, concerts, convenings, lectures and diverse performances, designed to bring together diverse segments of our community to explore tough issues. Planned by a task force representing different segments of the community and focused on young adults, the Cultural Commons will leverage the membership of the partners to participate in the events.

Milwaukee County Historical Society: \$55,154 toward creation of "Pride in Place: Milwaukee's Architecture and Built Environment," an exhibit debuting in spring 2015 that allows visitors to explore the city's architectural history as well as explore how the built environment affects and is affected by residents. The grant also supports the creation of a small exhibit on the Foundation's 100 years of generosity within the Milwaukee community. **Arts@Large:** \$25,000 for "There's No Place like Home: Milwaukee," an artist-in-residence collaborative project that will explore the cultural and racial implications of Milwaukee's housing history. Nearly 2,000 K-12th graders from five MPS schools will participate. **Creative Alliance Milwaukee:** \$25,000 to help the nonprofit expand and deliver its new programming to a more diverse membership base.

In Tandem Theatre: \$25,000 over two years to establish a production manager position to help meet production demands as the organization grows.

CHILDREN, YOUTH AND FAMILIES

Boys and Girls Clubs of Washington County: \$100,000 to help the Boys & Girls Club facility in West Bend nearly triple its space by adding 7,500 square feet to its existing building.

Ronald McDonald House Charities of Eastern

Wisconsin: \$25,000 to increase the nonprofit's capacity to house families with critically ill children who are treated in area hospitals and reduce the waiting list for its services. It doubled

the number of private guest rooms to 70 as well as expanded its family dining room and parking.

Youth and Family Project: \$25,000 to cover costs of sewer repair for a multi-purpose building that houses Washington County Department of Human Services staff and also is used as housing for individuals with mental health and/or AODA issues.

COMMUNITY DEVELOPMENT

Midwest Bikeshare: \$70,000 (over two years) to provide staff capacity for Bublr Bikes, Milwaukee's first bike-sharing program, which launched in 2013. The grant will support part-time development staff who will secure sponsorship of additional bike kiosks throughout Milwaukee's downtown and neighborhoods as well as raise funds for ongoing maintenance.

ENVIRONMENT

Urban Ecology Center: \$100,000 to support the first phase of its Riverland Project, which includes the acquisition of 4.5 acres of land next to its Riverside Park branch, demolition of one building, remodeling of another building and plan development of long-term use of the site. **Ozaukee Washington Land Trust:** \$30,000 to help develop a comprehensive plan to identify and protect key properties in the Milwaukee River Basin.



INCREASING REGIONAL VITALITY GRANTMAKING HIGHLIGHTS

HEALTH AND HUMAN SERVICES

Sojourner Family Peace Center: \$75,000 (over two years) to expand its school and neighborhood-based outreach and education programming.

Benevolent Corporation Cedar Community:

\$50,000 to support development of Cottages at Cedar Run, a 60-unit memory care facility in Washington County designed for older adults who have Alzheimer's disease and dementia.

Aurora Foundation: \$48,414 to support cardiac research, specifically a test that will determine whether patients with depressed cardiac function and indices of high left atrial pressure are at high risk during non-cardiac surgery.

Family Service Agency of Waukesha County:

\$45,000 (over two years) to provide mental health training and support to teachers at three Waukesha schools – Whittier and Prairie elementary schools and Horning Middle School – so they can better identify and respond to students with behavioral and mental health issues.

Advocates of Ozaukee: \$40,000 to create a 900-square-foot designated counseling and group space for clients as well as update its facility to include an ADA-accessible bathroom.

Benedict Center: \$35,000 to further develop the "Sisters Program," a community-diversion program in partnership with the Milwaukee Police Department, which provides counseling and educational support for women engaged in prostitution.

AIDS Resource Center of Wisconsin: \$25,000 to cover costs associated with renovating a former homeless shelter into a transitional housing facility for HIV positive individuals. ARCW's Wisconsin House will move to the space and provide housing for 15 individuals.

Bread of Healing Clinic: \$25,000 to partially support the part-time dental program coordinator position so the clinic can increase the number of low-income, uninsured adults it serves through its dental care program. The individual will oversee the dental care services, recruit dental professionals to volunteer and develop a referral network of providers who can see clients for other restorative care.

Hope Street Ministries: \$25,000 to remodel its apartment building at 26th Street and Capitol Drive, which serves adults recovering from addictions. Twenty-two apartments will be refurbished, a basement will be redesigned to incorporate space for children's programming and an adult lab and small group space will be added.

IndependenceFirst: \$25,000 to expand the organization's leadership program for youth with disabilities, which helps participants increase their knowledge or skills in leadership, independent living, healthy relationships, safe and risky behaviors, and career options.

Leukemia & Lymphoma Society – Wisconsin Chapter: \$25,000 in support of two research studies. One, underway at the Medical College of Wisconsin, looks at ways to improve patient survival following stem cell transplantation. The other, underway at the University of Wisconsin-Madison by a former Shaw Scientist winner, investigates how mutations in a particular gene cause leukemia and if a certain combination therapy might kill leukemia cells.

Marquette University: \$25,000 to support a study that will evaluate the effects of movement – specifically ballroom dance – on helping improve the quality of life for people with multiple sclerosis.

Meta House Inc.: \$25,000 to support its peer consumer specialist program, which pairs drug addicted women in their first year of recovery with a formerly addicted peer for support.

Public Policy Forum: \$25,000 for the Outpatient Mental Health Clinical Capacity Analysis, which will assess the continuum of clinical outpatient services in Milwaukee County for low-income adults and children to inform collaborative planning and help shape the behavioral health care system in Milwaukee.

Sixteenth Street Community Health Center: \$25,000 for HIV prevention through needle exchange and community outreach.

UWM Foundation: \$25,000 to support Arts at Home/Islands of Milwaukee, a collaborative and creative partnership that will connect artists, researchers and care providers with older adults who are living alone or who are underconnected in their communities.



PROGRAM: **BLACK ARTS THINK TANK** STARTED: **2014** GRANT AMOUNT: **\$125,000**

PURPOSE: To expand the capacity and stability of African American Children's Theatre, Ko-Thi Dance Company and Handsberry-Sands Theatre Company as they merge and integrate operations At one point, organizations like the Inner City Arts Council and City Ballet Theatre were front and center in Milwaukee's African American arts community. Now they are merely a footnote.

Executive directors of Ko-Thi Dance Company, African American Children's Theatre (AACT) and Hansberry-Sands Theatre Company were determined to keep their groups from experiencing that same fate. The groups share more than a century of serving Milwaukee but were struggling to stay alive. After a while the leaders realized they couldn't keep operating the same way and expect things to change.

"We didn't want to go out like that," said Constance Clark, who founded AACT in 1989. "We felt like we needed to do one more 'something' to see if we could be saved."

Their desire for a new approach led to the idea of the Black Arts Think Tank, an umbrella organization that consolidates the groups' administrative and operational functions. It originally took shape with help from Barbara Lawton, chair of the Wisconsin Arts Board, who convened a conference to talk about issues facing small arts groups. It took on life with guidance and support from community leaders and Greater Milwaukee Foundation Board members Cory Nettles and Jackie Herd-Barber.

"I have watched, admired and supported these three groups to varying degrees and knew their legacy business model was not sustainable," said Nettles, founder and managing partner of Generation Growth Capital. "Our community needs diverse arts offerings as part of a healthy, thriving community and we have to figure out a business model to do that." Following a two-year strategic planning process, BATT hired an executive director, recruited a board, led by Nettles and Herd-Barber, and found a new home at the Marcus Center for the Performing Arts. It is focusing on consolidating budgets, creating a combined fundraising strategy and building a programming schedule that includes collaborations between the three groups.

"We are essentially proving out a new theory," said Barbara Wanzo, BATT's executive director, who describes the process as equal parts start up and turnaround.

Clark said they are excited to be in that pioneering role and feel buoyed by the community response. They look forward to refocusing their efforts on the stage and letting someone else handle the back office.

"I'm waiting to exhale," said Ferne Caulker, who started Ko-Thi in 1969. "I haven't been able to do that in a long time."

It is more than just about the survival of the three organizations. Those involved believe when – not if – it works, BATT will serve as an inspiration to other groups.

There is a learning curve involved, but the three women are determined to make the new model work because they feel the community – particularly its children – depend on it.

"So many children need the arts because it builds self-esteem and confidence," Clark said. "Some of the problems we have in the city right now are because kids are not getting that outlet."

INVESTMENT PERFORMANCE COMPLEXITY EMERGES

In 2014, capital markets continued to move higher with little of the volatility that characterized markets from 2007 to 2011. Yet signs of change emerged as energy prices fell precipitously while the U.S. dollar rose strongly, thereby reducing the value of non-U.S. investments. As a result, investment returns diverged considerably depending on geography and exposure by economic sector.

The Greater Milwaukee Foundation continues to thrive despite the ongoing complexity of the investment climate. For 2014, the Foundation avoided a number of the most difficult areas and posted a 5.1 percent return and has now achieved a five-year return, through Dec. 31, 2014, of 9.6 percent per year.

This outcome continues to be the product of the Foundation's decision to maintain a strategy that is driven by its long-term objectives while utilizing the size of its assets to access exceptionally capable investment management firms. Thanks to the highly capable oversight of the Foundation's Investment Committee, long-term returns have been well above market benchmarks along with other endowments and foundations across the country.

Over the years, the Foundation's investment strategy has steadily evolved in order to better capitalize on market opportunities. This process is deeply rooted in maintaining a long-term perspective and utilizing the combined expertise of the Investment Committee and the investment managers.

The Foundation's Investment Committee remains focused on maintaining a prudent strategy, consistently executed. This strategy is built on diversification and balance, as there is considerable risk involved in allowing an overly aggressive or conservative approach to take hold. For the last few years, markets in the United States have been among the leaders for equity returns. This has not and will not always be the case and the Foundation maintains a meaningful allocation to the U.S. stock market but also allocates on a global basis in order to increase long-term returns and control risk.



Dave Kundert Chair, Investment Committee

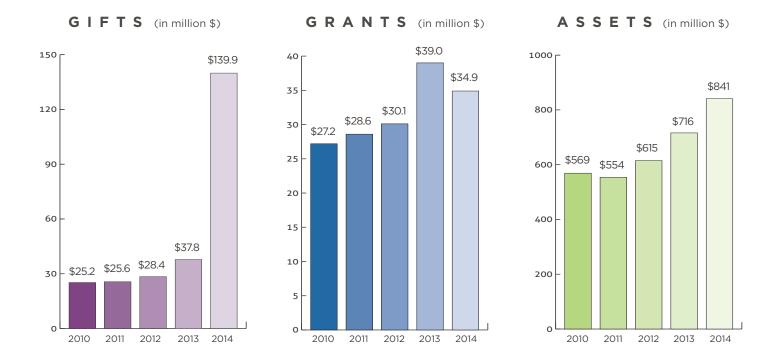


Mike Miller Managing Director, Colonial Consulting

INVESTMENT RETURNS for the period ending 12/31/2014

	1 year	3 year	5 year	7 year	10 year
GMF Investment Pool	4.4%	11.5%	9.6%	5.5%	7.0%
U.S. Bank Trust Pool	4.7%	11.8%	9.1%	5.5%	7.0%
BMO Harris Bank Trust Pool	6.1%	13.3%	9.9%	5.5%	7.0%
JPMorgan Chase Trust Pool	6.6%	12.5%	10.2%	6.6%	7.7%
S&P 500	13.7%	20.4%	15.5%	7.3%	7.7%
Morningstar Moderate Allocation	5.8%	11.1%	8.8%	4.5%	5.4%

FINANCIALS



TOTAL # OF FUNDS

TOTAL # OF GRANTS AWARDED

3,842

1,236

GRANTS RANGED FROM

\$2-\$1,298,413

Additional investment performance information as well as our recent 990 and audited financial statements are available on our website at www.greatermilwaukeefoundation.org.

HERBERT J. MUELLER SOCIETY

In 2014, the Greater Milwaukee Foundation welcomed 18 new members to our Herbert J. Mueller Society. The recognition society honors the work of attorneys, accountants and financial planners in educating their clients about the work of the Foundation and helping them understand the many advantages of giving back to the communities where they've started their businesses or careers and raised their families. Since starting in 2007, the society has welcomed 300 professional advisers from 159 different firms throughout the four-county area.

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A tradition of giving that continues...

HERBERT J. MUELLER SOCIETY OUTSTANDING PROFESSIONAL ADVISER AWARD



A founding member of the Herbert J. Mueller Society, Nancy Bonniwell has served as an incredible asset and advocate for the Greater Milwaukee Foundation and for charitable giving in the community.

Over the years she

has earned the distinction of being named one of the Best Lawyers in America in business law and estate planning. She has worked at Weiss Berzowski & Brady for 20 years, aiding individuals of varying ages and assets and with different family and financial circumstances. The one thing these individuals all have in common is her assurance that there will be a smooth and sure transfer of assets in accordance with their wishes. Charitable giving is an active part of that conversation. She has made dozens of referrals to the Foundation over the years, many of which have resulted in lifetime and deferred gifts.

Nancy is always willing to speak about planned giving to her colleagues, fellow attorneys and the community at large. Truly practicing what she preaches, she's engaged as a volunteer for several nonprofits and professional organizations, including board member of Pro Health Care and Tall Pines and past president of the Waukesha County Estate Planning Council.

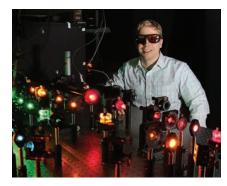
SHAW SCIENTIST AWARDS

When Dorothy Shaw died in 1980, she left both a wish and a challenge to the Greater Milwaukee Foundation. In a brief paragraph in her 10-page will, the quiet and conservative widow of a prominent Milwaukee attorney wrote simply that she was leaving the Foundation the balance of her estate – about \$4.5 million – to support research at the University of Wisconsin-Madison and University of Wisconsin-Milwaukee in the fields of biochemistry, biological science and cancer research.

Shaw's idea was subject to interpretation and creativity. What the Foundation ultimately designed, with guidance from a group of leading researchers and local scientists, was the Shaw Scientist Award. The unique annual program awards \$200,000 in unrestricted money to young scientists at critical points in their careers to advance research in those fields. Since it began in 1982, it has given more than \$12.5 million to 65 scientists.

AARON HOSKINS, PH.D.

Assistant professor of biochemistry; UW-Madison College of Agricultural & Life Sciences



Aaron Hoskins studies the cellular machines that interpret the information found in DNA genes and put it in a form that can be used by the cell. His research team focuses primarily on

a machine called the spliceosome, which is made from more than 100 different pieces.

"We use cutting-edge microscopes to study how all of those different pieces come together to build a working spliceosome machine," Hoskins said. "In the long term, we would like to study how these machines are built in living cells and how errors in their construction can lead to diseases like blindness or muscular atrophies."

Shaw Scientist funding will enable Hoskins to pursue "high-risk/high-reward" projects vital to understanding how cellular machines are built. It also will help him accommodate undergraduates seeking summer research opportunities in his lab.

NATHAN SHERER, PH.D.

Assistant professor of oncology, UW-Madison School of Medicine and Public Health



Interested in understanding how viral infections spread from cell to cell, Nathan Sherer specifically concentrates on HIV, which infects more than 35 million people worldwide and results in about 1.5

million deaths each year.

"While combined antiviral therapy can reduce viral load and delay progression to AIDS, these drugs are expensive, have costly side effects and can drive the evolution of drug-resistant viruses," Sherer said. "Identifying new viral and cellular targets leading to the development of better therapies remains a crucial goal for the field."

With Shaw Scientist funding, Sherer will further characterize the process by which infected cells form tight contacts with uninfected cells, making virus production and proliferation more efficient. He hopes this research eventually will lead to ideas for interrupting this process and the development of drugs effective against HIV as well as new broad-spectrum antiviral medications.

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- P. 69 Photo courtesy of Nathan Sherer





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