

a magazine for friends of the GREATER MILWAUKEE FOUNDATION

GREATER together

Game changer

Is philanthropy
impacting outcomes in
the classroom? (Yes!)



Greater Milwaukee
FOUNDATION
greater together

Volume 1 Issue 1 Spring 2016

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SPRING 2016



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GREATER together

A MAGAZINE FOR FRIENDS OF THE
GREATER MILWAUKEE FOUNDATION
VOLUME 1 :: ISSUE 1 :: SPRING 2016

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Third grader from Milwaukee
French Immersion School



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Spring 2016 GREATER together

Spring 2016

PRESIDENT'S Message

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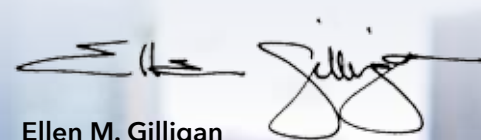
It's no coincidence "community" and "communicate" share their first seven letters. With that in mind, welcome to the first issue of *Greater Together*, the Greater Milwaukee Foundation's new magazine. It shares the story of how your vision as generous donors, combined with the Foundation's insights into community needs and its work with partners, are indeed creating a more vibrant region.

One example and the theme of our first *Greater Together* issue is our quest for all Milwaukee children to have educational success, cradle to career. Since the Foundation launched Milwaukee Succeeds in 2011, the communitywide partnership is making a difference, as you can read on Page 5. Test scores and other measures show the strategies of Milwaukee Succeeds work. We also hear of personal successes, like a kindergartener at Forest Home Avenue School recently proclaiming to his teacher, "I'm really getting smarter and smarter!"

The Foundation can have this impact because for generations, many generous people have shared our belief that education is key to young people reaching their full potential and have chosen the Foundation to carry out their wishes. Our donor Marie Weiss on Page 13 demonstrates this as she gives both her time and treasure to serve kids. Because of smart and kind donors like her, the Foundation was able to provide more than \$6.5 million in grants supporting education last year.

The beauty of a community foundation is that we are designed to help donors, no matter what their interests, to support the causes they care about, now and for the future. I hope you see yourself in these pages, because in this community, we are not parallel lines. We are interwoven threads. We are Greater Together.

Thank you for your continued partnership in philanthropy.



Ellen M. Gilligan
President & CEO
Greater Milwaukee Foundation

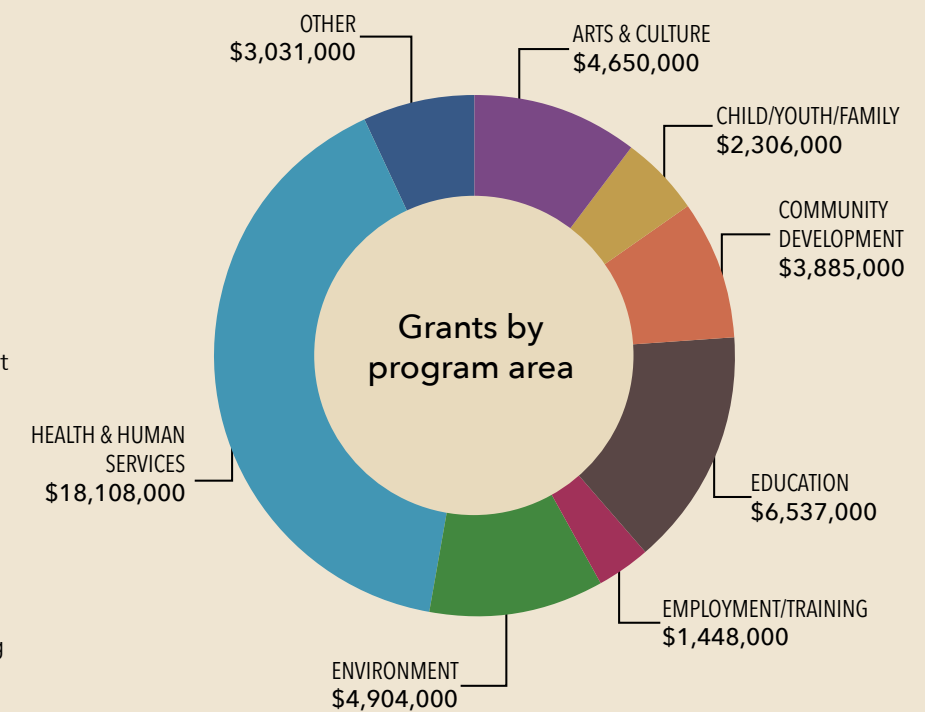


COMMUNITY benefits from record year of generosity

More than
\$44.8
million in grants

2015 was one for the history books. Not only did it mark the Greater Milwaukee Foundation's 100th year of service to the community, making it just one of a few community foundations in the country that have reached that milestone, it marked its largest grantmaking year as well.

The Foundation and its donors provided more than \$44.8 million in grants to support a broad cross-section of interests and invest in strengthening important community organizations that are working to help meet community needs.



“We were able to reach this incredible milestone due to the generosity of our donors. It also is made possible by our community's collective dedication to making greater Milwaukee a more vibrant and successful region.”

Thomas Spero
Greater Milwaukee Foundation Board chair



Early indicators reveal Milwaukee Succeeds is working

Imagine uniting an entire
community around one goal
that could impact generations.

Milwaukee Succeeds, an educational partnership the Greater Milwaukee Foundation launched in 2011, has done just that. The collective impact of that communitywide effort has taken hold and is reporting progress. Many philanthropists joined in the efforts and are aligning their grantmaking. More than 300 organizations are collectively problem-solving to create better outcomes for Milwaukee's kids. Overall, 10 of the 11 educational benchmarks it tracks are moving in a positive direction.

Nearly as important and impactful is the partnership's influence on

creating new collaborations, developing new strategies and changing mindsets.

Five years ago, those accomplishments seemed elusive. Now they are realities.

It took a community to get there.

"Milwaukee's work has modeled the perseverance and tenacity that communities have to have to do this work," said Jeff Edmondson, managing director of StriveTogether, a national network of educational partnerships that helped develop Milwaukee Succeeds' framework.

Results have not happened overnight, but the momentum is accelerating, partners say. Milwaukee Succeeds has six staff members and hundreds of volunteers dedicated to closing the achievement gap in four areas: kindergarten readiness, school readiness, career readiness and social and emotional health. Several pilot programs underway are showing promising results. As a testament to the partnership's future, five local funders recently committed a total of \$5 million over the next four years to support it.

“Helping all children succeed requires a communitywide response.”

John W. Daniels Jr., former Greater Milwaukee Foundation Board chair

When the Foundation launched Milwaukee Succeeds, it was a new way of thinking in a city that had been a testing ground for educational reforms. Many initiatives had been tried. There was reticence around yet another education attempt that could fall short.

By virtue of being a community foundation, the Foundation was in a unique position to spearhead the effort. It knew the community, had invested millions in education over the years and had taken a broad-based approach toward addressing a complex issue. When President & CEO Ellen M. Gilligan brought the idea with her from Cincinnati, Strive's birthplace, the Foundation Board recognized an opportunity to make a bigger investment.

"Helping all children succeed requires a communitywide response," said John W. Daniels Jr., who served as Foundation Board chair when the partnership began. "Milwaukee Succeeds embodies the Foundation's commitment to education, rooted in 100 years of history. I'm proud of the fact it has played

such a pivotal role in introducing this new approach."

Milwaukee Succeeds is among a handful of partnerships within Strive's 65-member network with a community foundation as its backbone. That relationship provides powerful advantages, namely resources, longevity and expertise, said Jackie Herd-Barber, a Foundation Board member and Milwaukee Succeeds co-chair.



Student from Milwaukee French Immersion School

Student from Hawley Environmental School



The Foundation’s leadership and the partnership’s approach – uniting diverse groups around a single purpose, identifying best practices, expanding what works and using data to drive decisions – motivated community leaders like Danae Davis to join.

“We are looking for what’s best, and we are discovering that together,” said Davis, who signed on as a volunteer while CEO at PEARLS for Teen Girls and was hired as Milwaukee Succeeds’ executive director last May. “We take the politics hopefully out of

education because we focus on the kids.”

Development of the partnership’s four goal areas and strategies relied on input from hundreds of organizations. A number of groups are concentrating on each area, and at least 40 organizations make up each group. The largest – third-grade reading – involves 75. With so many diverse voices, it has taken time to pinpoint goals and identify strategies.

Bright spots are emerging. Support from local funders, including United Way,

Northwestern Mutual Foundation, Herb Kohl Charities and Bader Philanthropies, has fueled pilot programs around literacy that are improving test scores. Funders like United Way are increasingly aligning their grantmaking with the partnership’s goals. Milwaukee Public Schools used a new evidence-based literacy model to drive its newly redesigned curriculum.

And, nearly five years later, almost all of the organizations that the Foundation convened at the first meeting in 2011, remain involved.

Participants say the sense of urgency on behalf of Milwaukee’s kids and the acknowledgement that such an approach can work – simply because nothing else has – have kept them engaged.

“Our base of community support is as committed as ever,” Davis said. “To know that adults are united in our cause of improving educational and life outcomes for all children in Milwaukee instills a belief that together we can make a difference for our children.”

MILESTONES

July 2011

Greater Milwaukee Foundation, in partnership with the Greater Milwaukee Committee, Metropolitan Milwaukee Association of Commerce, Milwaukee Urban League, United Way of Greater Milwaukee & Waukesha County and Bader Philanthropies, launches Milwaukee Succeeds. Foundation Board member Jackie Herd-Barber, Marquette University President Mike Lovell and Northwestern Mutual Chairman and CEO John Schliske lead the new partnership.



June 2013

Milestone Report, an annual report that provides baseline academic data of students in Milwaukee, is launched. It sets community goals for improvement by 2020 and tracks progress toward those goals.



January 2014

Transformative Reading Instruction model begins as a pilot program in two Milwaukee Public Schools.

May 2015

Danae Davis, former CEO of PEARLS for Teen Girls and an active member of Milwaukee Succeeds from its beginning, becomes executive director.



June 2015

The Milestone Report shows 10 of the 11 educational metrics it tracks are moving in a positive direction. View the complete report at milwaukee-succeeds.org/milestone.

August 2015

Bader Philanthropies, Greater Milwaukee Foundation, Herb Kohl Charities, Northwestern Mutual Foundation and United Way of Greater Milwaukee & Waukesha County commit \$5 million over four years to support Milwaukee Succeeds.



First-grade teacher
Emilie McClure and her
students at Milwaukee
Academy of Science

READY TO READ

New literacy model in Milwaukee setting
students and teachers up for success

Not long ago, Karen Penvose, Milwaukee Academy of Science's achievement director, was in a meeting with a teacher who was in tears, frustrated that she couldn't give her struggling readers all the help they needed.

"I want to do my best for my students, but I don't have all the time I need to really address all their needs," the teacher said.

MAS teachers today are feeling more equipped thanks to a new comprehensive literacy model called Transformative Reading Instruction (TRI). They have more

"This is going to be the year we are seeing students really making the growth we've been envisioning for so long."

Karen Penvose, Milwaukee Academy of Science's
achievement director

strategies and support to help their students and, in turn, those early readers are making great gains in as little as a few months' time.

With TRI, teachers receive professional development and coaching to improve how they teach foundational reading and social and emotional skills. Students get one-on-one tutoring and experiential learning opportunities. Parents learn tips on how to support their children's learning at home.

"This is going to be the year we are seeing students really making the growth we've been envisioning for so long," Penvose said.

The model, used at MAS and six other schools, is one of the early success stories of Milwaukee Succeeds, the educational partnership the Greater Milwaukee Foundation launched in 2011. If test scores are any indication, the model is living up to its name. Transformation doesn't stop there, though. It has marked a shift in thinking and learning for teachers and administrators alike. It also was the lead driver behind Milwaukee Public Schools' redesigned literacy curriculum in 2015.

"The goal is to improve teacher practice so students are making gains in reading," said Deb Kuether, MPS director of literacy.

"We are moving toward getting our readers to where they need to be."

Sixteen percent of Milwaukee third-graders read at a proficient or advanced level, according to the Milwaukee Succeeds Milestone Report. The partnership's third-grade reading networks, comprised of 75 organizations, were tasked early on with identifying the root causes of the city's low third-grade reading proficiency. They looked at the issue from various angles: in school, outside of school and at home. As multiple factors led to the poor outcomes, they determined multiple solutions would be needed to address them.

"We believe that focusing primarily on third-grade reading proficiency will produce the greatest long-term results for Milwaukee students," said John Schlifske, chairman and CEO of Northwestern Mutual and co-chair of Milwaukee Succeeds. "Third-grade reading proficiency is a key indicator of high school graduation rates, and today, more than 80 percent of Milwaukee third-graders are not proficient in reading."

TRI took root in 2014 at MPS's Gwen T. Jackson Early Childhood and Elementary School, thanks to funding from Northwestern



Transformative Reading Instruction is a new approach in Milwaukee to closing the literacy gap that combines tutoring, teacher coaching and parent engagement to help strengthen the city's readers.

Mutual. It centered on providing teachers intensive in-classroom coaching and support to improve how they teach reading.

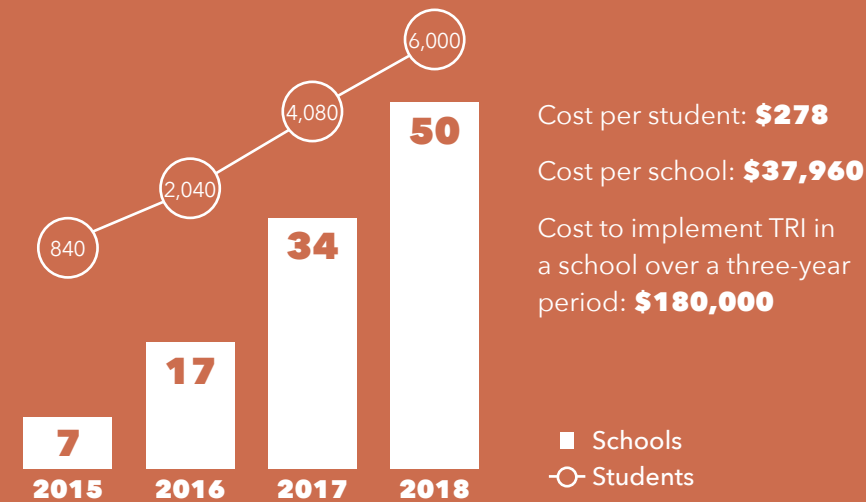
"The range of things teachers have to field in a given day – both on content and behavior – is just enormous," said Mary Schmidt, a literacy specialist and the architect behind TRI.

Coaches are in the classroom about 20 hours each week, observing teachers, providing instant feedback and better positioning them to address those challenges, Schmidt said. As teachers and students gain mastery in reading skills, the coaching decreases.



With the new model, Milwaukee Academy of Science students are making great gains in their reading skills in a short period of time.

EXPANDING THE LITERACY MODEL IN MILWAUKEE



You can help expand the model into more schools by making a gift to the Milwaukee Succeeds Funders Collaborative Fund. Contact **Audrey Borland**, Milwaukee Succeeds school success project manager, at 414.324.8942 or aborland@milwaukesucceeds.org, for more information.

Kindergarteners have shown the most gains. In December 2014, 97 percent of participating kindergarteners were assessed as being in the highest risk category. Six months later, 30 percent were.

Students have shown increased confidence in reading and more interest in it overall. One kindergartener at Forest Home Avenue School, after beating his previous score on a timed test, proudly exclaimed, “I’m really getting smarter and smarter!”

Teachers, some of whom initially were hesitant to try something new, have felt more confident teaching struggling students because of the resources and coaching provided.

Organizers say teacher support is the most compelling piece of evidence. Through a program evaluation and a standing-room only presentation of the model in late fall, teachers and administrators sang its praises.

If not for the program, I’d still be struggling, one teacher said.

Students have retained information from the prior school year, which makes my job easier; I’m not playing catch up, another said.

Coaching is the model’s cornerstone, but other elements are just as critical.

“Learning literacy is a very holistic activity,” said Rachel Lander, an

associate scientist at University of Wisconsin-Milwaukee who is evaluating the model. “It’s not enough to just do things in the classroom.”

Tutoring provides struggling students extra one-on-one support. At MAS, trained volunteers through the Wisconsin Reading Corps provide daily, 20-minute sessions with students who are below their grade level in reading. Citywide, the program has tutored 319 students since mid-September 2015. When it began, none of those students were reading at grade level; a few months later 12 percent were.

A website called Read to Succeed Adventures identifies specific

experiences families can access, like trips to the Milwaukee Public Museum, to continue building a love for literacy. School and community workshops provide parents tips on how to reinforce the new skills their children are learning.

The challenge remains in scaling the model. Milwaukee Succeeds plans to gradually expand TRI so by 2018 it is in place in 50 schools and reaching 6,000 kindergarten through second-graders. Organizers consider what elements of the model are already in place at a school before introducing TRI. Each component is continuously monitored. A TRI team at each school reviews the data monthly and makes tweaks when necessary.

“They really have set us up on a trajectory that is going to be successful,” Penvose said.



Literacy & Learning

ignite donor's passion

As Marie Weiss's late husband, Bernie, liked to say, theirs was a love formed by vowels and consonants.

A love for learning and literacy shaped their careers and their relationship. Both majored in education and started careers in the classroom – Marie teaching first-graders how to read and Bernie serving as a middle school English teacher. They met while working at Milwaukee Public Schools and later reconnected at an education conference. Bernie's career trajectory as a school superintendent took them to multiple states over the years. With a Ph.D. in reading, Marie worked as a university professor and later in education at the state level.

Their mutual passion also shapes their philanthropy, which Marie now shepherds after Bernie's death in 2010 following a seven-year battle with cancer. At the heart of their giving is providing people the same kind of opportunities that the couple enjoyed.

"If you are that fortunate, you have a responsibility," Marie said. "Our major goal is to give back."

While Bernie was sick, the two discussed creating a fund to help avoid paying estate taxes. Marie described it as "an investment strategy that also had a good purpose." She

created a donor advised fund with proceeds from his annuity policies.

The couple knew in general what they wanted to support, namely education and music. But she credits the Foundation and her philanthropic adviser, Marybeth Budisch, for teaching her the ABCs of maximizing grantmaking in those areas.

"There is so much good happening and you kind of open the door (to those opportunities)," said Weiss, who views her grants as seed money. "This fund alone is not going to alter the environment, but I would hope as it touches the lives of whomever the individuals are, it can make a difference."

She's been introduced to giving opportunities like the Southeast Wisconsin Festival of Books, an annual communitywide event organized by the University of Wisconsin-Waukesha that celebrates literacy. She's also learned of and supported Next Door Foundation's home school lit kits, which are backpacks sent home with kids each month filled with books and literacy activities.

"She is the consummate coinvestor," Budisch said. "Given her background, it's no surprise Marie loves learning about new opportunities to give and is

open to supporting a variety of different programs that better our community."

In many ways, the fund has concentrated its investments in outreach programs that marry music and education, like the Florentine Opera's Opera in Schools program and the Milwaukee Symphony Orchestra's Arts in Community Education programs.

To support education at a higher level, Weiss transferred money in 2011 from the donor advised fund to create a designated scholarship fund to support graduate students at Wayne State University, Bernie's alma mater. It provides two \$4,000 scholarships for students pursuing educational administration and linguistics and reading.

The Foundation has opened the door to new possibilities for investing from the fund, but also has opened Marie's eyes to new ways to invest her time and passion, like Literacy Services of Wisconsin. She started as a tutor with its flagship program and now serves on its development committee and board.

Her lifelong passion is evident, said executive director Ginger Duiven, especially considering she is a tutor for the agency's most rigorous program, an evidence-



Marie spends her Tuesday mornings at Literacy Services, helping its adult clients learn to read, many of whom are doing so for the first time.

based reading program for adults with learning disabilities that requires the highest level of specialized training.

"She has a deep knowledge, appreciation and understanding of the complexity of learning to read and the issues adults can face as they try to master that complex skill," Duiven said. "She brings a very positive attitude to everything else she engages in."



To learn about nonprofits that align with your interest areas, contact Philanthropic Adviser **Marybeth Budisch** at 414.336.7068 or mbudisch@greatermilwaukeefoundation.org.

3 WAYS

we are making an impact in education

Funders' Collaborative

The Greater Milwaukee Foundation convened a group of five local philanthropic partners to form the Milwaukee Succeeds Funders' Collaborative, which will pool resources to support and scale strategies that ensure success for every child, in every school, cradle to career. As part of that, the Foundation made a new, \$1 million commitment to Milwaukee Succeeds over the next five years.

Wisconsin Reading Corps

The Foundation worked closely with key legislators and Gov. Scott Walker's office to identify new resources to support Wisconsin Reading Corps, an evidence-based reading program that has secured 15 AmeriCorps workers who work one-on-one with students in eight area schools. The Foundation will continue to elevate awareness of the proven program and seek help from public and private sector partners to take proven efforts to scale.

Public Policy Forum

Together with Northwestern Mutual Foundation, the Foundation provided funding to help the Public Policy Forum, the region's nonpartisan research organization, to expand its capacity to conduct educational research. With such support, it produced two reports on the region's educational landscape, which can be found at publicpolicyforum.org/research/what-milwaukee-k-12-school-system.

Education has been a longstanding passion of the Greater Milwaukee Foundation and our donors. Throughout a century of service in the community, we've invested in thousands of programs to support the educational journeys of children, from cradle to career.

2015 Education Grantmaking

Total investment in strengthening education

\$6,537,000

Total investment in scholarships

\$2,772,308

VITAL SIGNS: EDUCATION

Seventy-five quality of life indicators. Sixteen regions. One goal: How does metro Milwaukee stack up?

That's the premise behind Vital Signs, a biennial report the Greater Milwaukee Foundation originally commissioned in 2013 and updated in 2015. It provides a glimpse of how metro Milwaukee fares compared to 15 other regions based upon a varied set of quality of life indicators.

Specific to education, the region ranks high – first actually – in terms of individuals enrolled in college and graduate school.

"The fact that we rank first as a region – more than Chicago, more than the Twin Cities – is something to celebrate," said Marcus White, the Foundation's vice president of civic engagement. "The trick is: How do we hold on to these people?"

Yet the region suffers from brain drain, as graduates often take their degrees and talent elsewhere. Nor is it attracting enough new talent, which poses a challenge for maintaining a competitive workforce.

One of metro Milwaukee's more promising educational indicators is the declining high school dropout rate. The rate has been dropping since 2010, and Milwaukee has the third lowest rate among the 16 regions.

White said Vital Signs provides a starting point for policymakers, philanthropists and business leaders to discuss how we, as a community, can improve our region or build upon the successes already in place.

High school attendance

- The dropout rate in our region has improved significantly from nearly 5% to 3.02% in just 4 years

3.02%

Higher education enrollment

- The region ranks first for enrollment in college or graduate school per 1,000 (77.6)
- 99,888 persons enrolled in college
- 21,951 persons enrolled in graduate or professional school

1st

Brain drain

- The region ranks 15th (second to last) in the number of new residents age 25 and older with a bachelor's degree

15th

Visit greatermilwaukeefoundation.org/vs for the full report. To schedule a briefing for your organization, contact **Marcus White**, vice president of Civic Engagement, at 414.336.7026 or mwhite@greatermilwaukeefoundation.org.



Milwaukee Succeeds MILESTONE REPORT

The region as a whole fares well in education, but the city of Milwaukee itself faces a number of challenges.

- Only 12% of children in families receiving childcare subsidies are in highly-rated centers
- Only 16% of Milwaukee third-graders read at a proficient level
- 18% of students met the ACT benchmarks in 3 or 4 subjects

Visit milwaueesucceeds.org/milestone for the full report.



Making Milwaukee MORE ACCESSIBLE

Anyone can become a member of the world's largest minority group.

Whether by accident, disease or old age, we'll all have a disability at some point. The Americans with Disabilities Act has led to advancements over the last 25 years, but those haven't necessarily provided greater opportunities, particularly in helping people stay active and healthy.

The Ability Center is looking to change that.

The proposed \$40 million fitness, athletic and recreation facility is the brainchild of Damian Buchman, a two-time osteosarcoma survivor who has undergone 22 major knee surgeries since his first diagnosis at age 13. The former sports facility manager, adaptive athlete and visionary in chief has been building a movement to make the dream

of the center's universal design a reality.

More than 190,000 people with disabilities live in southeastern Wisconsin. While sports and fitness facilities might accommodate them, most are not designed to meet their needs, he said.

The 230,000-square-foot building is designed to be fully accessible, with details including extra-wide sidelines, a zero-depth pool

entrance and high-contrast color schemes for the visually impaired. Adaptive programming, like wheelchair basketball, will be offered along with able-bodied programming, like Zumba. It also will host tournaments for adaptive and able-bodied athletes.

The idea won Marquette University's 2011 Social Innovation business plan competition. A 2014 feasibility study, supported by a Greater Milwaukee Foundation

grant, validated the center's need and estimated a \$15.2 million annual impact on the local economy.

Buchman has championed the effort since 2009, viewing it as a way to give back to honor his survivorship.

"When you believe you are alive to do something of this magnitude, failure is not an option," he said.

While that process unfolds, he is dedicating additional time,

energy and passion to opening up other opportunities for people with disabilities.

"We decided let's make things more accessible for a conversation about the need for The Ability Center," Buchman said.

His latest initiative, called RampUpMKE, partners with Milwaukee County Parks to make recreational opportunities more accessible. The first two events have raised thousands of dollars to help purchase adaptive equipment like beach accessible wheelchairs at Bradford Beach and specially designed ice skating sleds for Red Arrow Park.

FUNDING NEEDS:

\$100 supports one square foot of The Ability Center facility

\$1,500 covers cost of ice skating sleds

\$2,000 covers cost of adaptive equipment for kayaking

\$2,400 supports average cost of adaptive athletic equipment

\$2,500 purchases a beach accessible wheelchair or handcycle

INTERESTED IN INVESTING IN THIS PROJECT?

Contact **Tori Johnson**

at tjohnson@greatermilwaukeefoundation.org or 414.336.7061 to make a gift from your fund.

You also can give online at tacwi.org.



REFLECTING ON A CENTURY

Donor finds enjoyment in engaging
in the community

Chances are it's not just one thing that has led to Richard Franz's longevity. It could be his daily routine, which includes lifting weights, not overindulging at meals, and treating himself to a bottle of New Glarus Spotted Cow each afternoon. It could be his copious amounts of reading. The New Berlin bibliophile estimates he reads about four or five books each week.

Ask the centenarian his secret, though, and he doesn't skip a beat.

"Always learning, every instant of the day," says Franz, who shares a birth year with the Greater Milwaukee Foundation.

He considers it his passion and something that hasn't slowed down as he has gotten older. Too old to him, by the way, is anyone over age 75. He planned his own "going away party" at age 95.

Franz was born in Milwaukee and grew up in the Lindsay Heights neighborhood, where his parents owned a corner grocery store. After studying graphic design at the Milwaukee State Teachers College, he opened his own business in the Cawker Building downtown, which he ran for more than 20 years. He later went to work for Waukesha County as a cartographer, a skill he acquired while stationed in Portland, Ore., as part of the U.S. Army Corps of Engineers during World War II.

He and his wife, Maxine, a former school teacher, devoted many years to protecting the environment. They co-founded the Ecology Association of New Berlin. She passed away in 1991. He also has outlived his son, Erich, and his daughter, Emily.

One of the ways he continues learning is through the designated fund he started at the Foundation in 1994 when he was just an octogenarian. It benefits the Urban Ecology Center and SHARP Literacy.

"As I think back to all the years I have known you, your assistance has been very invaluable," he said.

Franz doesn't simply invest in the programs. He engages in them.

He visited a second-grade classroom to see SHARP Literacy's educational programming in action. He stopped by the Milwaukee Rotary Centennial Arboretum, located a half hour from his house, after reading about it in the news. He toured Urban Ecology Center's three campuses, joining a group of

third-graders in sampling maple syrup on one visit and chatting with high school participants in the center's outdoor leader program on another trip.

"He has a better sense of what we do than many," said Ken Leinbach, its executive director, who arranged a canoe trip for Franz down the Milwaukee River to celebrate his 99th birthday.

The excursion, Franz's idea, took him past his old office. It was such a great adventure that he signed up again for the opportunity last July to toast his 100th birthday.

A century old, Franz hasn't slowed down. He continues to live in the home he's owned for the past 60 years and is considering volunteering at his church.

"He's amazing," Leinbach said.



Photo by Becca Mader

How do you celebrate 100 years? Richard Franz decided to take the ride of a lifetime – a trip down the Milwaukee River – courtesy of his friends at the Urban Ecology Center.



To discuss your philanthropic passion or to start a fund, contact **Tim Larson**, our vice president of Philanthropic Services, at 414.336.7065 or tlarson@greatermilwaukeefoundation.org.

GIFT of RENTAL PROPERTY

paves the way to philanthropy for Mequon couple



Wendy and Steve Lewensohn

“Not only are you going to be helping organizations, but it is positive as far as helping your estate planning.”

-Steve Lewensohn

For 40 years, the two-story duplex with maize colored siding and sage green trim on Milwaukee’s upper east side served as a solid investment for Wendy and Steve Lewensohn. It was one of a number of rental properties they owned and, for a brief time while still newlyweds, it was a place they called home. Earlier this year, the Mequon couple decided to sell the property, which lies two blocks from the University of Wisconsin-Milwaukee and a stone’s throw from Riverside Park. In July, when they closed the door for the final time to the 105-year-old building, they opened up a whole new chapter – as philanthropists.

They did so by donating the property to the Greater Milwaukee Foundation, which in turn sold it, allowing the Lewensohns to take a charitable deduction and avoid capital gains taxes. They used the proceeds from the sale to create a donor advised fund.

Though not a particularly common giving option, it is one worth exploring, said Mary Kay Mark, the Foundation’s director of gift planning. She noted that donors are offered a charitable deduction for the fair market value of the property, as valued by an appraisal.

“Not only are you going to be helping organizations, but it is positive as far as helping your estate planning,” said Steve, a retired mortgage banker.

The Lewensohns decided to donate the duplex following discussions with their CPA and attorney. They then signed a memorandum of understanding with the Foundation, which stated the steps each party would take in the process.

A five-member gift acceptance committee made up of Foundation board and staff ultimately decides whether to

accept such a real estate gift, Mark said.

“Each property is unique, and there’s a lot of careful analysis and evaluation,” Mark said.

It proved to be a rather quick and simple process. The Foundation put the property on the market in early May and it sold within two weeks. Its location, charming details – including hardwood floors, leaded glass windows and original pear wood cabinetry – and overall condition contributed toward the quick sale.

The gift deepens their relationship with the Foundation, one that stretches back to 2006 when they first included it in their estate plan. They made their first round of grants to five different organizations in September.

“We’ve always been on the same page with regard to charitable giving, and now we have the opportunity,” Steve said.

Contact **Mary Kay Mark**, our director of gift planning, at 414.336.7066 or mkmark@greatermilwaukeefoundation.org, to explore your options for giving.





Beyond the will in estate planning

by **MICHAEL G. MAY**

May is an estate planning attorney in Mequon, Wisconsin.

In the past, getting one's affairs in order meant hiring a lawyer to prepare a will. To some degree, it still does, because a will allows the administration of an estate to be overseen and protected by the court system. But the job does not end there, because many assets never pass through the will. They may include:

- Individual retirement accounts, 401(k) and profit-sharing plans, life insurance, and other assets that pass by beneficiary designation;
- Property owned jointly with right of survivorship; and
- Cash and brokerage accounts made "payable on death" to others.

By coordinating your will with beneficiary and title designations, you can achieve what I call the

three Rs: Getting the Right property, to the Right people, at the Right time. A failure to consider these designations may cause some loved ones to inherit more than intended, and others less—or even result in disinheriting someone.

There is a second reason to look outside the will when preparing end-of-life documents. For many of us, incapacity will precede our death. During that time, a court-appointed guardian may be required to make health and financial decisions. The red tape of guardianship can be avoided with documents called powers of attorney, which name a trusted person to act on the signer's behalf. Every adult should have them.

I often see estate planning delayed until an unexpected event

forces decisions to be made. End-of-life documents should be prepared before an illness or crisis makes them necessary. The human tendency to procrastinate can result in (1) state law dictating who receives your estate and in what proportions, (2) rushed documents that do not reflect your intent, or (3) inability to sign documents due to lack of capacity.

Make it a resolution to review your documents.

Let us be your charitable planning resource. Contact **Mary Kay Mark**, our director of gift planning, at mkmark@greatermilwaukeefoundation.org or 414.336.7066, about how you can start on your path to philanthropy.



William S. Martin

Whether working for former Wisconsin Gov. Tommy Thompson or on his own as president of consulting firm Jericho Resources, Inc., William S. Martin has devoted the past 25 years to helping bridge public and private partners to solve social issues. He views his work as an extension of the values his family embraced for generations. Martin, president of the Association of Fundraising Professionals - Southeastern Wisconsin Chapter, started his donor advised fund in summer 2015 with proceeds from the sale of a building he once owned in downtown Cudahy. Here's why - in his own words.

What does philanthropy mean to you?

Giving out of joy.

What causes are you most passionate about?

I worry about cities like Milwaukee, where we have such a divide in terms of resources and opportunity. I'm very passionate about diversity and inclusion. If we are going to be a healthy community, we have to find ways for all boats to be lifted.

Why the Greater Milwaukee Foundation?

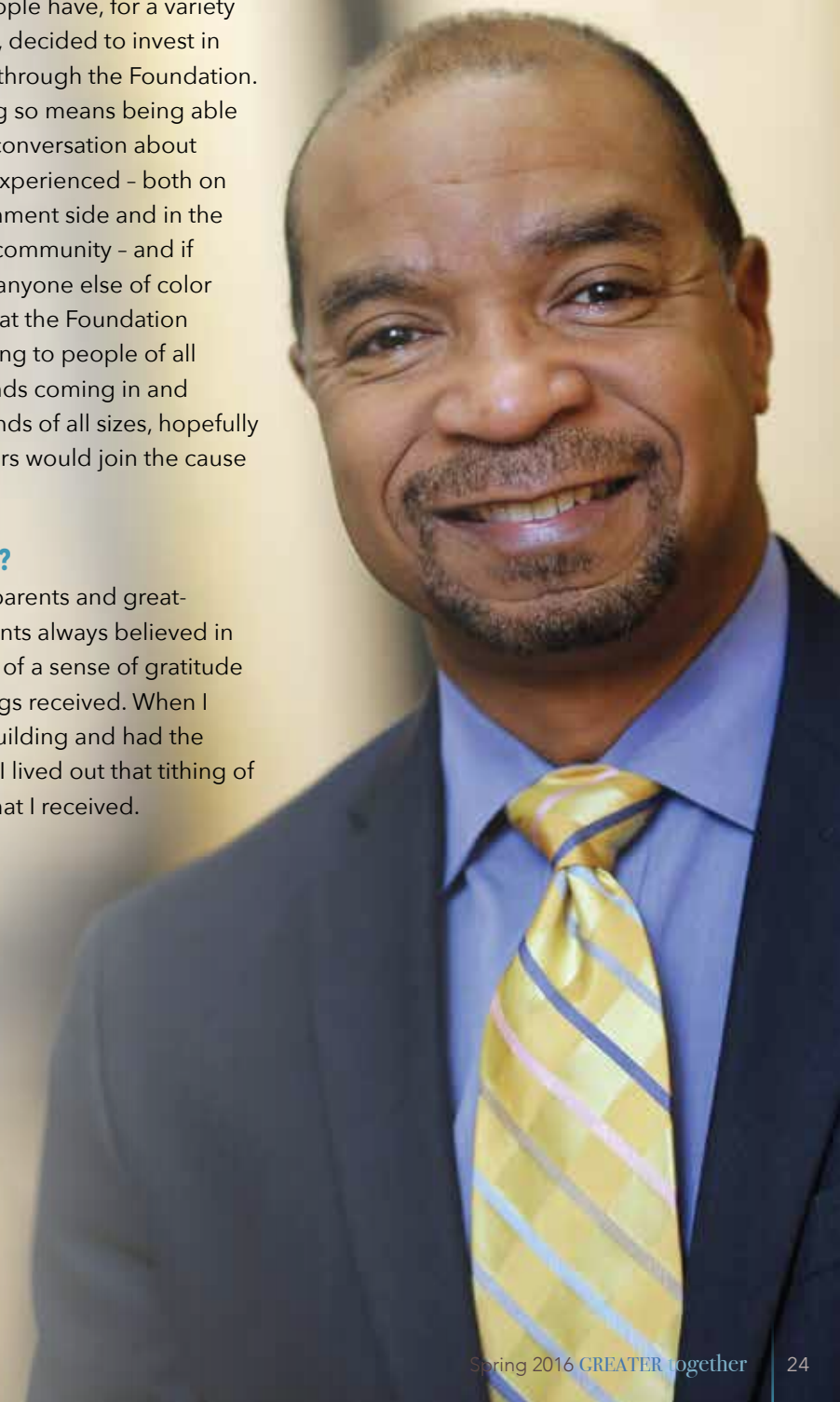
The Foundation gets folks together who have like minds

about particular causes. I want to make sure I'm part of those conversations, and I want to be one of those people investing in the solutions.

Lots of people have, for a variety of reasons, decided to invest in the future through the Foundation. If my doing so means being able to have a conversation about what I've experienced - both on the government side and in the nonprofit community - and if it inspires anyone else of color to know that the Foundation is welcoming to people of all backgrounds coming in and starting funds of all sizes, hopefully some others would join the cause as well.

Why now?

My grandparents and great-grandparents always believed in tithing out of a sense of gratitude for blessings received. When I sold the building and had the proceeds, I lived out that tithing of sharing what I received.



ARTIST STATEMENT

To call Anne Kingsbury's art a labor of love would be quite the understatement. The 72-year-old visual artist has worked meticulously on hand-beading text and images onto a deer hide over the past 20 years. The piece chronicles daily activities, a testament to the small things that form the major part of our lives. One thing not included - but a noteworthy piece of her 50-year history as an artist - is the Mary L. Nohl Fellowship she won in 2014. "It is nice to have that commitment

seen and said 'this is interesting; we are happy you are doing this,'" Kingsbury said. "That is a really important thing."

Since 2003, the Mary L. Nohl Fund Fellowships for Individual Artists Program has recognized work of longstanding artists like Kingsbury, introduced new artists to the community and, more importantly, put Milwaukee's art community more firmly on the map.

"The Nohl really is something other cities should aspire to," said

Daniel Fuller, curator at the Atlanta Contemporary Art Center and a 2014 juror.

The program has garnered praise and prestige for its support of individual artists as well as the way it is structured by offering an exhibition, catalogue, monetary award and critical exposure for emerging and established artists to outside curators. Nearly 90 fellowships, for a total of \$745,000, have been awarded to individual artists ranging from painters to filmmakers,

recent college graduates to septuagenarians.

A \$9.6 million bequest left by Milwaukee artist Mary Nohl to the Greater Milwaukee Foundation in 2001 got the conversation started. Her creative spirit and the need in the community at the time were big influences on the program's development.

Nohl requested her gift support visual arts and arts education, but did not mention a fellowship program. Yet, at the time, support for artists through the National

Endowment for the Arts and other entities had ceased. Many couldn't sustain their work and were leaving town, said Polly Morris, who has led the program from its inception.

The Foundation had administered Milwaukee County's short-lived individual



(Top) Anne Kingsbury, 2014 Mary Nohl Fellow; (left) Milwaukee artist Mary L. Nohl, photo by Ron Byers

fellowship program and viewed Nohl's gift as a chance to build on that experience and expand its support for artists.

Each year, three jurors, representing different regions and disciplines, visit Milwaukee. The first day they pore over about 150 applications and, through a blind juried process, narrow the field to seven established and 10 emerging finalists. The next day, they visit artists' studios. Emerging artists receive \$10,000, and established receive \$20,000. An exhibition of their work is held the following year.

"Part of what keeps a place like Milwaukee vital is supporting people at different places along the continuum," Morris said.

The fellowship, for which Kingsbury has applied nearly every year since it started, has made it easier for her to continue her decades-long project. Throughout the three-month exhibition, which was at INOVA on Milwaukee's east side, Kingsbury worked on the deer hide at the gallery. She used her award to convert space in her home to a studio.

It's as thrilling for Kingsbury as it is for Jenna Knapp, who graduated from Milwaukee Institute of Art and Design and won in 2014. Knapp used her fellowship to start a conversation. The New Glarus native became involved in the Black Lives Matter movement in Milwaukee in fall 2014, shortly after winning the award. That



Tyanna J. Buie, *Unveiled*, screen-print painting, glitter, 2012.

heavily influenced her work for the Nohl exhibition, which examined how race is portrayed in the media.

"I learned how much of a privilege it is to be an artist and have a voice and to be able to use that platform," Knapp said.

Though emerging artists don't receive studio visits, their work is included alongside established artists in the exhibition and catalogue. Morris collaborates regularly with other area institutions to make sure current and past fellows receive visits

“Part of what keeps a place like Milwaukee vital is supporting people at different places along the continuum.”

-Polly Morris program coordinator

when visiting curators and artists come to town. Providing that same level of exposure makes Milwaukee's program unique, Fuller said.

The fellows credit the use of outside jurors as lending credibility to the program. Tyanna Buie, who moved from Chicago to Milwaukee in 2011, says curators and gallery owners started taking notice when she won the award in 2012.

Several artists, like Peter Barrickman, have grown along with the program. He was recognized as emerging in 2003 and established in 2009. As a young, struggling artist, he said the first win provided important affirmation. The second award provided him a solid future. He was out of a job, in need of money and looking to transition into teaching. He credits the fellowship with elevating his name and work.

"I was a local resource they didn't know," said the painter and MIAD professor.

The program also exposes jurors to new opportunities. Lisa Dent, a 2012 juror, works for Creative Capital, an organization that provides artists resources and financial support. She met many new artists who would qualify for her company's support through the program. Fuller had never visited Milwaukee before 2014. Thanks to the program, he's returned four times in less than a year. On one occasion, he made nine studio visits.

Even with the program, retaining artists remains difficult. Twenty-five fellows, including Buie, have moved away since 2003. She moved to Detroit last summer for a full-time teaching opportunity.

Yet, just like jurors, fellows can serve as ambassadors for Milwaukee's artist community, Morris said.



While in Milwaukee, Tyanna Buie worked to inspire future artists through work with Artists Working in Education's Truck Studio art program.

"If not for Mary Nohl, nobody in Milwaukee would have cared as much," said Buie, a screenprinter. "I'm not just going to move to Detroit and forget where I came from. Why not bridge the two?"

Have art, will travel

While the Mary L. Nohl Fund Fellowships for Individual Artists Program was designed to help artists stay in Milwaukee, its Suitcase Export Fund provides financial support so they can take their art around the country or the world. Funding, distributed twice a year, supports transportation of the work and of the artists.

Nearly \$139,000 has been awarded to 242 individual artists and nine duos since 2003, taking them to places as close to home as Madison and Kenosha and as far away as São Paulo, Brazil and Gujarat, India.





EMIL BLATZ FUND

For many years in Brew City, Blatz was “Milwaukee’s Finest Beer” and Emil Blatz, traveling auditor and son of the brewery’s owner, was one of Milwaukee’s finest philanthropists.

His most visible legacy is that of the Blatz Temple of Music, an Art Deco-style band shell in Washington Park that opened in 1938, thanks to his \$100,000 gift. Over the past 50 years, his most powerful legacy got its start from 16 words in his will.

Blatz, who died in 1944 at age 86, directed \$100,000 to the then

Milwaukee Foundation, “the income from which shall be used in purchasing scholarships for worthy young men and women.” His generosity created the Foundation’s first scholarship fund. Its assets are now five times larger than the original gift, and it has awarded more than \$757,000 in scholarships.

We’d like to think Blatz is toasting the Foundation’s good investment practices. Perhaps a few scholars are raising a glass in honor of his generosity, too.

Photos courtesy of the Milwaukee County Historical Society

Donor Snapshot

MEQUON NATURE PRESERVE

Tiny piece of Wisconsin paradise serves as couple’s living legacy

Pat Wilmeth was simply nuts about nature. Harvey Wilmeth was more of a practical academic. Together, throughout their 60-year marriage, the couple shared a value of preservation.

Their passion for each other and the environment lives on in perpetuity as part of the Mequon Nature Preserve. Harvey’s Woods and Pat’s Pond, a beautiful marriage of forest and pond’s edge, pays tribute to the couple’s conservation beliefs.

A grant from the Patricia Smith Wilmeth Fund renamed the 7.5-acre beech-maple forest, one of Pat’s favorite destinations, in Harvey’s honor after his death in 2007. Another grant planted the seeds for an endowment so the agency could continue restoring what director Kristin Gies described as “a tiny piece of Wisconsin paradise.” Following Pat’s death in 2013, daughters Sally and Kim named an ephemeral pond after their mother’s penchant for ponds.

Both serve as destinations for solace and solitude the entire community can enjoy, but even more so the Wilmeth family.



CIVIC CENTERPIECES are the heart of the community

(L) Cory Gritzmacher, West Bend parks project manager, and (R) Greg Berg, La Rosa Landscape Company, at Old Settlers Park in West Bend

Discovering new music on a warm summer night. Feasting on fresh produce at a local farmer’s market. Taking a long leisurely stroll along the lake. More often than not, what serves as back drops to these memories are civic centerpieces.

In 2016, destinations in West Bend, Oconomowoc, and Cedarburg will undergo transformations, thanks to the collaboration and generosity of the Greater Milwaukee Foundation and its three regional partner foundations. The Foundation made \$200,000 investments in each community

in 2015 as part of its centennial year to support the projects.

In summer, new life will come to Old Settlers Park, a less than one acre hub on Main Street in downtown West Bend that draws in residents with its farmer’s market and weekly Music on Main series. The West Bend Community Foundation is spearheading the project, which includes replacing the former gazebo with a new shelter three times its size, installing accessible ramps, new sidewalks and landscaping.

As early as this fall, reconstruction of downtown Oconomowoc’s

boardwalk will begin. A partnership with the Oconomowoc Area Foundation and city will upgrade the popular 250-foot pathway along Fowler Lake as well as rebuild a small gazebo nearby.

Cedar Creek Park, long a cultural hot spot in Cedarburg and home to the popular Summer Sounds concert series, will unveil a new limestone pavilion in summer. The project, in partnership with the Greater Cedarburg Foundation and Cedarburg-Grafton Rotary Club, replaces a 50-year-old band shell.

 facebook.com/GreaterMilwaukeeFoundation

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THANK YOU Greater Milwaukee!

The Greater Milwaukee Foundation was honored to commemorate its centennial in 2015 by providing access and special opportunities for everyone in the community to experience the many cultural gems that contribute to metro Milwaukee's quality of life.

Through special Gifts to the Community, the Foundation had a chance to say thank you to the community for 100 years of generosity. In return, 275,000 people were able to get out and explore all that our region has to offer – from art museums to a multicultural festival to Asa, the newest resident at the Milwaukee County Zoo.