

Greater Together



2009 Annual Report  
Greater Milwaukee Foundation

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Greater Together Greater Together

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## Our Mission

Strengthening Communities through Effective Partnerships

*is driven by our core values*

Integrity, effectiveness, respect, transparency, innovation, diversity, equity, inclusiveness, collaboration

*to create a vision of the Foundation as*

An effective partner that develops, supports and advocates for projects, programs and policy changes that strengthen communities, in measurable and sustainable ways.

*a philanthropic leader and partner with the community.*

To help our donors grow their philanthropy in support of the organizations and causes important to them;

To address critical community needs as an active grantmaker and convener; and

To advocate for change to better serve people and their communities.

Donor profile

*Ziegler Family Foundation Fund*



## Generations of generosity

The Ziegler roots run deep in West Bend; Doug Ziegler's grandfather was Washington County treasurer at the turn of the last century. Doug and Sharon Ziegler's passion for giving runs deep as well. For more than 30 years their charitable partnership has benefited dozens of nonprofit organizations in the West Bend area and their scholarships have helped hundreds of students fulfill their dreams.

"This is our 60th year of scholarships through The Ziegler Family Foundation, and during that time we've had 250 scholars," Doug Ziegler explains. "Education is our biggest area of interest, especially scholarships. We've provided more than \$12 million in scholarships to students over the years. It's important to keep up those scholarships. Unless students have a good education, they won't be the kind of leaders they could be."

The Ziegler Family Foundation Fund, which is affiliated with the West Bend Community Foundation, grew from the Ziegler Foundation, which Doug's father established in 1944. It was the family's way to give back to the community where the businesses started by the family – BC Ziegler & Company and the West Bend Company – were thriving.

Sharon Ziegler grew up in Iowa where her own family's principled tradition of giving whatever you had to give was honored. It continued when

she married Doug 31 years ago and moved to West Bend.

"Having the opportunity to give and serve is what I really enjoy," Sharon explained. "When you see the success of projects you've helped with serving the needs of the community, it's wonderful. Giving is such a great reward."

Doug and Sharon's giving extends beyond their own foundation. Doug, along with his friend the late Cliff Nelson, was one of the co-founders and first president of the West Bend Community Foundation in 1999. Doug Ziegler's generous \$1 million gift, matched by Cliff Nelson, provided the seed money that started the West Bend Community Foundation. Sharon Ziegler is the current president of the West Bend Community Foundation Board. Both Sharon and Doug remain actively involved on many community boards in West Bend and the greater Milwaukee area. And now the next generation of Zieglers is also becoming actively engaged in the family foundation as well as their own giving.

"Our family is our real joy," Doug explained. "They've all turned out to be good people."

"We feel lucky and blessed," Sharon said with a smile. "We do count our blessings."

When many people in West Bend count their blessings, they count Sharon and Doug Ziegler.

# Grantee profile

## *Healthy Neighborhoods*



## Layton Boulevard West: Building on positive momentum

Children playing outside in the summer until bedtime . . . people sitting on their porches and talking to neighbors . . . homeowners gardening, painting or working on other home improvements.

These are scenes from today's Layton Boulevard West Neighborhood, where significant investment by the funds of the Greater Milwaukee Foundation through its Milwaukee Healthy Neighborhoods Initiative has helped reverse years of decline and develop positive momentum.

The Milwaukee Healthy Neighborhoods Initiative, a collaborative effort between the Foundation, the city of Milwaukee and local neighborhoods, seeks to revitalize Milwaukee communities that are at a tipping point. Nine neighborhoods, including Layton Boulevard West, are partners in the program, which focuses on an area's positive attributes. Fortunately, Layton Boulevard West — which is actually three neighborhoods, Silver City, Burnham Park and Layton Park — has many assets on which to build. It is one of Milwaukee's most diverse and densely populated South Side neighborhoods, with eight different languages spoken, a variety of ethnic restaurants and shops, and beautiful historic homes, including many architectural gems in the Arts and Crafts style.

Layton Boulevard West Neighbors has implemented 11 improvement projects, including solar-powered light poles, alley and landscape

lights, front yard landscaping and cleanups of foreclosed homes. Through these projects, neighbors have not only beautified their blocks but also created and enhanced a shared sense of community, thus improving the neighborhood's security. These projects have been supported by small, curb appeal grants that require neighbors to work together deciding how to use them and then carrying out the project.

LBWN is also organizing new block clubs, informing realtors about special incentives for homebuyers, conducting workshops for interested homebuyers on how to purchase and fix up a foreclosed home, organizing an annual Tour of Neighborhood Homes for Sale, and distributing grants for home improvements, including energy-efficiency upgrades.

All of this activity is attracting enthusiastic new retailers and residents. Two of them are Kimberly Kowalczyk and her husband, Nick Bragg, a young couple who bought Kimberly's grandparents' house on South 30th Street, an attractive bungalow filled with stained glass and beautiful woodwork. The couple has been modernizing the home while staying true to its Arts and Crafts style.

"The diverse mix here really excites my husband and me," she said. "Everyone on our block is friendly and family oriented, and takes pride in their homes and yards. We know we belong here."



Grantee profile  
*Free Clinics*





## Foundation support strengthens medical safety net for working poor, uninsured

In a time of increasing health care costs and record job losses, there may not be much to smile about.

But within the past year, the Waukesha County Community Dental Clinic has changed that outlook for nearly 5,000 people. The six-chair clinic is the first and only one of its kind in the county dedicated solely to serving the low-income and uninsured. Run like a private practice, the clinic requires patients to schedule appointments and pay, though fees do not exceed \$20 per visit. It averages 400 appointments per month.

It is just one of nearly 50 free or no-cost medical clinics in metro Milwaukee providing a safety net for the uninsured and underinsured. The Greater Milwaukee Foundation supported a number of clinics over the past few years as it has increased its grantmaking efforts for basic needs and persistent poverty.

“Without these programs, the demands on emergency rooms and other costly services would be even greater than they are today,” said Jim Marks, the Foundation’s director of grant programs. “It is likely that many people would go without the basic care and treatment they need.”

Through the help of a 10-person staff and a core group of volunteers, the Waukesha County Community Dental Clinic provides basic, comprehensive dental care for children and pregnant women. For adults over age 18, only emergency care is provided. While the clinic would like to extend its hours and services, it is focused on ensuring that the 95 percent of existing clients who need follow-up make a return visit.

In Milwaukee, many free clinics serve as residents’ primary health care resource. Two others funded by the Foundation have seen increasing demand for services. At the Philippine Cultural and Civic Foundation’s clinic in 2009, 493 new patients sought help there, a 10 percent increase over 2008. The free Bread of Healing Clinic, just north of downtown Milwaukee, serves an average of 400 people monthly, the majority of whom work full time and have chronic illnesses but cannot afford health care. The clinic also coordinates the MedShare program, a collaborative effort of 14 Milwaukee-area free clinics that increases access to and lowers the cost of providing medications to low-income people.

Donor profile

*Payton-Price Fund*



## Strengthening Milwaukee's African-American community – one scholarship at a time

Growing up in Milwaukee in the 1950s and 1960s, Shelia Payton remembers how important education was to her family, yet how elusive it was for her neighbors.

Her parents, Gertrude and Mack Payton, both graduated from Alcorn State University, the country's first state-supported college for African-Americans. Both later earned master's degrees in educational psychology and social work, respectively.

In Shelia's northwest side neighborhood, her parents were the only ones who had earned that distinction. Through the Payton-Price Family Fund, a scholarship fund created in 2002 that provides scholarships to African-American students enrolled in historically black colleges and universities, the Paytons hope that will no longer be the case.

"Looking out for others has always been part of our family's way of doing things," said Shelia, who earned a bachelor's degree in journalism at Syracuse University and a master's degree in urban affairs at University of Wisconsin-Milwaukee. "When we looked at everybody who needed help, we saw too many African Americans near the bottom of the socioeconomic ladder."

Although her parents had established a scholarship at their alma mater, the family also wanted to help Milwaukee students. Shelia initially pushed for a

private foundation, but after discovering the time and administrative costs they could save by working with a community foundation, Payton and her parents were convinced otherwise.

"There are other places to put your money, but you often lose control over what happens," said Shelia, who worked in public relations at Miller Brewing and later ran UWM's Minority Entrepreneurship Program. "People at the Foundation really seem to care about your fund, no matter the size."

The Paytons rely on a scholarship committee at Milwaukee's St. Mark's A.M.E. Church to select recipients. While many scholarships target students in the top 10 percent, the Paytons look for students with potential for greatness.

"Many times students considered as average know they have to sacrifice and work a little harder to succeed," said Gertrude, a retired guidance counselor. Mack, a retired probation officer supervisor at Children's Court, passed away in 2007.

Though the Paytons have made annual grants, they still consider the fund in its infancy. Both women have added money annually to build the fund, and Shelia said a portion of her estate will go toward it. Ultimately the family hopes to focus on other issues affecting African Americans including economic self-sufficiency, arts and culture, health education and medical research.

Grantee profile

*Milwaukee Violence Free Zone*



# Violence prevention program changing culture at Milwaukee's toughest high schools

In recent years at Bradley Tech High School, uniformed police officers have become a regular sight. Frequent fights and violent incidents were commonplace.

Since 2008, however, a different type of uniformed individual has been present. Clad in simple red-and-black T-shirts and armed with no more than a walkie-talkie and street smarts, seven young adults, part of the Milwaukee Violence Free Zone Initiative, roam the hallways. Neither hall monitors nor safety aides, their presence nevertheless has led to a 50 percent reduction in nonviolent incidents and a 25 percent decline in violent incidents.

What has contributed to such success? Finding out which students were the most influential — and most disruptive — and winning them over. That change does not happen overnight, but it is slowly happening at eight of Milwaukee's most challenged high schools. The initiative, a community-based youth violence prevention and reduction program run by the Washington D.C.-based Center for Neighborhood Enterprise, acts as the catalyst.

"Everything we do is about relationships — whether it is with the student, parent, teacher, whomever," said Andre Robinson, director of Milwaukee's program. "That's why it works."

The Greater Milwaukee Foundation has given \$200,000 over the past two years to the program, which began at South Division in 2005. The Latino Community Center heads up the program at Bay

View, Bradley Tech, Madison and South Division high schools. Running Rebels oversees the program at Custer, Marshall, North Division and Washington high schools.

Milwaukee is one of five cities using the program, which began in 1997 as a way to stop the violence between rival gangs at a D.C. public housing project. The program has stood out because of its outcomes and its support from the school district. A case study of participating schools conducted by Baylor University in 2009 found that the program helped improve safety, reduce suspensions and truancy and improve academic performance.

"Milwaukee is a demonstration model for us," said Kwame Johnson, director of the National Violence Free Zone Project. "It is the first time we've ever gotten support from the school system and local foundations."

A team of seven youth advisers and a site supervisor work closely with each school's safety aides, teachers, counselors and staff to identify troublesome students, help mediate problems and prevent incidents from occurring. Typically in their early 20s and 30s and from the same neighborhoods or backgrounds as students, youth advisers wear several hats — mediator, mentor, coach and confidante.

"Our past mistakes put us in a position to form relationships with these students," said Jesse Garcia, South Division's site supervisor. "We share some of the same struggles."

Donor profile

*Lindsay Foundation Fund*



## Granddaughter carries on family's legacy of giving in Milwaukee

The Lindsay family has a storied history in Milwaukee. Scotland native Walter Lindsay moved to Milwaukee at age 25 and helped found Lindsay-McMillan Oil Company, Goodwill Industries and the village of River Hills. He served on the boards of Northwestern Mutual Life and Briggs & Stratton and led the Milwaukee Country Club.

But it was the decision Lindsay made in his retirement to create a private family foundation that truly made an impression on his granddaughter, Catherine Mayer.

"I always felt extremely glad that he had been willing to share what he had with those less fortunate," said Mayer. "I liked what that said about him, his concern for the community and other people."

Lindsay started the foundation in 1970 to support agencies that served the "poor, unfortunate and underprivileged" in Wisconsin and the visually impaired. His only daughter and Catherine's mother, Lorna Mayer, helped administer it as he grew older. After Lindsay died in 1975, however, it eventually became too much for Lorna to handle.



Walter and Catherine Lindsay

She transferred the assets to the Greater Milwaukee Foundation in 1994 and created the Catherine and Walter Lindsay Foundation Fund, a donor advised fund.

Catherine became involved before the fund was created, but it wasn't until after her mother passed away in 2002 that she assumed the role of carrying on the family's legacy.

"It feels like a great privilege and a blessing to me to be in a position to be able to do this," said Mayer, a psychiatrist who lives in Hudson and does her grantmaking over the phone with Marybeth Budisch, her donor services officer. "I couldn't do this on my own, that's for sure," said Mayer. "I wouldn't have the time or the knowledge."

The fund has given to a myriad of agencies over the years, based on its original mission. It has also stood out in its willingness to fund new agencies and projects the Foundation has also supported. In fact, it was one of the first funds to do so.

Mayer credits the Foundation with the tremendous impact the fund has had. Since 1994, it has given out more than \$3.6 million in grants, nearly as much money as was in the fund when it was initially started.



Board chair Judy Jorgensen

Board members: Joan M. Prince, David Lubar, Wendy Reed Bosworth and Franklyn M. Gimbel

## Change, challenges and opportunities

Dear Friends,

If you've visited the Greater Milwaukee Foundation's office, you've noticed a series of large banners hanging in our main hallway. The banners alternate between photos of individuals and organizations supported by our grantmaking and these words: Greater Together. That was certainly the case in 2009 as the Foundation, our generous donors and dedicated nonprofits weathered tough times together to provide needed support in communities still struggling under the weight of a weak economy.

The economic recession of 2008 didn't improve in early 2009; it actually worsened before the economy rebounded in the second half of the year. The needs of those impacted by the downturn became more critical as families and individuals previously able to hold their own during tough times reached out for help.

Thanks to our long-term investment philosophy and the continued generosity of our donors, the Foundation was able to meet successfully the challenges 2009 presented.

- Foundation assets climbed 21 percent in 2009 to \$519 million. Our diversified investment philosophy positioned the Foundation to take advantage of the market recovery that took place in the later part of 2009. Foundation investments continue to show strong returns, outperforming both the Morningstar Balanced Mutual Index Fund and the S&P 500 in 2009 as well as over the past ten years.
- Foundation donors continued their generosity, even during tough times. Gifts to the Foundation in 2009

totaled \$22.8 million, a significant figure given the economy and the eighth straight year gifts to the Foundation have exceeded \$20 million.

- While grantmaking fell to \$27.4 million in 2009, primarily because of the sharp market losses experienced in 2008, the Foundation maintained the ability to quickly respond to community needs. Despite the decline, the Foundation increased grantmaking to health and human service sector nonprofits meeting critical needs.
- Vital Signs, the Foundation's community-wide project to provide better information and understanding of the impact the recession is having on the metropolitan area, was launched. The online, one-stop resource provides critical information by tracking eight indicators including the unemployment rate and food stamp enrollment.
- In partnership with the Public Policy Forum, the Foundation commissioned a report to find out what's happened in big-city school districts when an elected school board is replaced by an appointed one. "School District Reform: The Devil is in the Details" culminated with an hour-long television broadcast where key leaders discussed the report and the future of the Milwaukee Public Schools.

2009 was a year of challenges, opportunity and perhaps most of all, change.

We moved from our long-time offices in downtown Milwaukee to our "new" home in the historic Schlitz Park complex. The Foundation offices occupy what was once Bottlehouse B, a hub of activity during the decades the



Board members: Thomas L. Spero, David J. Kundert, Mary B. Read, Ness Flores, Janine Geske, Peter W. Bruce, John W. Daniels Jr.

complex housed the Joseph Schlitz Brewing Company. Bottlehouse B has come to life again and is at the center of the Foundation's efforts to better serve our donors and the community.

Through our Community Partnerships department, the Foundation held nearly two dozen convenings in our new space, bringing together key community leaders to identify and address key issues including education, green jobs and better access to programs designed to help the working poor. Key meetings with donors, professional advisers and other Foundation partners also took place, bringing new opportunities for collaboration and information sharing.

In September 2009, long-time Foundation president Doug Jansson announced his retirement after 17 years of service. After a nationwide search, in June 2010, the Foundation Board selected Ellen M. Gilligan, vice president of Community Investment at The Greater Cincinnati Foundation, as its third president.

One thing is certain, 2010 will be different from 2009. What those differences will be is unclear. What is certain is that the Foundation, growing stronger in our leadership, grantmaking and collaboration with others, is prepared for the challenges and opportunity the year will bring.

Judy Jorgensen, board chair

Doug Jansson, president



Ellen M. Gilligan

### Welcome, Ellen Gilligan!

In June, the Greater Milwaukee Foundation announced it had selected as its new president and CEO a seasoned community

foundation leader with a strong track record of developing creative and innovative solutions to meet community needs.

Ellen M. Gilligan, most recently vice president for Community Investment at The Greater Cincinnati Foundation, will become the Foundation's third chief executive officer effective September 1, 2010. Gilligan has worked for The Greater Cincinnati Foundation since 1998 when she was hired to launch, develop the focus for, and manage the Foundation's Community Leadership Initiatives. In 2003, her duties expanded to include responsibility for the strategic direction in the design, development and management of all grantmaking programs.

"What impresses us most about Ellen is her belief that community foundations play a critical role working with other community partners to successfully address many of the long-term issues facing us," said 2010/2011 Foundation Board chair John W. Daniels Jr. "We are confident that Ellen, working closely with the Foundation Board and staff, will be a key leader in these efforts."

# With thanks, gratitude and hope



Doug Jansson, Greater Milwaukee Foundation president

It has been my honor for the past 17 years to serve as this Foundation's second CEO, succeeding David Huntington who did so much to build the Foundation. In recent months, I have been asked often what accomplishments I am proudest of during my tenure. It is an easy question to answer. I take the greatest pride in the staff I have assembled. They share my conviction that philanthropy can help transform this community and believe in service above self.

Equally, I am proud of the trust our donors have placed in us. In my 30-year career in the community foundation field I have never lost my sense of amazement and admiration for those who decide to leave a legacy for a cause they care about. It has been a privilege to carry out this work on their behalf.

Finally, I am proud of the growing impact the Foundation is making to help transform our community. We have helped develop and support scores of programs that are changing lives, improving neighborhoods, building the capacity of nonprofit organizations and increasing philanthropy.

The challenges ahead are daunting. Like much of the upper Midwest, we live in a community that is losing family-supporting jobs to other regions and countries. We face chronically high unemployment and growing poverty.

Our educational system is failing far too many children who we know will, without the necessary skills, struggle to earn a decent living. And our local governments that were once the envy of the nation are now faced with an ongoing financial crisis. Perhaps most sobering, we appear at times to have lost our desire to invest in and to make sacrifices for those things that will create a better future for our children and for our community.

In spite of these realities, I am optimistic about the future of this community. We have young, dynamic, emerging leaders. We have a culture of philanthropy and service and nowhere more than on our college campuses. We are beginning to embrace the growing diversity in our community as a positive trend that brings new energy and vision, much as it did a hundred years ago when Polish and German immigrants arrived in Milwaukee. And we are beginning to tackle the tough issues of how to reform our educational system, improve early childhood education, generate new jobs and think regionally rather than locally.

Moreover, I have no question that the Foundation's impact will continue to grow as it focuses on carrying out its mission and vision, as it provides extraordinary services for its donors and as it partners with others to tackle, with resolution, the issues that must be addressed to create a better future. We can and must do no less.



Robert J. Harris, Michael Hatch, Will Allen, and Ed and Diane Zore

## Civic leaders honored for service

For more than 50 years, the Greater Milwaukee Foundation has recognized the work of local civic leaders whose efforts improve the lives of others. The William C. Frye Award honors individuals whose volunteer efforts contribute toward the betterment of the community. The Frank Kirkpatrick Award acknowledges the work of those who have contributed to the physical improvement of greater Milwaukee. Both awards have a strong and rich tradition of recognizing some of the most respected civil leaders in the metropolitan area.

Nominations are submitted by donors and friends of the Foundation. Final selection of honorees is made by a committee and approved by the Board.

### William C. Frye Recipients

Robert Harris Jr. is a retired educator who continues to work with youth, primarily in Milwaukee's central city. His dedicated efforts to help young people reach their fullest potential have influenced the lives of thousands.

As a couple and individually, Ed and Diane Zore are tireless volunteers who give generously of their time, talents and expertise. Their continuing efforts strengthen many of greater Milwaukee's premier organizations serving youth, the arts and education.

### Frank Kirkpatrick Recipients

Will Allen is a Milwaukee urban farmer whose work is transforming the cultivation, production and delivery of food to underserved urban communities worldwide. His efforts were recognized with a 2008 MacArthur Foundation Genius Award and many other honors including a 2009 National Governor's Association Distinguished Service to State Government Award.

As president of Menomonee Valley Partners, Inc, Michael Hatch is leading a decade-long effort to transform the Valley from a 1,200-acre brownfield into a mixed-use redevelopment with positive and sustainable economic, environmental and social outcomes for the entire Milwaukee community.

# 2009 financial reports

## 2009 and 2008 summary financial statements

(unaudited, in thousands)\*

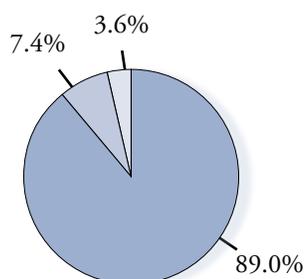
	2009	2008
<b>Assets</b>		
Receivables, prepaids and other assets	\$ 1,198	1,122
Investments, cash and cash equivalents	513,154	424,627
Beneficial interest in charitable trusts	4,172	3,919
Property, furniture and equipment, net	520	32
<b>Total assets</b>	<b>\$ 519,044</b>	<b>429,700</b>
<b>Liabilities and net assets</b>		
Accounts payable and accrued liabilities	\$ 1,063	747
Grants payable**	19,646	22,193
Net assets	498,517	406,760
<b>Total liabilities and net assets</b>	<b>\$ 519,044</b>	<b>429,700</b>
<b>Revenues</b>		
Contributions	\$ 22,813	37,410
Net investment return	103,391	(145,869)
Change in split interest agreements	881	(1,272)
<b>Total revenues</b>	<b>127,085</b>	<b>(109,731)</b>
<b>Grants and expenses</b>		
Grants approved**	27,443	32,717
Transfers to other organizations	1,050	
Program expenses	2,084	1,641
Custodial and investment management fees	632	756
Administrative expenses	4,119	4,091
<b>Total grants and expenses</b>	<b>35,328</b>	<b>39,205</b>
Change in net assets	91,757	(148,936)
Net assets, beginning of year	406,760	555,696
Net assets, end of year	<b>\$ 498,517</b>	<b>406,760</b>

\* The Greater Milwaukee Foundation is audited annually by KPMG, LLP. Due to the timing of the audits provided by our investment managers, the financial statements shown above are presented with unaudited results. The final 2009 audited statements are expected to be available by the end of October 2010 and can be found on our website, [www.greatermilwaukeefoundation.org](http://www.greatermilwaukeefoundation.org), in the Donors section under investment information.

\*\* Grants payable and grants approved include accounting adjustment for the valuation of multi-year grants.

### 2009 expenditures

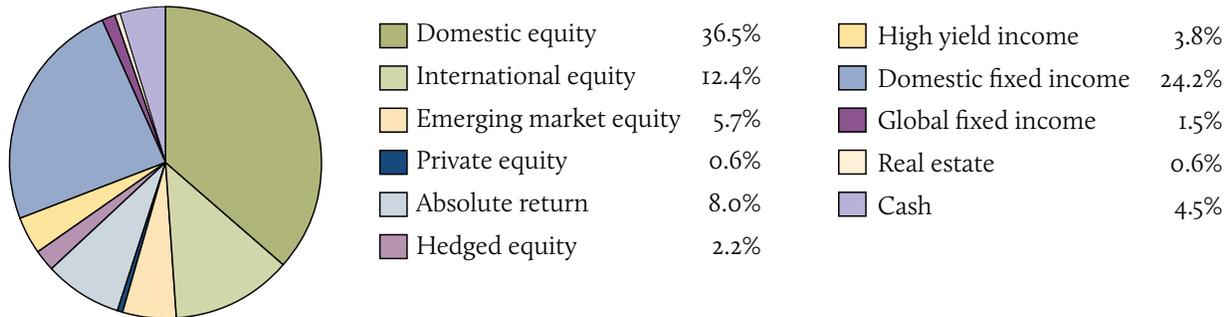
- Grants and program expenses
- Management and general expenses
- Development and donor services expenses



## A balancing act that provides long-term results

Protecting donors' investments has been of key importance to the Foundation since our founding in 1915. It's a tradition that continues today, especially in the current economic environment. The Foundation's volunteer Investment Committee of highly experienced experts and Colonial Consulting, our New York City-based investment consultant, believe a diversified investment portfolio offers the best balance between opportunities for long-term growth and protection during difficult economic times.

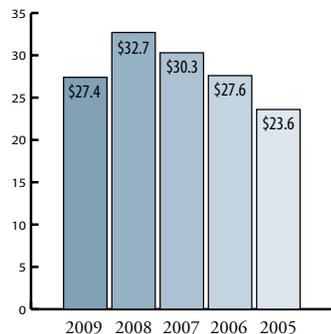
### Asset allocation (as of 12/31/2009)



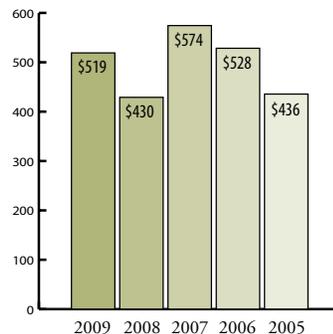
### Investment returns (annualized period ending 12/31/2009)

	1 year	3 year	5 year	7 year	10 year
S&P 500	26.5%	-5.6%	0.4%	5.5%	-1.0%
Morningstar Balanced Mutual Index Fund	24.0%	-1.9%	2.0%	5.4%	2.1%
GMF Investment Pool	25.1%	-0.1%	4.5%	8.2%	3.8%
U.S. Bank	28.0%	0.8%	4.9%	8.7%	4.8%
Marshall & Ilsey Trust Company	26.1%	-0.7%	4.1%	7.9%	3.5%
JPMorgan Chase	30.2%	1.1%	5.2%	8.9%	5.2%

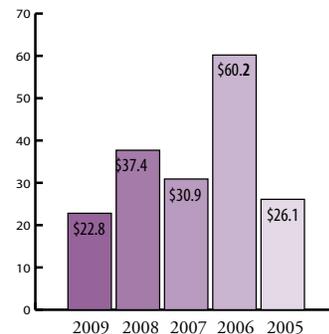
### Grants (in millions)



### Assets (in millions)



### Gifts (in millions)



## 2009 leadership projects

The Greater Milwaukee Foundation has a long history of identifying important community needs and concerns and working with our donors to support programs that bring about positive change. Our leadership projects are an example of that strong tradition. These projects stand out by the significant amount of time and money the Foundation has invested toward their development and the collaboration with other donors and community partners to develop strong programs that work.



Project Lead the Way

### Basic Needs Fund

Created by the Foundation in response to the economic downturn, the Basic Needs Fund addresses critical food and shelter needs in the metro area. The special fund was designed to help nonprofits meet the rising demand for their services. Thanks to Foundation support in 2009, food pantries were able to purchase additional food to meet the increasing number of individuals and families who walked through their doors. Area homeless shelters were able to cover basic operating expenses and accommodate overflow crowds. Since December 2008, nearly \$900,000 has been given to such agencies in the four-county area.

### Earned Income Tax Credit SuperSites

Creating opportunities for the working poor is one of the most effective ways to address poverty. At Foundation-sponsored Earned Income Tax Credit SuperSites in Milwaukee and Waukesha, low-income residents receive free tax preparation and can enroll in other health and social service-related programs for which they qualify. Since it started in 2002, the program has prepared more than 77,000 tax returns, generated more than \$92 million in total tax refunds for low-income families and helped more than 2,200 people become approved for BadgerCare, Healthy Start, Medicaid and FoodShare programs.

### Healthy Neighborhoods Initiative

The Healthy Neighborhoods Initiative is a collaborative effort between the city of Milwaukee and the Greater Milwaukee Foundation that seeks to revitalize Milwaukee neighborhoods that are at a tipping point. Eight Milwaukee neighborhoods and one Waukesha neighborhood are involved in the program, which focuses on a neighborhood's

assets and engages neighbors and homeowners to improve the area's health and stability. In 2009, residents of the participating neighborhoods invested more than \$1.3 million in projects to increase the curb appeal of their homes. Other property interventions, including the purchase, rehab and resale of homes and removal of absent owner investors has also occurred.

### Milwaukee Crisis Resource Center

The Milwaukee Crisis Resource Center is a public/private partnership that provides crisis intervention and recovery services for people with mental illness. The center uses an urgent care-like approach where people can get a current mental health assessment, help managing a current situation and referrals to services to help them in their recovery. In 2009, the center served 377 people, connecting them with housing, counseling, medication and legal assistance.

### Mosaic Partnerships Program

The Mosaic Partnerships Program believes relationships can be built across race and trust can be fostered in order to bridge the city's racial divide. Based on a model developed in Rochester, New York, the program pairs community leaders across race and/or ethnicity and guides them through a nine-month process of relationship and trust building. Now in its fourth year, the Mosaic Partnerships Program has engaged more than 500 people. It recently launched a special alumni relations program to engage past program participants and encourage them to work together to improve race relations in Milwaukee.

### New Leaders for New Schools

Strong principals create strong schools. Through a national initiative called New Leaders for New Schools, the



Milwaukee Public Schools district is working to ensure it has the next generation of quality school leaders in place. Thirty-one candidates have been recruited and selected to participate since 2007; 10 are working as principals and eight are assistant principals.

### **Nonprofit Management Fund**

The Nonprofit Management Fund, a collaboration of 11 private funding groups, understands that local nonprofits need to be strong and effective in order to effectively serve their clients and the community. The consortium works to strengthen the management and efficiency of the nonprofit sector in Milwaukee, Ozaukee and Washington counties by providing funding for management expertise. In 2009, the fund made 102 grants for technical assistance, totaling \$433,630.

### **Nonprofit Management Fund – Waukesha**

Following the success of the Nonprofit Management Fund, a similar consortium was developed in 1998 to specifically serve Waukesha nonprofits. The group of four funders provides grants to help organizations in areas including fund raising, technology, strategic planning and marketing. The fund made grants to 14 agencies in 2009 for a total of \$79,665.

### **Sponsor-A-Scholar**

College can seem nothing more than a dream, particularly for first generation and low-income students in Milwaukee. But with the help of Sponsor-A-Scholar, a mentoring program run by the YMCA of Metropolitan Milwaukee, more students are making it a reality. The program links academically promising high school freshmen with a volunteer mentor and provides academic assistance and

preparation throughout high school as well as a scholarship. Since the program began in 1996, 98 percent of participants have graduated high school and 96 percent have continued on to postsecondary opportunities, including college, vocational schools or the military.

### **Project Lead the Way**

Engineering and technology are promising and profitable careers, yet they often remain intimidating choices for students who struggle to understand the concepts until they see them in action. Project Lead the Way helps middle and high school students make that connection by giving them a hands-on, project-based introduction to the skills needed for careers in science, technology, engineering and math. More than 70 middle and high schools in metro Milwaukee have instituted the curriculum. Wisconsin has the third largest number of school districts in the country participating in the program and the Milwaukee Public Schools has the largest concentration of minorities and females in the program of any participating district.

### **Urban Education Fellows Program**

Through an innovative teacher preparation curriculum, the Urban Education Fellows Program is bringing new teachers and new strength to Milwaukee's private schools. The alternative teaching certification program, jointly offered by Mount Mary and Alverno colleges, enables individuals to earn a teaching certificate for grades one through eight as well as a master's degree in education while teaching full time. A pilot program for the high school level began in 2009 that allows fellows to earn a license in high school math or science as well as a master's in education. Overall, the program has produced 92 graduates, 86 percent of whom are still teaching, and impacted nearly 2,500 students.

# Partner foundations and supporting organizations



Casa Guadalupe Education Center

Our partner foundations provide services that help donors in communities throughout the metropolitan area maximize their charitable giving and support the work of scores of local organizations. Each partner foundation has a volunteer advisory board of local leaders who know the needs and strengths of their individual communities. Our partner foundations are able to focus their efforts on local grantmaking, while GMF provides administrative support and investment expertise.

## Greater Cedarburg Community Foundation Fund

The Greater Cedarburg Community Foundation Fund is creating an endowment and legacy for Cedarburg for generations to come. With gifts to this fund's unrestricted or named funds, donors connect to community needs and contribute to the arts, cultural and community service projects that help secure Cedarburg's civic vitality.

For more information on the foundation, its founders and its donors, visit [www.cedarburgfoundation.org](http://www.cedarburgfoundation.org).

## Oconomowoc Area Foundation

The Oconomowoc Area Foundation was established to support charitable programs in the communities within the Oconomowoc Area School District and Wales, Ottawa, Dousman, Chenequa and Nashotah. As a supporting foundation the OAF's board is made up of local business and civic leaders and provides donors with a convenient way to establish a lasting legacy in their community. Hilbert N. Scherffius, a lifelong Oconomowoc resident who ran Lorleberg's True Value Hardware, was the impetus for the OAF. He established the Scherffius Fund through his estate and today the name lives on through the generous support provided by his fund to the Oconomowoc-area nonprofit community.

For more information on the foundation, its founders and for a full list of component funds, visit [www.oconomowocareafoundation.com](http://www.oconomowocareafoundation.com).

Below are the new funds created in 2009:

- Christmas Spirit Foundation
- Nate Zastrow Family Foundation

## West Bend Community Foundation

Launched by West Bend civic leaders Cliff Nelson and Doug Ziegler, this supporting foundation's nine-member board is made up entirely of West Bend residents and supports projects benefiting that community. The organization gives donors an opportunity to create unrestricted field of interest and advised funds that are permanently dedicated to benefit the causes they care about the most.

For more information on the foundation, visit [www.westbendcommunityfoundation.org](http://www.westbendcommunityfoundation.org)

## Supporting organizations

Many donors choose to establish a supporting organization because it is most similar to a private foundation yet still enjoys the preferential tax treatment of a public foundation. GMF supporting organizations also benefit from the Foundation's depth and breadth of financial, administrative, and grantmaking expertise and they provide greater visibility.

Our partner supporting foundations provide donors with an easy and efficient way to establish their own named funds to support the causes they care about most in their community, their country or the world. By taking this step, donors secure a lasting legacy for themselves and their family.

A supporting organization has its own board, letterhead and counsel and may select its own investment manager or use one of the Foundation's four investment pools. It also may publish its own annual report and other materials.

Greater Milwaukee Foundation supporting organizations include:

- Bucyrus Foundation
- Hepburn "Bootstrap" Foundation
- Honkamp Family Foundation
- Jay Kay Foundation
- Oconomowoc Area Foundation
- Strattec Foundation Inc.
- The Ceres Foundation Inc.
- West Bend Community Foundation Inc.



Schaus Family

## Starting a fund

The ease of starting a fund is just one of the reasons donors say they turn to the Foundation to help fulfill their charitable goals. With a minimum gift, little paperwork and guidance from a professional adviser or Foundation staff member, donors can easily create a personal, permanent and powerful legacy.

### Choose a name for your fund

A fund's name stays with it forever, maintaining the donor's charitable presence in the community. Unless anonymity is preferred, the name selected is listed in the Foundation's reports, online and in grant award letters.

### Focus your fund's impact

Advised funds, the most popular option and a favorable alternative to a private foundation, are designed for donors who wish to play a more active role in their giving. Children, future

generations and other family members can be named successor advisers.

Other fund options allow donors to address the community's highest priorities and changing needs, focus on a specific interest area or geographic area or provide ongoing support for one or more nonprofits.

### Decide on a giving timeline

#### Give now:

Donors can establish funds immediately with cash or appreciated assets such as securities and real estate. Donors' gifts are tax deductible, and capital gains taxes may be avoided on gifts of appreciated assets held for at least one year. There are many other ways to give that would provide an income, such as a charitable remainder trust and a charitable gift annuity.

#### Give later:

Many donors establish funds that take effect at their deaths through deferred

gifts such as bequests, life insurance proceeds or retirement plan proceeds. Charitable gifts of IRAs or qualified retirement plans are particularly tax effective and easy to do.

### Select an investment manager

As one of the world's oldest and largest community foundations, the Foundation is uniquely positioned to provide donors with different investment options that provide strong investment performance.

Donors may choose from the following:

- **Greater Milwaukee Foundation Inc. Investment Pool**  
Managed by the Foundation Board through its Investment Committee
- **Trust company investment pool**  
Managed by trust companies including JPMorgan Chase, U.S. Bank and M&I Marshall & Ilsley Trust Co.

## 2009 charitable funds



The following are charitable funds that were created in 2009.  
For a complete listing of all Foundation funds, please visit [www.greatermilwaukeefoundation.org](http://www.greatermilwaukeefoundation.org).

Lucille and Milton Abraham Lutheran Elementary School Fund  
Cedarburg Community Scholarship Fund  
Christmas Spirit Foundation  
Cream City Medical Society Legacy Scholarship Endowment Fund  
John and Irma Daniels Clark Atlanta Scholarship Fund  
Foster Care Recruitment Fund  
Ralph N. Gardner Family Fund  
Dr. John H. and Cynthia A. Jackson Scholarship Fund  
Ted and Arleen Koenigs Designated Fund  
Ted and Arleen Koenigs Fund 2  
Elizabeth LaBahn Roesler Fund  
Lorna Mayer Fund  
Sean Patrick McNally Fund  
Justin Philipp Meyer Memorial Fund  
Keith and Dee Miller Designated Fund  
Keith and Dee Miller Fund  
Mary B. Read Fund  
David C. Scott Sr. Fund A  
David C. Scott Sr. Fund B  
David C. Scott Sr. Marquette University Scholarship Fund  
David C. Scott Sr. Scholarship Fund D  
Roy and Sandra Uelner Family Fund  
Women's Fund/Sylvia and Gilbert Goldman Memorial Fund  
Wright Brothers Fund  
Nate Zastrow Family Foundation  
Helen and Morris Zolin Scholarship Fund



Mary L. Nohl Fund

## In memoriam

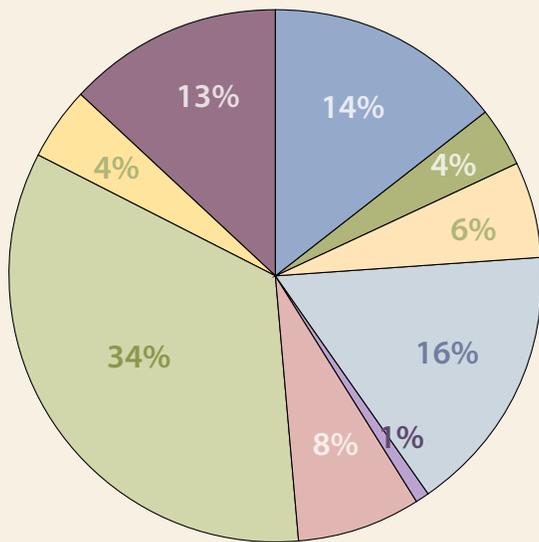
This list recognizes the donors and friends who passed away in 2009. They always will be fondly remembered, as will their generosity.

Milton Abraham  
Robert C. Archer  
Henry E. Fuldner  
Ralph N. Harkness  
Jean F. Holtz  
Steven Jackson  
Ralph Jansen  
Arleen Koenigs  
George N. Kolich  
Ruth Lorant  
George F. Markham Jr.

Mary Jane McBroom  
Mary A. Mellowes  
Mary D. Messinger  
Catherine Metz  
Keith Miller  
Asher Nichols  
Dr. Carroll Olson  
Caroline M. Pharris  
Catherine M. Podolin  
Mrs. Donald J. Ramaker  
Alfonso D. "Robbie" Robertson

Richard Rothwell  
Richard Schmidt  
Geraldine Schwandner  
Ralph N. Trepte  
Kendrick Orr "Kim" Trostel  
Clifford Wenthur  
John R. Willetts  
James O. Wright  
Imogene M. Wyckoff  
Tom Zuern

# 2009 grant summary



Arts and Culture	\$3,991,615
Children/Youth/Families	\$989,347
Community Development	\$1,655,584
Education	\$4,498,683
Employment/Training	\$212,282
Environment	\$2,088,895
Health/Human Services	\$9,327,580
Youth Development	\$1,205,698
Other	\$3,461,551

The following is a listing of discretionary grants of \$25,000 and above.  
For additional information about the grants made in 2009, visit the news archive on our website.

## Arts and Culture

Milwaukee County Historical Society	\$50,000
University of Wisconsin-Milwaukee Foundation	\$50,000
Milwaukee County Historical Society	\$26,000
First Stage Children's Theater	\$25,000
Milwaukee Ballet Company	\$25,000
Milwaukee Chamber Orchestra	\$25,000
Milwaukee Symphony Orchestra	\$25,000

## Children/Youth/Families

Meta House Inc.	\$30,000
Family Service of Waukesha County	\$25,000
La Causa Inc.	\$25,000
Parenting Network of Greater Milwaukee	\$25,000
Penfield Children's Center	\$25,000

## Community Development

Sixteenth Street Community Health Center	\$100,000
Center for Neighborhood Enterprise	\$50,000
Enderis Park Neighborhood Association	\$50,000
Heartland Housing Inc.	\$50,000
Housing Resources Inc.	\$50,000

Marquette University	\$50,000
Sherman Park Community Association	\$50,000
Agape Community Center	\$45,000
Layton Boulevard West Neighbors Inc.	\$45,000
Urban Anthropology	\$42,500
Local Initiatives Support Corporation	\$40,000
Rebuilding Together Greater Milwaukee	\$40,000
Urban Economic Development Association of Wisconsin	\$40,000
Legacy Redevelopment Corp.	\$35,000
University of Wisconsin Extension-Waukesha County	\$35,000
Mercy Housing Lakefront	\$25,000
Urban Economic Development Association of Wisconsin	\$25,000

## Education

Teach for America	\$150,000
City Year	\$100,000
University of Wisconsin-Milwaukee Foundation	\$50,000
Wisconsin Citizen Action Fund	\$30,000
Literacy Services of Wisconsin	\$30,000
Neighborhood House of Milwaukee	\$30,000



# Volunteers

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John W. Daniels Jr.  
George C. Kaiser

## Awards Committee

Joan M. Prince, chair  
Ness Flores  
Judy Jorgensen

## Communications Committee

Franklyn M. Gimbel, chair  
Jeff Fleming  
Kathy Lambert  
Richard White

## Development Committee

Peter W. Bruce, chair  
Ness Flores  
Joan Klimpel  
David J. Lubar  
Joan M. Prince  
Blaine E. Rieke  
Paul Roller  
Todd Sivak

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Kenneth C. Krei  
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Duke University  
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University of Minnesota  
Paula Traktman, Ph.D.,  
Medical College of Wisconsin



Hawley Environmental School students



Donors Fay and Angela Topetzes

**Youth Advisory Council –  
Waukesha County**

Rob Doucette, coordinator  
Jake Angst  
Michael Carlson  
Catherine Haines  
Olivia Haines  
Jenna Mertz  
Sean Murray  
Alexandra Hanson  
Elizabeth Hanson  
Alesia Hoge  
Anne Paprocki  
Braiden Sorgenfrei  
Jack Tyson  
Jenna Villanova  
Tim Voss

**Youth in Service Fund  
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Jerel Ballard  
Tammy Barnett  
Vakia Bland  
Samuel Briggs  
Max Dodge

Bryan Evans  
Asia Henderson  
Shaqueda Jenkins  
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Ericka Kelly  
Khalil Johnson  
Nikki Loiben  
Nchinda Junior Nchinda  
Alexandra Pinon  
Natalie Ramirez  
Maureen Reigert  
Elizabeth Roque  
Angellic Ross  
Mariah Scott  
Margaret Steinhafel  
Tyler Thur  
Jorge Trinidad-Espinoza  
Luther Troy  
Raven Washington  
Eric Williams

**Youth in Service Fund  
Alumni volunteers**

Tawanna Jackson  
Marshay Montriell  
Nichelle Montriell  
Nicholas Robinson

**Wisconsin AIDS Fund  
Board of Directors**

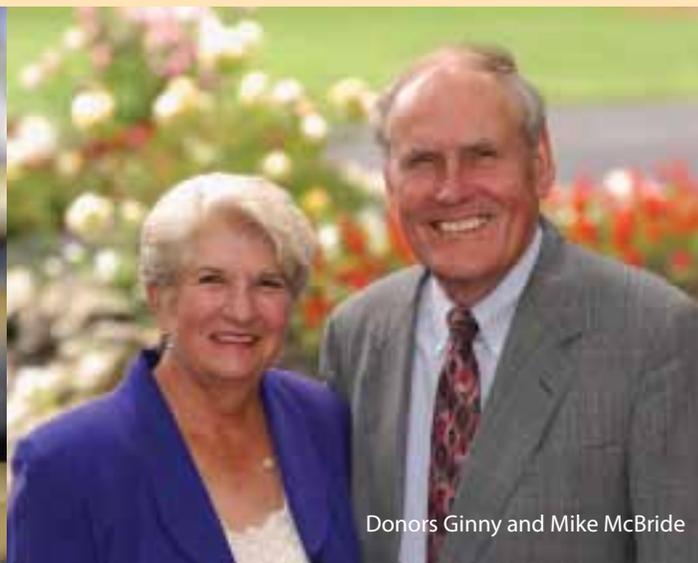
Julie Bock  
Maria Castrejon-Perez  
Nichole Gladney  
Jerry Janis  
Yuri Keegstra  
James A. Marks  
Charlotte Mayfield  
Warren Anthony Scherer  
Ericka Sinclair  
Paul Vornholt

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Molly Herrmann  
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Jill Owczarzak  
Laura Stuart  
Nichole Gladney  
Erica Sinclair



Michael Nguyen, Teach for America



Donors Ginny and Mike McBride

# Herbert J. Mueller Society

The Herbert J. Mueller Society recognizes the efforts of professional advisers who have worked with the Greater Milwaukee Foundation on behalf of clients who have an interest in creating charitable legacies. The Society is named in memory of Mueller, an estate planning attorney who, through his quiet efforts, helped shape the Foundation into the organization it is today. Mueller worked with his clients to create more than a dozen Foundation funds with gifts totaling nearly \$50 million by the time he passed away in 2001 at age 91.

Timothy R. Aik	George A. Evans Jr.	John J. Laskowski	Fredrick J. Safer
Robert G. Alexander	J. Douglas Fitzgerald	Scott A. Latzke	Allen M. Salomon
Steven R. Allen	Gerald J. Flood	Andrew R. Lauritzen	Brenda Schlais
Randy Averill	Ness Flores	Kristi E. Lewsing	Gregory J. Schmidt
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Barbara A. Bombaci	Richard S. Gallagher	Charles G. Maris	Nancy L. Shue
Nancy M. Bonniwell	Chris K. Gawart	Bradley D. Mazola	Todd W. Sivak
Wendy Reed Bosworth	Franklyn M. Gimbel	N. Lynnette McNeely	Christopher Smith
Rick Bottoni	Kathleen M. Gingrass	Katherine M. Menacher	Michael R. Smith
Jill H. Brodkey	Sheryl A. Gist	Sally Merrell	Sara E. Snyder
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Janice L. Dusold	Jeffrey A. La Bri	Scott Richardson	Allan T. Young
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David Epstein	Katherine W. Lambert	Linda Rieke	
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Greater Milwaukee Foundation

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Paula Perez, webmaster/graphic artist

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Martha De La Rosa, administrative assistant/meeting coordinator

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Katie Cummings, development and donor services manager  
Jedd Lapid, development officer  
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Barb Tibbals, development and donor services associate

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Marybeth Budisch, senior donor services officer

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Sharon Loxton, senior financial analyst  
Stacie Makkos, accounting assistant  
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Bryan Demerath, database/systems administrator

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Fred Gutierrez, senior program officer  
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Tracy Maclin, senior program officer  
Tamara Martinsek, WAF coordinator  
Dionne Shaw, senior program officer  
Carol Wilson, scholarship and program coordinator

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- Cover Children from the Next Door Foundation, Milwaukee
- P. 1 Milwaukee County Transit System bus  
Student from Hawley Environmental School, Milwaukee  
W-2 recipients filling out online job applications  
Beds at the Milwaukee Rescue Mission shelter
- P. 2 Doug and Sharon Ziegler
- P. 4 Residents of the Layton Boulevard West neighborhood celebrate their solar light project
- P. 6 Waukesha County Community Dental Clinic
- P. 8 Shelia and Gertude Payton
- P. 10 Site coordinator of the Milwaukee Violence Free Zone and students at Bradley Tech High School
- P. 12 Froedtert & Medical College of Wisconsin Eye Institute (Photo courtesy: Medical College of Wisconsin)
- P. 13 Walter and Catherine Lindsay (Photo courtesy: Lindsay family)
- P. 14 Foundation Board members
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- P. 17 Robert J. Harris, Michael Hatch, Will Allen and Ed and Diane Zore, 2009 winners of the William C. Frye and Frank Kirkpatrick awards (Photo: John Kimpel)
- P. 20 Bell Middle School students participate in Project Lead the Way
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Jeff Monday with Jennifer Morris, an Urban Education Fellows Program alumni
- P. 22 Casa Guadalupe Education Center in West Bend
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- P. 24 Teacher and student from Hawley Environmental School, Milwaukee
- P. 25 The yard of late Milwaukee artist and Foundation donor Mary L. Nohl (Photo courtesy: Eric Oxendorf)
- P. 27 Fondy Food Center, Milwaukee
- P. 28 Students from Hawley Environmental School, Milwaukee  
Donors Fay and Angela Topetzes
- P. 29 Michael Nguyen, a Teach for America middle school English teacher  
Donors Ginny and Mike McBride
- P. 31 Reception area at Greater Milwaukee Foundation

Annual report design: Paula Perez

Writers: Becca Mader, Denise Callaway and Carolyn Kott Washburne



[www.greatermilwaukeefoundation.org](http://www.greatermilwaukeefoundation.org)

Strengthening Communities through Effective Partnerships



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