

A photograph of the Milwaukee skyline at night, featuring the Pabst Pavilion and various city buildings reflected in the water. The image is used as a background for the title text.

LEADERSHIP & LEGACY

GREATER MILWAUKEE FOUNDATION

2013
Annual Report

GREATER MILWAUKEE FOUNDATION



2013 Annual Report

LEADERSHIP & LEGACY

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LEADERSHIP & LEGACY

LETTER FROM THE BOARD CHAIR AND PRESIDENT & CEO



Leadership and legacy. Those themes are ingrained in our nearly 100 years of building a better community. Our story began in 1915 when area leaders, like Patrick Cudahy, took the bold step to organize one of the nation's first community foundations.

This new venture marked a shift in how generous individuals gave, how a community learned about emerging issues and how it came together to solve problems. Many philanthropists and organizations have followed that lead because they know that

together we can transform the face of our community and make great things happen.

By any measure, 2013 was a banner year for the Greater Milwaukee Foundation. Total grants awarded reached nearly \$39 million, the largest amount in our history. Donors and friends made more than \$37 million in gifts to the Foundation, the third largest amount in our history.

The Foundation makes a difference in countless lives today because of the endowment built over decades, one donor at a time. As a community foundation, we are more than a convenient vehicle for giving. We are an engine for giving with impact. Together we have strategically addressed matters ranging from helping families in crisis in the 1930s to neighborhood revitalization and development in the 1970s to improving educational outcomes in our schools today.

We continue to align our competitive grantmaking resources around four impact

"Together we can transform the face of our community and make great things happen."

**"The Foundation
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donor at a time."**

In order to increase our community impact, we align a powerful combination of resources – grantmaking, research, convening, policy, communications, and partnerships with our donors – to make a measurable difference.

We invite you to explore this report for more extensive stories, grant and fund information from the past year. We hope it embodies our celebratory energy and illuminates a year when challenges were met with compassion and new ways of thinking – impact built on nearly 100 years of contribution. It is our honor to lead your community foundation, and we thank you for your partnership, generosity and commitment to our region. In 2015 we will celebrate our centennial with a joyful, poignant and inspiring celebration for the community that has made every grant, every solution, and every success story possible.

areas relating to issues critical to our region's future: strengthening education, strengthening neighborhoods, increasing economic opportunities and promoting racial equity and inclusion. These complex issues are interrelated and the strategies to address them must be as well.

**"As a community
foundation, we
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Peter W. Bruce, Board chair



Ellen M. Gilligan, President & CEO

2013 YEAR IN REVIEW

GIFTS

\$37.8 million

GRANTS

\$39.0 million

ASSETS

\$712 million

TOTAL # OF FUNDS

1,194

TOTAL # OF
GRANTS AWARDED

3,807

GRANTS RANGED
FROM

\$50 - \$1 million



MAJOR MILESTONES FOR MILWAUKEE SUCCEEDS

Prior to 2011, the concept behind Milwaukee Succeeds did not exist in Milwaukee. In just two short years, the communitywide partnership has grown and evolved to become recognized as a national leader in the field of cradle-to-career educational initiatives. In 2013, it was honored with the Cradle to Career Catalyst Award by StriveTogether, a national network of cradle-to-career partnerships. Milwaukee Succeeds also reached a number of key milestones throughout the year – not least of which was publishing its first Milestone Report, an annual publication that provides data for the challenges Milwaukee faces and goals that have been set for how to address them. Eight networks are up and running with more than 300 nonprofit and educational groups involved; pilot programs around third grade reading began in several schools and the partnership embarked upon a strategic planning process.

Milwaukee Succeeds involves 300 nonprofit and educational groups.



YOU GAVE. WE MATCHED. THOUSANDS BENEFITED.

The greater Milwaukee community celebrated a historic day of giving in March via the Foundation's Match Day, a 24-hour online giving event supporting area food and shelter agencies. When the sun set on March 14, a total of \$2,802,003 had been raised from thousands to benefit 21 nonprofits. Each agency received at least \$10,000 in online gifts that day and the most raised was \$345,945. Beyond the monetary rewards, the agencies reported that Match Day helped increase awareness of hunger and homelessness in the community, rallied the community around their work and generated new supporters for their mission. Compared to the inaugural event in 2012, more people donated online, more money was raised online, more Foundation donors contributed and more people in greater Milwaukee were able to benefit as a result.

Match Day raised \$2.8 million to benefit 21 area food and shelter agencies.



SMALL GRANTS, BIG IMPACT

Typical grants through our quarterly cycle range from \$25,000 to \$100,000 but we know even small grants make a big impact. Early in 2013, the Foundation launched a mini grant program, Summer Grants for Kids, to support new enriching and educational opportunities for area children during the summer. In its inaugural year, the program made grants of \$1,000 to 17 agencies throughout Milwaukee, Ozaukee, Waukesha and Washington counties. Projects varied in length and scope – from a two-week rooftop gardening workshop to a summer long Spanish language program – but all resulted in leaving participants with new experiences and great summer memories.

Summer Grants for Kids made grants of \$1,000 to 17 agencies.



UNDERSTANDING METRO MILWAUKEE

We often hear data about how our region is faring. Too often, this is in isolation without a broader context. The new “Vital Signs: Benchmarking Metro Milwaukee” compares our region to 15 others, many of them our economic competitors. This report allows us to see how we compare on items such as population growth, educational attainment, exports and dozens of other indicators of vitality. Policymakers, business leaders, and foundations all can use this objective data to better understand where we are and where we need to invest to build upon success and strengthen areas of challenge.

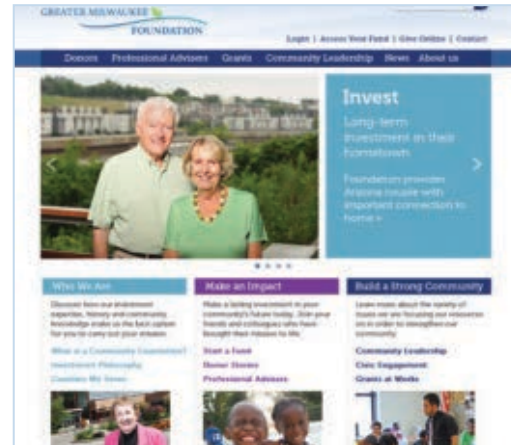
Vital Signs compares our region to 15 others.



INVESTING IN NONPROFIT CAPITAL PROJECTS

This year marked the return of significant investment in new construction and renovation projects in the Milwaukee area through the Foundation's capital grants program. Historically we had awarded grants during the fourth quarter for such projects but held off doing so following the recession. With the economy improving and a growing need and demand to improve infrastructure within the nonprofit community, we relaunched the program in the fourth quarter with a \$736,790 investment in 10 area projects.

**Capital grants program
invested \$736,790 in ten
area projects.**



NEW WEBSITE

In mid November we unveiled a brand new look and feel for our website, which serves as an important resource for prospective and current donors, grantees and the general public. In addition to a cleaner, more colorful and crisp design, we provided more profiles in philanthropy, shared more information about the services we provide to bring individuals' missions to life and made it easier for grantees to navigate the online application process.

www.greatermilwaukeefoundation.org



Waukesha County Community Dental Clinic



Norman and Lucy Cohn Family Fund



Winnie Fund



Bucyrus Foundation



Oak Creek Cares Fund

DONOR HIGHLIGHTS

2013

The seeds for 48 new legacies were planted in our community in 2013. They were all driven and inspired by different reasons and life events but all with one common goal in mind: to make a positive difference in the community for years to come.

TOTAL FUNDS BY COUNTY:

	New	Total
Milwaukee:	33	754
Ozaukee:	5	126
Washington:	2	52
Waukesha:	6	187
Other:	2	75

DONOR RECOMMENDED GRANTS

Total dollars

\$30,275,721

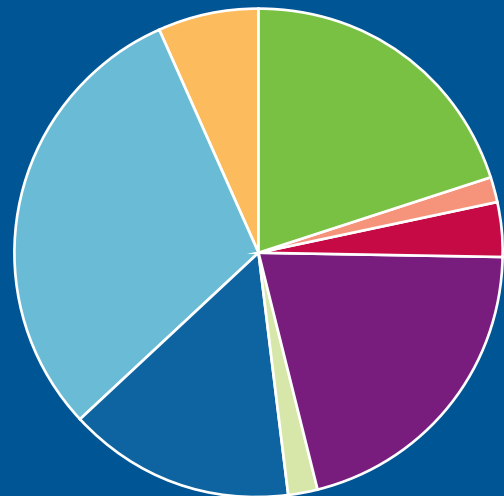
Total # of agencies supported

1,225

These grants reflect funding made through supporting organizations, donor advised, designated and agency endowment funds. They are awarded to a specific agency at the recommendation of a donor or fund adviser.

By program area

- Arts and culture: **\$5,791,124**
- Children, youth and families: **\$1,846,313**
- Community development: **\$1,108,640**
- Education: **\$5,975,475**
- Employment/training: **\$585,638**
- Environment: **\$4,330,638**
- Health and human services: **\$8,739,540**
- Other*: **\$1,898,353**



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



“We hope that if we are spending the money wisely, that manufacturing will continue to grow in importance here in this area.”

– Tim Sullivan, Bucyrus Foundation

Bucyrus legacy lives on through philanthropy

Like Big Muskie, the world's largest earth moving machine it created in 1969, Bucyrus International itself loomed large for many years in Milwaukee and worldwide.

It was a dynamic company designed for digging and making the earth move. But Bucyrus also built a reputation for digging in to meet the local needs of its community. From providing Christmas gifts to South Milwaukee children to supporting the United Performing Arts Fund, its strong philanthropic spirit permeated the Milwaukee area.

But shortly after the company was acquired by Caterpillar in 2011, the Bucyrus name was dropped. Thanks to former CEO Tim Sullivan and several other former employees, Bucyrus' longstanding reputation as a committed, compassionate corporate citizen lives on.

"We wanted to continue the name in perpetuity," said Sullivan, who spent 35 years at Bucyrus, including nearly 11 as its president, and heads up the Bucyrus Foundation.

Nearly a decade before the acquisition, leaders transferred \$15.1 million in assets from the company's private foundation to the Greater Milwaukee Foundation to create a supporting organization. At that time, Sullivan said, the board wanted to avoid the possibility of having a purchasing

company absorb the Bucyrus Foundation and stray away from what it historically supported. The supporting organization provided a great alternative, allowing Bucyrus to have its own advisory board to make decisions on grantmaking and other matters while the Greater Milwaukee Foundation handled administrative details.

"What we have set up now is absolutely perfect – it provides great investment returns at a low cost," Sullivan said. "That is testament to the quality of people who work at the Foundation and the people who have nurtured us along the way."

Bucyrus started its foundation in the 1970s and supported community and social services, medical research and health care, education and arts and culture. It offered an employee matching program, where employees and retirees could make small donations to agencies of their choice and the foundation would match them dollar for dollar, and provided college scholarships to employees' children.

Its grantmaking has evolved just as its structure has from a private foundation to a supporting



Tim Sullivan and Bradley Tech students at the dedication of the new welding lab.

organization to a donor advised fund. In lieu of smaller, more frequent grants to a broad range of safety net agencies, the Bucyrus Foundation is making sizable investments over a longer period of time to more focused areas. The goal, Sullivan said, is "to be more proactive so as to eliminate the need for safety nets." In 2013, for example, the foundation announced a \$1 million investment over 10 years to United Way of Greater Milwaukee to support adult education and employment assistance programs.

It also has returned to its roots by supporting workforce development, particularly manufacturing. In late 2013 it made a \$250,000 grant to Bradley Tech High School to help expand its welding lab program to meet increasing demand from students.

BUCYRUS FOUNDATION

Created: July 2002

Purpose: To support projects addressing significant community issues in the Milwaukee metropolitan area



"We want to share our lives of good fortune with the Milwaukee community that has been so good to us."

- Lucy Cohn

Nurse pays it forward with Foundation fund after a lifetime of giving back

A giver and a doer. That's how Lucy Cohn once lovingly described Norman, her husband of 54 years. But you would be hard pressed to find anyone who knew and loved Lucy to use anything but those very same words to describe her.

Or, in Norman's own words: "Helping people was her main thrust."

Lucy lived a full life of service, from an Army nurse tending to WWII veterans at a psychiatric hospital in Kentucky to a volunteer counselor providing comfort to patients at Columbia St. Mary's Hospice in Milwaukee. Despite her death in 2013 at age 90, that spirit of giving continues through the Norman and Lucy Cohn Family Fund. She and Norman created a fund through a deferred gift of their 24th floor downtown Milwaukee condo, with a retained life interest.

"They came from very modest means and were very frugal," said attorney George Dionisopoulos of Lucy and Norman, who died in 2000. "It was very clear they would save for helping others."

Lucy was born in Kokomo, Indiana, one of 10 children of Russian

emigrants. She graduated from Cincinnati's Jewish Hospital School of Nursing before serving in the Army. While raising two sons, Lucy became what Norm described as a "perennial student," eventually earning bachelor's, master's and doctorate degrees in nursing. Her career included time as a nurse at Columbia Hospital and Mount Sinai, director of patient care services at Mount Sinai, head of psychiatric nursing at Milwaukee County General Hospital School of Nursing and nursing professor at several local colleges before eventually going into private practice.

"I'm a peripatetic counselor," she said in a 1972 Milwaukee Sentinel story. "I counsel in equipment rooms, in classrooms, in corridors and on stairways. There's no place I don't counsel."

Lucy's volunteering knew no boundaries either. Every day she devoted time and compassion



Lucy Cohn with members of UWM's Fine Arts Quartet.

somewhere, from the Milwaukee Art Museum to the Temple Emanuel El B'ne Jeshurun. In fact, Lucy continued seeing clients and fulfilling her volunteer duties up to the last days of her life.

"She certainly found great comfort and satisfaction in helping others," Dionisopoulos said.

Besides Norman and nursing, Lucy's other love was the arts, particularly UWM's Fine Arts Quartet. The first two seats in the first row were reserved for her, a devoted patron for more than 50 years. As a show of her affection, she left a \$100,000 gift to be used as a permanent endowment for the group.

NORMAN AND LUCY COHN FAMILY FUND

Created: March 2013

Purpose: To support projects that enrich the cultural life of the greater Milwaukee community and to benefit causes related to mental health, elderly and other charitable purposes with the greatest need.

ACORN FUNDS*

With Acorn Funds, individuals can make regular monthly contributions of as little as \$100 until the fund grows to grantmaking size. Gifts are tax deductible and reinvesting the income earned can speed the growth of the fund.

Total # of new funds 5

Total # of funds** 153

Total market value of assets \$7,828,928

Susan Kasten Brumder Fund

Early Music Now Permanent Endowment Fund

Dan and Joanne Kline Fund

Doris Masterson Family Fund

Oak Creek Cares Fund

*These are reflected in other fund types

**Total includes partner foundation funds



Photo by photographer Dianne Hofmann

Hundreds participated Aug. 3, 2013 in the Chardi Kala 6K, an event in remembrance of the six who were killed in the Sikh Temple shooting.

FUND HIGHLIGHT

OAK CREEK CARES FUND

Oak Creek Cares is an acorn fund created by and for the greater Oak Creek community as a result of the tremendous outpouring of support after the shooting at the Sikh Temple of Wisconsin on Aug. 5, 2012. Residents' desire to create a positive from a negative and

demonstrate the power of working together to build a stronger community led to the fund's creation. Its purpose is to support programs aimed at reducing violence that benefit the safety and security in the greater community, specifically Oak Creek and the surrounding areas.

AGENCY ENDOWMENT FUNDS

Agency endowments enable nonprofits to provide a steady source of annual operating support for themselves.

Total # of new funds 8

Total # of funds* 102

Total market value of assets \$30,406,419

Benediction Lutheran Phyles Endowment Fund

Early Music Now Permanent Endowment Fund

Feeding America Eastern Wisconsin Foundation Fund (4 funds)

Luxembourg American Cultural Society Endowment Fund

Waukesha County Community Dental Clinic Fund

*Total includes Acorn Funds and partner foundation funds
Please note: Some agencies may have multiple funds



FUND HIGHLIGHT

WAUKESHA COUNTY COMMUNITY DENTAL CLINIC

This agency endowment was created to support the mission of the Waukesha County Community Dental Clinic, which is dedicated to working with the community to improve the dental health of low income Waukesha County residents through

preventive and restorative dental services, oral health education and advocacy work. The nonprofit provides more than 8,000 appointments for children and adults annually and has been changing lives, one smile at a time, since 2008.

DESIGNATED FUNDS

Designated funds let individuals select specific organizations to receive a regular annual grant each year while the Foundation makes sure the grants remain relevant over time and respond to changing circumstances.

Total # of new funds 6

Total # of funds* 224

Total market value of assets \$134,403,851

Black Arts Think Tank Fund

Norman and Lucy Cohn Family Fund

EM-DOT Fund

Richard M. Kaul LGBT Arts Endowment Fund

George H. and Virgilee F. Krueck Fund

Louise Schloemer Roth Scholarship Fund

*Total includes Acorn Funds and partner foundation funds



NEW FUNDS

West Bend West High School

FUND HIGHLIGHT

LOUISE SCHLOEMER ROTH SCHOLARSHIP FUND

This scholarship was created in memory of Louise Schloemer Roth, a longtime West Bend community volunteer, church leader and businesswoman. Roth was the mother of four West Bend High School graduates and grandmother of six West Bend East and West grads. Her community involvement in West Bend spanned

more than 70 years, with a particular interest in supporting underprivileged families and single parents. The scholarship continues her traditions of love and support for the area and is designed to help students attending either of the two West Bend high schools, with a preference given to students in single parent households.

DONOR ADVISED FUNDS

A donor advised fund is designed for those who seek active involvement in grantmaking. Each year an individual can make grant recommendations to support their favorite nonprofits locally, nationally or around the world.

Total # of new funds 23

Total # of funds* 517

Total market value of assets \$246,477,108

Actuant Community Outreach Fund

Agricultural Community for Adults with Autism Fund

Susan Kasten Brumder Fund

Christian Gap Fund

Virgis and Angela Colbert Family Foundation Fund

Dave and Becky Glyzewski Family Fund

Gerald J. Graff and Sally A. Graff Fund

George H. and Audrey E. Grove Charitable Fund

Housing Authority Scattered Sites II Endowment Trust Fund

Jane and Chris Kaltenbach Family Fund

Dan and Joanne Kline Fund

Linda Kunz & Bernard Hoffmann Fund

Paul P. Lipton Fund

Doris Masterson Family Fund

Milwaukee Continuum of Care Fund

Nonprofit Management Fund-Arts Support Fund

Oak Creek Cares Fund

Joseph R. Pabst Fund

Spaciel Family Fund

Martin F. Stein Fund

Stratton Fund

Winnie Fund

William and Carol Wuesthoff Family Fund

*Total includes Acorn Funds and partner foundation funds



NEW FUNDS

FUND HIGHLIGHT

WINNIE FUND

Bob Monday's intent with his donor advised fund is simple: that each generation learns to take nothing for granted and gives thanks for the blessings they have. Out of that gratitude comes joy and happiness and philanthropy is the understanding of this attitude. His nine grandchildren will serve

as the fund's advisers, becoming eligible once they reach the age of 10. The Milwaukee native is owner of Monday, Ott, Doherty & Associates and serves on the boards of Nativity Jesuit School, Ronald McDonald House Charities of Eastern Wisconsin and Messmer Catholic Schools.

FIELD OF INTEREST FUNDS

With a field of interest fund, an individual can support the causes they are most passionate about, such as the arts, the environment, health, or human services, without naming a specific organization.

Total # of new funds 5

Total # of funds* 143

Total market value of assets \$142,130,155

Classroom Innovation Fund: Crayons to Computers

Norman and Lucy Cohn Family Fund

Marvin W. Haesle Fund for the Arts

George H. and Virgilee F. Krueck Fund

Milwaukee Succeeds & MPS Tier Two Reading Pilot Program

*Total includes Acorn Funds and partner foundation funds



NEW FUNDS

FUND HIGHLIGHT

MILWAUKEE SUCCEEDS & MPS TIER TWO READING PILOT PROGRAM

The fund was created in partnership with the Northwestern Mutual Foundation to launch a targeted third grade reading pilot program at Gwen T. Jackson Elementary School, in alignment with strategies underway as part of Milwaukee Succeeds. The reading program offers teacher training, weekly coaching

and follow-up meetings with teachers and student assessment materials – all designed to ensure quality reading instruction and help increase third grade reading proficiency. Ultimately, the goal is to create a scalable model that can be introduced in multiple schools over time.

SCHOLARSHIP FUNDS

Individuals can help provide educational opportunities for tomorrow's leaders by creating a scholarship fund. Scholarships can provide one-time or multi-year support.

Total # of new funds **4**

Total # of funds* **108**

Total market value of assets **\$72,698,937**

Alverson Family MUHS Scholarship Fund

Celia's Starr Fund

Levester and Daisy Hall Scholarship Fund

Healing Choices Scholarship Fund

*Total includes Acorn Funds and partner foundation funds



FUND HIGHLIGHT

CELIA'S STARR FUND

The designated scholarship fund, created by Karen Wiltgen, celebrates the passion that her parents had for education and the desire they expressed for all 13 of their children to reach their dreams. Wiltgen is using her fund to instill that value in others by affording them the opportunity to reach dreams they otherwise didn't think were possible. Drawing inspiration from the

interests of her parents as well as the passions of her three children, the fund ultimately will provide financial aid to varied fields of study at the following institutions of higher education – University of North Carolina at Chapel Hill; St. Norbert College, Columbia College Chicago, North Carolina State University and University of Wisconsin-Madison.

UNRESTRICTED FUNDS

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

Total # of new funds 2

Total # of funds* 100

Total market value of assets \$85,464,487

GMF Centennial Grant Fund
Paula M. and Christ M. Gorde Fund

*Total includes Acorn Funds and partner foundation funds

Patrick Cudahy, one of the Foundation's founding fathers.

FUND HIGHLIGHTS

G M F C E N T E N N I A L G R A N T F U N D

In celebration of a century of inspiring philanthropy, serving donors and strengthening communities, the Greater Milwaukee

Foundation Board targeted a specific pool of funds that will be used for special centennial-themed grantmaking projects throughout 2015.

P A U L A M . A N D C H R I S T M . G O R D E F U N D

This unrestricted fund was created through the bequest of the late Paula Gorde, a longtime Milwaukee resident who emigrated from Jalisco, Mexico, to Wisconsin when she was 7 years old. Gorde was a passionate and tireless community advocate, serving as a block watch captain for many years in her south side

Milwaukee neighborhood and sheltering abused women and their children when they had no place to live. In addition to many years spent as a Spanish language interpreter in the court system, Gorde also ran Paula's Tap, a tavern near South 25th and West Scott streets with her husband, Christ.

LEGACY SOCIETY

Our Legacy Society recognizes those individuals who have entrusted us with carrying out their dreams and helping them leave their legacy by leaving a gift to us in their estate plan. This could be a bequest in a will, a beneficiary of an IRA or insurance policy, or through a charitable gift annuity.

NEW MEMBERS IN 2013

Anonymous

Jill Pelisek

Gayle Rosemann and Paul McElwee

Benita D. and John F. Clark

Richard M. Kaul

Mr. and Mrs. Gary A. Poliner

Elizabeth C. Battocletti

Nancy and Ray Retzlaff

Jim Ramaker

Lee E. Wille

\$370,269,000

Total amount in planned gifts the Foundation expects to receive from Legacy Society members

10

Total # of new documented bequests in 2013

14

Total # of new Legacy Society members in 2013

\$9,125,000

Total amount in planned gifts promised by new Legacy Society members

413

Total # of people who are members of our Legacy Society

PARTNER FOUNDATIONS

Through our partner foundations in Ozaukee, Washington and Waukesha counties, we provide services that help donors maximize their charitable giving and support the work of dozens of local organizations. Each partner foundation has a local advisory board that provides grantmaking and development insight. We provide administrative support and investment expertise that makes philanthropy easy and effective.

Total assets within the partner foundations: \$52,515,851

Total # of funds: 71



GREATER CEDARBURG FOUNDATION

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

Total assets: \$3,066,045

Total # of funds: 12

Total # of grants made: 43

Total amount of grants made: \$234,470



OCONOMOWOC AREA FOUNDATION

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

Total assets: \$8,596,484

Total # of funds: 23

Total # of grants made: 72

Total amount of grants made: \$436,790



WEST BEND COMMUNITY FOUNDATION

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

Total assets: \$40,853,322

Total # of funds: 36

Total # of grants made: 291

Total amount of grants made: \$2,341,517



Arts@Large



Midwest Bike Share



Menomonee Valley Partners



Lead2Change

2013 GRANTMAKING HIGHLIGHTS

We provide leadership and funding to help build a thriving and vibrant region through support of the arts, environmental concerns and human service programs. We also have a responsibility to use our position in the community and resources entrusted to us by our donors to confront complex issues and ensure that community residents' basic human needs are being met and that they thrive economically, academically and socially. Toward that end, our Board identified four key impact areas that will serve as the focal point of leadership and grantmaking initiatives over the next several years. The following pages reflect the grants of \$25,000 and above we made across those areas in 2013 and the strategies we are using for each.

FOUNDATION DIRECTED GRANTS

Total dollars

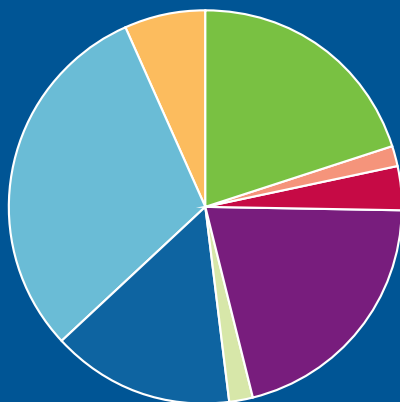
\$8,714,227

Total # of agencies supported

222

These grants reflect funding made from narrow and broad field of interest as well as unrestricted funds. The Foundation's Community Investment staff present grant recommendations on a quarterly basis to the Community Investment Committee, with ultimate approval of all grants made by the Foundation's Board.

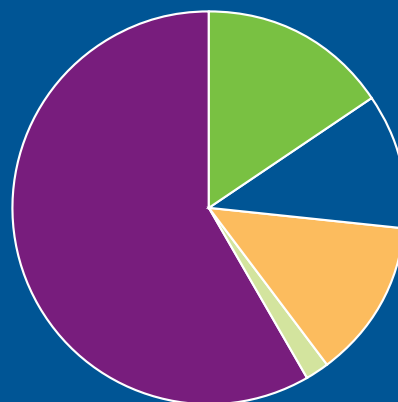
By program type



- Arts and culture: **\$1,234,600**
- Children, youth and families: **\$440,217**
- Community development: **\$1,002,850**
- Education: **\$1,293,127**
- Employment/training: **\$430,000**
- Environment: **\$285,250**
- Health and human services: **\$3,152,964**
- Other*: **\$875,219**

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

By impact area



- Strengthening education: **\$1,364,027**
- Strengthening neighborhoods: **\$955,350**
- Increasing economic opportunities: **\$1,142,290**
- Promoting racial equity and inclusion: **\$165,000**
- Strengthening regional vitality: **\$5,087,560**

IMPACT AREA

STRENGTHENING EDUCATION

GRANT STRATEGY

The Foundation has long supported efforts to improve education through scholarships and a wide variety of programs ranging from early literacy to college access. We have taken a leadership role in addressing the needs of Milwaukee's children by convening education, civic and business leaders to partner on Milwaukee Succeeds, a cradle-to-career effort that unites the community around a shared commitment of success for every child in every school. Our education-related grantmaking has supported several key strategies developed by the more than 300 organizations participating in Milwaukee Succeeds.

Total # of grants: **77**

Total dollar amount: **\$1,364,027**



MAKE A DIFFERENCE- WISCONSIN

\$25,000 GRANT

When it comes to budgeting and debt, recent data from the Consumer Financial Literacy Survey shows 61 percent of adults admit to not having a budget. One in three adults carries a monthly credit card debt. Forty-one percent

give themselves a C, D, or F on their knowledge of personal finance. Make a Difference-Wisconsin is working to bolster the knowledge and confidence level early on by working with teens.

A \$25,000 grant from the Kathryn Jane Wright, Norman and Ida Sinske and Clarence G. Reible funds supported the agency's recruitment efforts to find more teachers in 16 Milwaukee Public Schools to help teach its financial educational program for teens.



Blanca Sierra

PROGRAM

UNITED COMMUNITY CENTER
PRECOLLEGE PROGRAM

Started: 2004

Grant amount: \$75,000

Purpose: To help high school students with ACT test preparation, college admission and career counseling

IMPACT AREA | STRENGTHENING EDUCATION

College and career readiness programs build pipeline, promise for Milwaukee workforce

United Community Center staff believe it's never too early to start talking about college. That's why as part of daily morning announcements at its Bruce Guadalupe School, a student shares their college and career aspirations with their peers.

That wasn't always the focus. As little as 10 years ago, UCC concentrated mainly on helping students graduate from high school. With less than one

third of their parents having done so, it seemed like a major milestone. But leaders realized a diploma alone does not prepare students for a career and so over the years UCC has expanded its precollege programming to include ACT prep, college visits and bilingual parent and student workshops on topics such as financial aid.

"The most successful economically and culturally vibrant cities are

those that have highly educated populations," said Jackie Harcourt, UCC's director of development. "We truly believe we're building a strong future for Milwaukee."

UCC, along with College Possible Milwaukee and the Greater Milwaukee Committee, are three Greater Milwaukee Foundation-supported agencies that provide the necessary tools, intense preparation

and ongoing support to help students navigate the pathway to college and beyond.

“We know students have the potential if we arm them with the tools to get to their destination,” said Jeannie Fenceroy, senior program officer who manages the Foundation’s education grantmaking.

Alverno College senior Blanca Sierra is one of those students living out her potential. Her parents made it clear that not going to college was not an option. But she is the first in her family to do so. Sierra credits UCC with educating her family on the process. She now is serving as a role model for her nieces and nephews.

College Possible also works with first generation students. Both agencies provide rigorous ACT prep, knowing the higher the score students achieve, the more options they have and more likely they are to find a school that best fits their needs. Before taking what College Possible Executive Director Edie Turnbull calls “the real deal,” students will have taken a practice exam four times over the course of a year.

The agency, originally Admission Possible, started as a college access program. Yet obstacles remain once students enroll. Turnbull says it now provides additional coaching and support to help students through their college journey noting, “once you are in, the only way you can get out is by earning your degree.” Each year it sends about 300 students to college. Ideally, Turnbull said a relationship lasts from six to eight years, depending on life circumstances. This is the first year it will have participants graduate.

Knowing what students want to do beyond that time – and knowing which courses to take and colleges to attend to get them there – is just as significant. That’s where GMC’s My Life! My Plan! comes in. The career exploration program pairs high school freshmen with local employers like GE Healthcare to expose them to different opportunities. Through online career assessments, small group workshops, and onsite tours, students learn about in-demand careers. The program has engaged more than 400 coaches, taught nearly 1,700 students and become the cornerstone of Milwaukee Public Schools college and career readiness curriculum.

“If you don’t have anybody saying you need to stay with this because it is worth it, it is too easy to drop out,” Turnbull said. “We just refuse to let that happen.”



My Life! My Plan!

PROGRAM

MY LIFE! MY PLAN!

Started: 2012

Grant amount: \$20,000

Purpose: Connects education to business and students to career pathway information to make good career and postsecondary decisions

PROGRAM

COLLEGE POSSIBLE MILWAUKEE

Started: 2008

Grant amount: \$75,000

Purpose: To help high school students with ACT test preparation, campus visits and summer enrollment

IMPACT AREA

STRENGTHENING EDUCATION



Marquette University | Milwaukee Summer Reading Project

ALVERNO COLLEGE | \$100,000 in support of its *Promise and Power* capital campaign, which is designed to improve and increase classroom space through such projects as an expanded commons and six new multipurpose classrooms.

PUBLIC POLICY FORUM | \$100,000 (over two years) to expand its capacity to conduct education research.

LITERACY SERVICES OF WISCONSIN | \$75,000 (over two years) to help current students complete the five-test series for the General Educational Development certificate. The grant also will help the agency prepare clients for the new GED test.

MARQUETTE UNIVERSITY | \$75,000 to support the Milwaukee Summer Reading Project, an intensive six-week summer program that works with African American second through fourth graders who struggle with reading. The grant also will fund teacher training in the reading methodology.

AURORA FAMILY SERVICE | \$60,000 to provide supportive mental health services for children, their parents and teachers at four MPS schools: OW Holmes, Hopkins/Lloyd Community School, Wedgewood Park International School and Audubon Technology and Community Center.

BIG BROTHERS, BIG SISTERS OF METRO MILWAUKEE | \$50,000 to help the agency launch Mentor2.0, a mentoring program that combines in-person mentoring with online communication.

CITY YEAR MILWAUKEE | \$50,000 to fund stipends for corps members who work in schools throughout the city and mentor and tutor students in reading and math.

PAVE | \$50,000 to support coordination and expansion of Board Corps, a program designed to build board leadership capacity within schools.

SCHOOLS THAT CAN MILWAUKEE | \$50,000 to support coaching for its 80 school teachers in 25 schools in Milwaukee. The grant also will help fund creation of a leadership development program in partnership with Alverno College.

SHARP LITERACY | \$50,000 to expand its visual arts-based literacy program into St. Anthony School on Milwaukee's south side. The school, with 760 students, will be the largest school to participate in the nonprofit's programming.

EARLY MUSIC NOW | \$25,000 to help the nonprofit bring two internationally respected ensembles into the West Allis-West Milwaukee School District for extended music education residencies focused on Medieval, Renaissance and Baroque music.

GREATER MILWAUKEE COMMITTEE | \$25,000 to support Teachtown, its initiative designed to recruit and retain Milwaukee Public School teachers.

MILWAUKEE KICKERS SOCCER CLUB

| \$25,000 to help develop a social and emotional learning program for its America SCORES Milwaukee youth soccer players.

MILWAUKEE YOUTH SYMPHONY

ORCHESTRA | \$25,000 to support its Strings Initiative at Waukesha's Blair Elementary School, which provides music training in the violin, viola, cello or bass to fourth and fifth graders.

PLAYWORKS MILWAUKEE | \$25,000 to help fund implementation of its program at Dr. George Washington Carver Academy. The program, run by a full-time coach, incorporates play and physical activity throughout the school day and as part of after-school programs.

UNIVERSITY OF WISCONSIN-WAUKESHA

FOUNDATION | \$25,000 to support its Stay in School and Succeed program, which helps students of color, first generation and economically disadvantaged students increase their retention rate at the university.

WISCONSIN REGIONAL TRAINING PARTNERSHIP

| \$25,000 to help fund the Pathways to Prosperity pilot program as well as fund a youth coordinator position. The pilot will train 100 young adults from Bay View High School, Lynde and Harry Bradley Technology and Trade School, Alexander Hamilton High School and the School of Career and Tech Ed in the technical trades and place at least 75 in work-based learning experiences.



Playworks Milwaukee

IMPACT AREA

STRENGTHENING NEIGHBORHOODS

G R A N T S T R A T E G Y

Milwaukee contains many neighborhoods with different assets and unique characteristics. Some have thriving commercial areas and continue to attract new residents while retaining long-time ones. Others lack access to basic amenities such as fresh food and green spaces and have residents who are deeply impoverished. Then there are those middle market areas not viewed as prime opportunities for private real estate investment nor are they severely deteriorated. These areas are the focus of our Healthy Neighborhoods Initiative. Our approach is to target areas near a source of market strength, such as a strong neighborhood, major employer or public amenity, and use scarce public and philanthropic resources to leverage other investment. Our neighborhood work also seeks to build partnerships across neighborhoods to further leverage funds supporting resident leadership, public safety initiatives and addressing common citywide concerns.

Total # of grants: **23**

Total dollar amount: **\$955,350**



GRANTEE SPOTLIGHT

ACTS HOUSING

\$100,000 GRANT

Nearly 1,200 properties in Milwaukee are in tax foreclosure as a result of the housing meltdown that began in 2008. Some blighted, others unsafe, these homes sit vacant and pose a real threat to the vitality of the city's neighborhoods. ACTS Housing is actively working to address that challenge. Its

solution? Not to tear down houses, but rather to invest in neighborhoods by connecting interested individuals who face barriers to homeownership with the financial support and other resources needed to turn around otherwise challenged properties.

Six Foundation funds – Dr. Abraham B. and Irma F. Schwartz Fund, Marjorie Pazik Herrewig Memorial Fund, Florence Hart Greene Fund, Lorraine Albright Flint Fund, Connie Fischer/Family Foundation Fund and the Charles Edgar Albright and Laura Uihlein Albright Fund – provided a combined \$100,000 to support its work in the city.

IMPACT AREA

STRENGTHENING NEIGHBORHOODS

HEALTHY NEIGHBORHOODS INITIATIVE

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

REBUILDING TOGETHER GREATER MILWAUKEE

| \$75,000 to provide free housing repair and other accessibility modifications for older adults living within all neighborhoods participating in the Healthy Neighborhoods Initiative.

COMMON GROUND | \$50,000 for Milwaukee Rising, an effort to restore 100 homes in Milwaukee's Sherman Park neighborhood, which was severely affected by the foreclosure crisis. Nearly 50 homes have been rehabbed and 26 have been sold at the average price of \$107,000.

LAYTON BOULEVARD WEST NEIGHBORS | \$50,000 in support of the Healthy Neighborhoods Initiative in Milwaukee's Silver City, Burnham Park and Layton Boulevard neighborhoods.



Layton Boulevard West Neighbors

AGAPE COMMUNITY CENTER | \$45,000 in support of the Healthy Neighborhoods Initiative in Milwaukee's Thurston Woods, Fairfield and Old North Milwaukee neighborhoods.

HOUSING RESOURCES | \$45,000 to help underwrite tours of the Healthy Neighborhood Initiative areas for lenders and realtors to promote the livability of the neighborhood.

HAVENWOODS ECONOMIC DEVELOPMENT CORPORATION | \$44,500 in support of the Healthy Neighborhoods Initiative in Milwaukee's Havenwoods neighborhood.

SHERMAN PARK COMMUNITY ASSOCIATION | \$43,500 in support of the Healthy Neighborhoods Initiative in Sherman Park.

URBAN ANTHROPOLOGY | \$35,000 in support of the Healthy Neighborhoods Initiative in Lincoln Village and Baran Park neighborhoods on Milwaukee's south side.

UNIVERSITY OF WISCONSIN EXTENSION-WAUKESHA COUNTY | \$25,000 in support of the Healthy Neighborhoods Initiative in Waukesha's Tower Hill area.



Rebuilding Together Greater Milwaukee

BUILDING NEIGHBORHOOD CAPACITY PROGRAM

Milwaukee was selected to participate in a federally-supported program aimed at building resident capacity and leadership and helping distressed neighborhoods develop and implement plans to improve education, employment, housing, health and safety.

DOMINICAN CENTER FOR WOMEN | \$25,000 to help in the planning process for developing a neighborhood revitalization plan for Milwaukee's Amani neighborhood.

NEXT DOOR FOUNDATION | \$25,000 to cover the planning and implementation costs for the Building Neighborhood Capacity Program in Metcalfe Park.

NEIGHBORHOOD INVESTMENTS

UEC MVP PROJECT | \$100,000 toward From the Ground Up campaign to complete the redevelopment of the Menomonee Valley.

LISC MILWAUKEE | \$75,000 to support capacity building among nonprofits, leadership development among residents and nonprofit staff in Milwaukee neighborhoods, and support cross neighborhood collaboration.

SIXTEENTH STREET COMMUNITY HEALTH CENTER | \$70,000 (over two years) in support of ongoing efforts to engage residents in the ecological revitalization of the Kinnickinnic River Corridor.



Dominican Center for Women | Photo by Stanford C. Brookshire of S.I.B. Photography

GROUNDWORK MILWAUKEE | \$25,000 to hire summer youth workers and crew supervisors who will work in three Milwaukee neighborhoods – Metcalfe Park, Borchert Field and Harambee – to develop urban garden plots on blighted land.

MENOMONEE VALLEY PARTNERS | \$25,000 to help fund Menomonee Valley 2.0, a new plan that will guide the renewal and redevelopment efforts of the Menomonee Valley for the next decade.

URBAN ECONOMIC DEVELOPMENT ASSOCIATION OF WI | \$25,000 to support its work as lead coordinator of Take Root Milwaukee, which addresses the issue of foreclosures in the city.

IMPACT AREA

INCREASING ECONOMIC OPPORTUNITIES

GRANT STRATEGY

Wisconsin, like many other states, has been hit hard by the latest recession. Numerous economic indicators show signs of recovery; yet the number of jobs and family-supporting wages continue to lag. Prior to the recession, many segments of the community were working multiple jobs to make ends meet. The recession has further exacerbated struggles for economic security. We have an opportunity to target resources that assist families throughout the region to become more economically secure and work toward improved earnings as well as build a more stable financial foundation.

Total # of grants: 27

Total dollar amount: \$1,142,290



COMMUNITY WAREHOUSE

**\$50,000
GRANT**

Kitchen cabinets, vanities, mirrors, doors: these all are elements the Community Warehouse has used to help rebuild Milwaukee's neighborhoods, one household at a time. Since 2005, the nonprofit has sold donated home improvement materials at discounted prices to individuals, businesses and nonprofits. Recognizing that neighborhood revitalization takes

shape through many different ways, it launched a new contract services division called Milwaukee Working, which works with underemployed or never employed residents. Within its first year of operation, it employed nine full-time and six transitional employees in the areas of recycling, online book sales, light assembly and woodworking.

The Lynn B. and Pauline McKnight and Henriette S. Neverman funds provided a total of \$50,000 over two years to partially support an operations and facilities manager to oversee the new division.



PROGRAM

LA CASA DE ESPERANZA VITA PROGRAM

Started: 2005

Grant amount: \$100,000

Purpose: To expand its financial literacy and asset building program for participants seeking free tax assistance in the VITA program

Outcomes: 1,677 tax returns prepared; \$4.8 million in tax refunds and credits (2012/2013 tax season)

IMPACT AREA | INCREASING ECONOMIC OPPORTUNITIES

Programs take a comprehensive approach to boosting assets, building economic security

Ashley came to La Casa de Esperanza in 2008 for free help in preparing her taxes. Little did she know that merely five years later, she would have gained so much more.

What exactly? Beginning steps toward financial stability. The single mom of a 5 year old just graduated from college. Newly employed as a social worker, she had no savings,

had racked up \$22,245 in debt, and was not taking advantage of her employer's 401k program.

Through La Casa's Volunteer Income Tax Assistance/Asset Building program, Ashley met with a financial coach who helped her identify barriers she faced, set goals, and create an action plan. Since then, Ashley learned how to apply financial

management strategies, eliminated her debt, improved her credit score to 802, invested in her employer's 401K plan, and in 2013 purchased her first home.

"We are not trying to help people with just the issue at hand," said Karen Oates, La Casa's director of workforce development and financial stability. "We want to move people

out of poverty and away from financial instability. We don't want them stuck where they are."

For the past 12 years, these programs, run by La Casa in Waukesha County and Social Development Commission in Milwaukee County, have worked to build a bridge from a one-time benefit in the form of a tax credit or refund into long-term financial security. The Foundation has long invested in the programs, to the tune of more than \$2 million, viewing them as sound steppingstones to self-sufficiency.

"We had been working for years on family economic security but were interested in finding out more about how we could help individuals and families move out of poverty," said Janel Hines, director of grant programs who heads up the Foundation's grantmaking efforts toward increasing economic opportunities. "Programs like VITA and Individual Development Accounts are important lynch pins in our efforts."

SDC opened its VITA sites in 2002. La Casa introduced its program in 2005. The beauty of both is the wide range of resources offered. SDC, for example, provides screenings for FoodShare, information on energy assistance, and help creating a checking or savings account. Among its assortment of tools, La Casa offers housing assistance, free credit reports and most recently IDA match programs.

La Casa, with Foundation support and programming help from Wisconsin Women's Business Initiative Corporation, launched a pilot IDA program in 2013. It's the first of its kind in Waukesha and helps participants save toward furthering their education, starting a business or buying a home. In addition to ongoing financial coaching, participants' savings are matched on a two-to-one basis. Ashley, now a VITA volunteer, was one of 10 people to create a habit of saving through the program. She saved \$2,000 and received \$4,000 in a match to help purchase a home.

"We are not taking a short-term perspective; we are making a long-term commitment to financial stability and self sufficiency," Oates said.



WWBIC

PROGRAM

WWBIC "MAKE YOUR MONEY TALK" PROGRAM

Started: 2001

Grant amount: \$100,000

Purpose: To support asset-building program that provides individual development accounts and education

Outcomes: 210 active IDA holders with saving deposits of \$77,134 (2012)

PROGRAM

SOCIAL DEVELOPMENT COMMISSION VITA PROGRAM

Started: 2002

Grant amount: \$100,000

Purpose: To support a year-round financial literacy component that will include volunteer income tax assistance, financial wellness workshops and financial coaching.

Outcomes: 15,279 tax returns prepared; \$14.2 million dollars returned (2012/2013 tax season)

IMPACT AREA

INCREASING ECONOMIC OPPORTUNITIES

EMPLOYMENT

EASTER SEALS SOUTHEAST WISCONSIN |

\$75,000 to upgrade its workforce training center in Waukesha to include a computer lab as well as a commercial kitchen so it can expand its food service program.

MILWAUKEE AREA WORKFORCE FUNDING

ALLIANCE | \$50,000 as a partial match to leverage \$600,000 in funding from the National Fund for Workforce Solutions' Social Innovation Fund to support local workforce development programs.

AFRICAN AMERICAN CHAMBER OF COMMERCE

| \$40,000 to conduct an assessment of the African American business community in greater Milwaukee.

WISCONSIN COMMUNITY SERVICES |

\$40,000 to support the agency's Center for Driver's License Recovery and Employability, which provides case management and legal help to low-income Milwaukee County residents who have lost their driver's licenses for nondriving offenses.

PROJECT RETURN | \$35,000 to help 150 low-income formerly incarcerated men and women find permanent employment.

BIZSTARTS MILWAUKEE | \$25,000 to expand its ability to serve a greater number of start-up entrepreneurs. Since starting in 2008, BizStarts has helped more than 25 companies launch, with at least 205 jobs created.

CENTER FOR SELF-SUFFICIENCY | \$25,000 to help the agency work with former offenders in securing and maintaining employment.

GRAND AVENUE CLUB | \$25,000 to support transitional employment opportunities for individuals who experience mental illness.

THE STUDENT CONSERVATION ASSOCIATION |

\$25,000 to support the Milwaukee Conservation Leadership Corps School Year Program, which employs high school students in conservation-related projects.

UNITED WAY OF GREATER MILWAUKEE | \$25,000 in support of its Transitional Jobs policy program, which helps create employment opportunities for hard-to-place workers.

URBAN ECONOMIC DEVELOPMENT ASSOCIATION OF WISCONSIN | \$25,000 in support of a three-year pilot project that would coordinate transportation-related services now operated by several agencies and effectively create a central hub of transportation information and access.



Wisconsin Community Services

ACCESS TO BENEFITS

COLUMBIA ST. MARY'S (on behalf of the Milwaukee Health Care Partnership) | \$50,000 to contract with a statewide health care enrollment education and outreach organization called Covering Kids and Families. The organization will help the local public/private consortium conduct a consumer education and outreach campaign specifically for local health care organizations, community clinics and other health care enrollment professionals so they can assist low-income and uninsured individuals with the new coverage options.

MILWAUKEE HEALTH DEPARTMENT | \$50,000 to hire two additional health access assistants for its Community Healthcare Access Program. The assistants will provide education, outreach, enrollment and other assistance for about 1,500 low-income residents during the open enrollment period for the federal health insurance exchange.

BASIC NEEDS

GUEST HOUSE OF MILWAUKEE | \$75,000 to support interior and exterior capital improvements to its 117-year-old facility, including new plumbing and fixtures, new heating and cooling units and an updated security camera system.

FAMILY PROMISE OF WASHINGTON COUNTY | \$60,000 to cover renovation costs associated with the development of eight permanent supportive housing units in a building located near downtown West Bend.

PATHFINDERS MILWAUKEE | \$30,290 to help replace the roof and gutters on its emergency shelter.



Guest House of Milwaukee

PATHFINDERS MILWAUKEE | \$30,000 to support Q-BLOK, a program that provides housing, case management, mentor families and other services to LGBTQ adults ages 18 to 35 in Milwaukee at risk for homelessness.

THE CATHEDRAL CENTER | \$25,000 to expand its Community Case Management program to serve single women and provide early and easy access to resources and services that help them avoid shelter stays and expedite acquisition of permanent housing.

COMMUNITY ADVOCATES | \$40,000 to support a program coordinator to oversee its Elder Abuse Intervention Project.

IMPACT AREA

PROMOTING RACIAL EQUITY AND INCLUSION

GRANT STRATEGY

We are fully committed to leading and supporting all aspects of inclusion and diversity in our communities as well as addressing disparities based on race. An active and intentional dedication to racial equity and inclusion is essential to developing a vibrant 21st century community, reflects the realities of our region and our country, and is important to future economic development and sustainability. We will continue to promote the benefits of a multi-faceted approach to supporting and enhancing equity and inclusion in our communities.

Total # of grants: 8

Total dollar amount: \$165,000

GRANT MAKING HIGHLIGHTS

CREAM CITY FOUNDATION | \$30,000 to conduct a needs assessment of the lesbian, gay, bisexual and transgender community in southeastern Wisconsin in conjunction with the Center for Urban Initiatives and Research and McAlpine Consulting for Growth.

MILWAUKEE LGBT COMMUNITY CENTER | \$25,000 to support its program director position.

YWCA OF GREATER MILWAUKEE | \$25,000 to support its racial justice programming.



Vel Phillips at the Wisconsin State Capitol, 1961, courtesy Wisconsin Historical Society

WISCONSIN PUBLIC TELEVISION

\$25,000 GRANT

Gracious persistence. That quality has prepared and propelled Vel Phillips into accomplishing many firsts in her career on behalf of women and people of color. Whether leading the way for women in the legal profession or leading the march for fair housing in Milwaukee, Phillips has been

a trailblazer for thousands throughout her 90 years. Wisconsin Public Television will capture the essence of this true Milwaukee treasure in “Vel Phillips: Gracious Persistence,” an hour-long documentary that will air on Wisconsin Public Television and Milwaukee Public Television.

A \$25,000 grant from the Harvey E. and Harriette V. Vick Fund, a field of interest fund supporting Wisconsin history, is helping fund the project’s production.

REGIONAL VITALITY

GRANT STRATEGY

The Foundation is fully committed to enhancing the quality of life for those who live and work in the greater Milwaukee region. A thriving community is one that invests in arts and culture that stimulates the senses while engaging one's imagination; protects our natural environment while promoting the green economy and reducing the carbon footprint through education, conservation and preservation; and engages strong nonprofits and active academic partners in research to improve the health and longevity of all residents.

Total # of grants: 209

Total dollar amount: \$5,087,560



FIRST STAGE CHILDREN'S THEATER

**\$25,000
GRANT**

At First Stage Children's Theater, staff members often recite the familiar tagline: "There are no cool kids at First Stage. There are ONLY cool kids at First Stage." So whether a student is at the top of his class or whether she is the last to be picked, differences don't matter. All students are

given the same outlet and opportunities to be themselves and learn important life skills through stage skills. The professional children's theatre began offering the same kind of opportunity for children with autism in 2012 through a specially-designed class called "Next Steps."

A \$25,000 grant from the Carl and Lora Otjen Family Fund, Gerda A. Debelak Fund, and Jean and Dennis Bauman Fund helped the nonprofit expand the program beyond the initial summer session.



"Our job is to provide the evidence to say this is what people should be doing."

- Joe Carroll

REGIONAL VITALITY

Medical College research holds promise for preemies

Every Wednesday morning at Children's Hospital Neonatal Intensive Care Unit, Deborah Costakos, MD, spends time making sure one fewer premature infant goes through life without the gift of sight.

The pediatric ophthalmologist studies retinas of babies born as early as 23 weeks and weighing as little as 1 pound to see if certain abnormalities are present that might lead to retinopathy of prematurity. ROP, abnormal blood vessel development that can lead to blindness, affects 80 to 90 percent of preemies but causes blindness in one of every 100. Costakos heads up Children's ROP program and has conducted most of the screenings in Milwaukee over the past decade.

But with the current standard technology, subtle details can easily be missed. In fact, Costakos said, 20 percent of the time doctors fail to catch the issue and seek appropriate treatment in time. Blindness is the result. She feels that simply is unacceptable, particularly for babies who already have the odds stacked against them so early in life.

Right next door, Joseph Carroll, Ph.D., co-director of the Medical College of Wisconsin's Advanced Ocular Imaging Program, studies how the retina develops. The Eye Institute, where the program is housed, is one of few places nationwide with imaging technology capable of capturing high resolution images in these infants. What he was missing was a clinical partner with whom he could translate this application into meaningful patient care.

Costakos' frustration, Carroll's curiosity and the technology's capabilities, combined with chance and circumstance, led to an imaging-based screening research project that aims to give physicians a more detailed view of the eye, lead to improved treatment and ultimately reduce the chances of vision loss for preemies. Support from the Russell J. and Betty Jane Shaw Fund allowed the pair to take their collaboration to the next level.

"It is one of these things where you look at the pieces that have to be in place and if you remove any one of them, it is not going to work,"

Carroll said. "If we were doing this anywhere else and didn't have a physician who was receptive and passionate about this and in a city that didn't have something like the Greater Milwaukee Foundation, none of this would happen."

They are creating a database of retinal images that will help them study signs leading to ROP. Central to building that database is introducing the optical coherence tomography technology to neonatal intensive care units. They are creating relationships with area hospitals to build up the volume of data and ultimately hope to impact the standard of care.

"Why should where you are born dictate whether you might benefit from having access to this technology?" Carroll said.

It might take years to make that kind of paradigm shift. But both remain confident and committed.

"Even if I don't get to the answer first, if it inspires someone to get the answer first, I'm OK with that," Costakos said.

PROGRAM

MEDICAL COLLEGE OF WISCONSIN
EYE INSTITUTE

Started: 2009

Grant amount: \$300,000 from the Russell J. and Betty Jane Shaw Fund
Fund Purpose: To advance research toward a screening tool that would aid premature infants with vision loss

REGIONAL VITALITY



Museum of Wisconsin Art

ARTS AND CULTURE

MUSEUM OF WISCONSIN ART | \$125,000 (over three years) to support the museum's curatorial and educational programming.

MILWAUKEE SYMPHONY ORCHESTRA | \$100,000 as a challenge grant to help stabilize and position the organization for long-term sustainability.

CEDARBURG ART MUSEUM | \$63,000 to install a sprinkler system.

MARCUS CENTER FOR THE PERFORMING ARTS | \$50,000 to renovate Vogel Hall's lobby area and interior.

UNIVERSITY OF WISCONSIN-MILWAUKEE FOUNDATION | \$50,000 toward the digital image

content and development of the online edition of Encyclopedia of Milwaukee, a multi-year, multimedia project providing a comprehensive history of metro Milwaukee.

ARTS@ LARGE | \$25,000 to fund artist residencies at eight K-8 Milwaukee Public School sites during the 2013/2014 school year. The residencies will feature internationally acclaimed artist Faith Ringgold, whose artistic explorations over many decades have focused on issues of race, civil rights and inclusivity, and Andrea Skyberg, a local illustrator and bookmaker.

GREATER MILWAUKEE COMMITTEE | \$25,000 to help implement TypeFace, a collaborative public art project between artists Reginald Baylor and local storyteller Adam Carr that will be on exhibit within Milwaukee's Layton Boulevard West, Sherman Park, Lindsey Heights and Harambee neighborhoods.



Greater Milwaukee Committee | TypeFace

AFRICAN AMERICAN CHILDREN'S THEATRE, HANSBERRY-SANDS THEATRE COMPANY, KO-THI DANCE COMPANY, AND TESSA'S BLACK ENTERTAINMENT & YOUTH CENTER

| \$25,000 each to help the four organizations create a plan for sustaining African American performing arts in greater Milwaukee.

MILWAUKEE COUNTY HISTORICAL SOCIETY

| \$25,000 to provide operating support as it moves toward its strategic transition to diversify its membership and exhibits.

MILWAUKEE PUBLIC LIBRARY | \$25,000 to support public art for the exterior of the new Milwaukee Public Library's East Branch.

UNIVERSITY OF WISCONSIN-MILWAUKEE

| \$25,000 for the third phase of building out its Digital Craft Research Center Rapid Prototyping Lab.

CHILDREN, YOUTH AND FAMILIES

LEAD2CHANGE | \$100,000 (over two years) to help with the organization's transition to a philanthropic partner organization.

COALITION FOR CHILDREN, YOUTH & FAMILIES | \$82,000 (over two years) to support succession planning in anticipation of its longtime CEO's retirement in 2016.

THE FRIENDSHIP CIRCLE | \$40,000 to expand programming for children with special needs

and their families throughout Milwaukee by partnering with more area schools and community centers.

RUNNING REBELS | \$25,000 for Pipeline to Promise Educational Services for Adjudicated Youth.

COMMUNITY DEVELOPMENT

CITY OF MILWAUKEE | \$125,000 that will enable the Milwaukee Health Department to create a Community Safety Data Hub.

NONPROFIT CENTER OF MILWAUKEE | \$40,000 to support its efforts to enhance membership for nonprofits.



The Friendship Circle

REGIONAL VITALITY

ENVIRONMENT

RIVER REVITALIZATION FOUNDATION | \$60,000 to renovate an office and outreach center that will serve as the southern entrance to the Milwaukee River valley and Milwaukee Rotary Centennial Arboretum.

MEQUON NATURE PRESERVE | \$25,000 toward the scraping of wetland and removal of drain tile and invasive species, such as buckthorn, in an 18-acre wetland and hardwood forest.

HEALTH AND HUMAN SERVICES

ST. AEMILIAN-LAKESIDE | \$450,000 (over three years) to support efforts toward improving child welfare outcomes through trauma-informed care.

HUNGER TASK FORCE | \$100,000 to redevelop a historic granary building into a community education center at its Franklin farm and fish hatchery.

ST. ANN CENTER FOR INTERGENERATIONAL CARE | \$100,000 to the nonprofit in support of its capital campaign for a new 80,000-square-foot facility on Milwaukee's north side.



St. Ann Center For Intergenerational Care
South Elevation Facing North Avenue

UNIVERSITY OF WISCONSIN-MILWAUKEE FOUNDATION | \$100,000 for the Center for Aging and Translational Research.

WISCONSIN PARKINSON ASSOCIATION | \$100,000 in support of the Parkinson Research Institute, a research center focused on finding the cause of Parkinson's disease.

CHILDREN'S HOSPITAL AND HEALTH SYSTEM FOUNDATION | \$50,000 toward developing therapies to treat pulmonary hypertension in newborns.

MEDICAL COLLEGE OF WISCONSIN | \$50,000 to support research that ultimately may lead to the development of a new drug that could slow the progression of multiple sclerosis.

REPAIRERS OF THE BREACH | \$50,000 to cover the costs of repairing the south and east facades of its building on Vliet Street to meet occupancy permit requirements.

PROGRESSIVE COMMUNITY HEALTH CENTERS | \$43,500 to help cover the cost of equipment and technology for its expanded women's health services.

FROEDTERT HOSPITAL FOUNDATION | \$25,000 to support program incentives for participants in its Pathway to Parenthood program for expectant parents that links health education with prenatal health care.

**SCHLITZ
AUDUBON
NATURE
CENTER**

**\$45,000
GRANT**

It's only been around southeastern Wisconsin area for six years, but in that time, the emerald ash borer has packed a mighty punch and really made its presence known. The pesky exotic little beetle threatens the bucolic backdrops of Wisconsin's landscape, including the Schlitz Audubon Nature Center,

particularly its 185-acre outdoor classroom that the center relies on for natural science education and which draws 145,000 visitors and 27,000 children annually. Diseased trees have been found within 5 miles of the center and 10 acres of its land have a high concentration of ash trees.

A \$45,000 grant from the Louise Uihlein Snell Fund helped the center begin a two-year, 10-acre reforestation project to remove the damaged trees, clear the land for replanting and work with students from the Student Conservation Association.

REGIONAL VITALITY



Milwaukee Public Museum | Spark!

JEWISH FAMILY SERVICES | \$25,000 to enable the organization to continue to offer its sliding fee scale to older adults not covered by publicly-funded aging programs so that they can receive the supportive services necessary to remain living independently.

LEGAL AID SOCIETY OF MILWAUKEE | \$25,000 to recruit additional volunteers for its Guardianship, Advocacy, Instruction and Networking Project. The project recruits and trains volunteers who then serve as court-appointed guardians for people with disabilities.

MEDICAL COLLEGE OF WISCONSIN | \$25,000 for the Breast Cancer Fatigue Research Project.

MILWAUKEE PUBLIC MUSEUM | \$25,000 (over two years) to help the museum expand its Spark! program to serve more people with Alzheimer's disease and their caregivers.

PLANNED PARENTHOOD OF WISCONSIN | \$25,000 to implement culturally competent reproductive health outreach programming for Latino families.

WAUKESHA COUNTY COMMUNITY FOUNDATION | \$25,000 for women and girls programming.

YMCA OF METROPOLITAN MILWAUKEE | \$25,000 for a diabetes prevention program at the Northside YMCA.

OTHER

PLANNING COUNCIL FOR HEALTH AND HUMAN SERVICES | \$50,000 (over two years) to create an evaluation institute that will help Milwaukee nonprofits incorporate evaluation principles and strategies so they can better determine the impact of their programs.

MIDWEST BIKE SHARE | \$25,000 in support of the launch of the bike sharing program in Milwaukee.

GRANTEE SPOTLIGHT



BREAD OF HEALING CLINIC

\$25,000 GRANT

Bread of Healing Clinic has garnered a reputation over the past 14 years as an important safety net for low-income people in Milwaukee who have chronic health conditions but cannot afford or access quality health care. The neighborhood-based free medical clinic

sees more than 1,200 uninsured adults annually. With oral health so closely linked to the overall health and well-being of individuals, the clinic began to offer dental services on a pilot basis to address the gap in affordable dental care.

A \$25,000 grant, through the generosity of the Pain, Clifford J. and Victoria M. Zahn and Marvin and Anne Burmeister funds, enabled it to continue its oral health care services beyond the pilot phase and address otherwise untreated oral health issues in its existing patient population.

INVESTMENT PERFORMANCE

LOOKING PAST A CRISIS

The fifth anniversary of the Lehman Brothers bankruptcy was marked in late 2013. Looking back at this tumultuous period, we are struck by the dichotomy between the ongoing level of concern that virtually all investors felt back in 2008 and the strong gains that well-diversified portfolios have produced since then.

We are particularly proud of the results that the Greater Milwaukee Foundation achieved with a cumulative five-year return through Dec. 31, 2013 of approximately 91 percent or 13.8 percent per year. This was capped off by a 17.5 percent gain for 2013.

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

At the same time, investing capital for the long-term benefit of the greater Milwaukee community demands that we look forward. After nearly five years of strong market gains, other investors have become more optimistic. On the surface, this is good news as markets are less volatile and therefore provide less to worry about on a day-to-day basis. However, periods of calm can also increase risk and limit future gains.

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

We live in a complex time where the volatility of economic conditions may be quite elevated. As such, poor outcomes are quite likely for those who do not consider what might go wrong. It is for this reason that the



Dave Kundert
Chair, Investment Committee



Mike Miller
Managing Director, Colonial Consulting

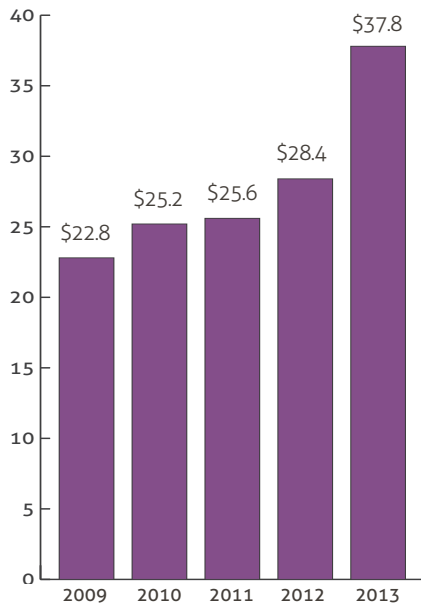
Foundation will continue to remain highly cognizant of risk, willing to address the various scenarios with a thoughtfully constructed portfolio and steadfastly committed to maintaining a long-term view that emphasizes contrarian thinking.

INVESTMENT RETURNS for the period ending 12/31/2013

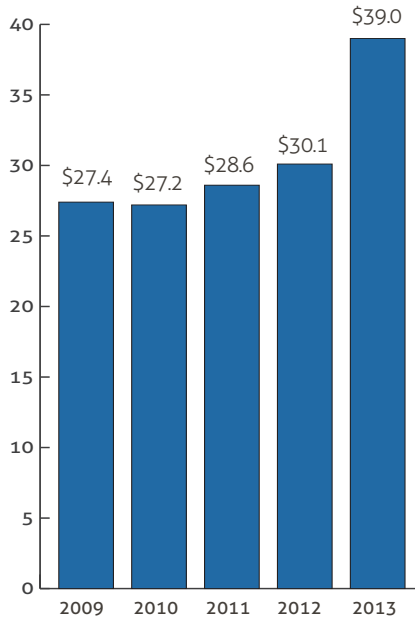
	1 year	3 year	5 year	7 year	10 year
GMF Investment Pool	16.7%	9.8%	13.6%	6.0%	7.6%
U.S. Bank Trust Pool	17.2%	9.6%	13.6%	6.1%	7.7%
BMO Harris Bank Trust Pool	20.2%	9.8%	13.8%	5.8%	7.5%
JPMorgan Chase Trust Pool	17.2%	10.1%	14.7%	6.7%	8.2%
S&P 500	32.4%	16.2%	17.9%	6.1%	7.4%
Morningstar Moderate Allocation	16.0%	8.9%	12.4%	4.5%	5.7%

FINANCIALS

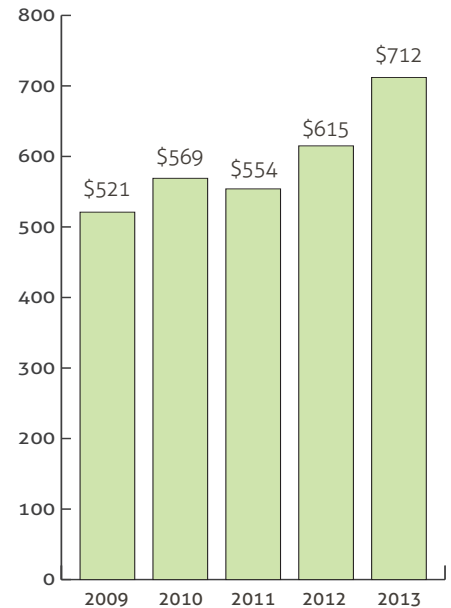
GIFTS (in million \$)



GRANTS (in million \$)



ASSETS (in million \$)



TOTAL # OF FUNDS

1,194

TOTAL # OF GRANTS AWARDED

3,807

GRANTS RANGED FROM

\$50-\$1,022,112

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

CELEBRATING CIVIC VOLUNTEERS

The Greater Milwaukee Foundation's three civic awards celebrate the passion and commitment of their namesakes in striving to make the greater Milwaukee community a stronger and more vibrant area to live, work and play.

WILLIAM C. FRYE AWARD

Honoring individuals whose volunteer efforts contribute toward the betterment of the community



DAN BADER

As president and CEO of the Helen Bader Foundation, Dan Bader is carrying out the vision of his late mother as well as leaving a legacy of his own. The private foundation has given more than \$225 million in grants to help strengthen the areas of youth development, workforce development and aging and Alzheimer's in greater Milwaukee and beyond since its inception in 1992.

FRANK KIRKPATRICK AWARD

Recognizes individuals whose efforts lead to physical improvements in the community



JULI KAUFMANN

Juli Kaufmann is passionate about sustainability and creating a positive long-term impact in her hometown. Through her company, Fix Development LLC, and her leadership efforts with other groups such as the Mayor's Green Team, Midwest Bike Share and Wisconsin Green Building Alliance, she is helping create a city that is healthy, thriving and viable for all.

DOUG JANSSON LEADERSHIP AWARD

SPONSORED BY BMO PRIVATE BANK

Recognizes local nonprofit leaders, particularly those serving underserved communities

VICTOR BARNETT

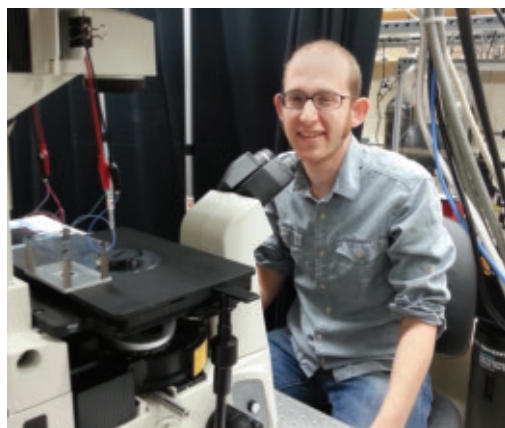
Victor Barnett, founder and executive director of Running Rebels Community Organization, is strengthening the future of Milwaukee's youth through his agency, which provides job/skills training, mentoring, positive activities and scholarships.





SHAW SCIENTIST AWARDS

Unrestricted funding. Those words are less commonplace now more than ever in the lexicon of scientific researchers. But thanks to the Foundation's Shaw Scientist Award program, researchers at the University of Wisconsin-Madison and University of Wisconsin-Milwaukee have access to such flexible funding. The annual program awards \$200,000 in unrestricted money to young scientists to advance their groundbreaking research in the fields of biochemistry, biological sciences and cancer research. Two UW-Madison researchers won the coveted award in 2013.



RANDALL GOLDSMITH

Randall Goldsmith, assistant professor in UW-Madison's Department of Chemistry, studies how single molecules move and contort. With the financial support of the award, Goldsmith specifically will study a protein called Tau, which he describes as one of the "villains in Alzheimer's disease." By learning more about how Tau works and what properties make it toxic, Goldsmith said new potential therapeutic pathways can be created.



RUPA SRIDHARAN

Rupa Sridharan, assistant professor in UW-Madison's Department of Cell & Regenerative Biology, studies what determines a cell's fate and how a cell can be reprogrammed to have a different function. Less than .1 percent of cells that make up an organism actually are successfully converted into reprogrammed cells that are like embryonic stem cells in nature. By studying the barriers to conversion and improving the efficiency of the process, Sridharan's research can lead to the creation of a greater number of reprogrammed stem cells, which can then lead to more potential applications for regenerative therapy.

The annual program awards **\$200,000** in unrestricted money to young scientists to advance their groundbreaking research in the fields of biochemistry, biological sciences and cancer research.

HERBERT J. MUELLER SOCIETY

The Greater Milwaukee Foundation and the greater Milwaukee community are fortunate to have so many attorneys, accountants, financial planners and other professional advisers who take a personal interest in their clients' charitable goals and help them fulfill their philanthropic visions. The Herbert J. Mueller Society is our way of saying thank you to such advisers who have recommended a fund at the Foundation as an option for their charitably minded clients. In 2013 we welcomed 26 new members to the society, which now numbers 265 individuals.

John A. Affeldt | Affeldt Law Offices, S.C.
Reuben Bankier | Northwestern Mutual
Brian D. Behl | Lake Country Wealth Management
Douglas A. Blegen | Douglas A. Blegen S.C.
Shannon L. Brusda | Godfrey & Kahn S.C.
John A. Caucutt | Law Office of John A. Caucutt
Karen J. Coy-Romano | Solutions Limited
Joseph B. Dailey | SJA Financial Advisory, LLC
Thomas J. Drought | Davis & Kuelthau, S.C.
Jerry J. Faust | Edward Jones
Scott Grenier | Robert W. Baird & Co.
Thomas P. Guskowski | von Briesen & Roper, S.C.
Mark F. King | King Legal Group S.C.
Jason Kohout | Foley & Lardner LLP
William L. Komisar | Komisar Brady & Co. LLP
Angela Krause-Lane | Robert W. Baird & Co.
Amy J. Krier | Certus Legal Group, Ltd.
Douglas Marconnet | Bridgewood Advisors, Inc.
Martin S. Matsoff | Northwestern Mutual Life
Patrick Mehigan | Deloitte Tax LLP
Gary J. Perrault | UBS Financial Services Inc. – The Perrault Group
Janet F. Resnick | Resnick & Yamat SC
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Deborah M. Robb | Schenck SC
Elizabeth Ruthmansdorfer | Moertl, Wilkins & Campbell, S.C.
Victor M. Torres | Northwestern Mutual Financial Network

HERBERT J. MUELLER SOCIETY OUTSTANDING PROFESSIONAL ADVISER AWARD



As estate planners like **Kathy Lambert** know, most people don't relish thinking about their own death or incapacity. But raise the question of charitable giving, she says, and all of a sudden "their faces brighten up and ideas start to flow."

"That's a pretty darn good feeling," said Lambert, a founding member of the Herbert J. Mueller Society and winner of the 2013 Herbert J. Mueller Outstanding Professional Adviser Award. The award recognizes members who have gone above and beyond to help the Foundation and their own donors give back to the community.

Lambert credits the Foundation, with which she became acquainted 15 years ago, as helping her feel comfortable with incorporating the topic of philanthropy into conversations with clients. First through Whyte Hirschboeck Dudek and now through her own private practice, Lambert Law, Lambert has made dozens of referrals to the Foundation over the years, many of which have resulted in lifetime and deferred gifts. She also regularly speaks about the importance of planned giving to other attorneys and nonprofits through such associations as the Milwaukee Estate Planning Council and Partnership for Philanthropic Planning.



IN MEMORIAM

A social worker and avid environmentalist. An industrial engineer and West Bend Rotarian. A longtime Junior Leaguer. An entrepreneur and Army Air Corps veteran. These short descriptions capture only a small fraction of the personalities, passion, philanthropists and personal friends whom we lost in 2013. We cherished our relationships with them and celebrate the legacies they leave behind.

Grant Beutner	Carol Jansen	Dolores Schlossmann
Franz Bidinger	Irene Kubena	William J. Shane
Lucile Cohn	Virginia C. Levenhagen	Ivan Steingart
Marilyn (Joyce) Gardner	Harold Luedeman	Kenneth A. Stoll
Willis W. Gardner	Mrs. Douglas McKey	Linda B. Voeks
Robert J. Griffin	Gordon Perry	Jeffrey D. Weis
Sharon Grows	Doris R. Redmond	Ella Wiberg
Mary Lee Jacobs	Nancy Retzlaff	Pat Wilmeth

HERBERT J. MUELLER SOCIETY MEMBERS

In 2013, the Foundation lost three members of our Herbert J. Mueller Society – **Robert G. Alexander**, **Keith A. Christiansen** of Foley & Lardner, and **Peter Brusky** of Brusky, Sjostrom, & Alberts, S.C. All three men were longtime members of the society, wonderful Foundation friends and very active in promoting philanthropy with their clients.

We cherished our relationships with them and celebrate
the legacies they leave behind.

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Mary B. Read

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DORI CHORTEK

In March 2014, we lost
a passionate donor,
community leader,
Foundation supporter,
and longtime friend.

Dori Chortek, 89,
shared her talents and

passion for Milwaukee with more than 50
agencies, including the Milwaukee Center for
Independence and Milwaukee Jewish Federation.
She spent 11 years on our Board, including two
years as vice chair and two years as chair, and
shared her grantmaking expertise as a member
of our Community Investment Committee for
several years. She led an accomplished life and we
treasure the incredibly valuable contributions she
made to Milwaukee.



NED BECHTHOLD

Ned Bechthold, a longtime
donor and successful
and dedicated business
leader, passed away in
May 2014. Bechthold,
77, had a deep-rooted
passion for Milwaukee's
underserved communities

and demonstrated that through active service with
the Boys & Girls Clubs of Greater Milwaukee, Next
Door Foundation and SHARP Literacy, among
others. He gave so much of his time, talent and
leadership to numerous boards, including the
Foundation. We will be forever grateful for his
commitment and compassion.



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LEADERSHIP & LEGACY



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Fran Kowalkiewicz, Program & Grants Associate
Liliane McFarlane, Grants Manager
Darlene C. Russell, Senior Program Officer
Carol Wilson, Scholarship & Program Coordinator

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Marybeth Budisch, Philanthropic Adviser
Will Janisch, Philanthropic Adviser
Jennifer Krueger, Philanthropic Services Associate
Andrea C. Ogden, Philanthropic Services Manager

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Mike Soika, Director
Audra Brennan, Network Coordinator
Lorna Dilley, Data Manager
Kia Towns, Administrative Assistant

PHOTO CREDITS

Photos by Jim Moy on pages 2, 5, 8 (Waukesha County Community Dental Clinic, Winnie Fund, Bucyrus Foundation), 10, 17, 19, 21, 23, 29 (Oconomowoc Area Foundation and West Bend Community Foundation), 30 (Menomonee Valley Partners), 34, 35, 39, 40, 43, 44, 54 (Museum of Wisconsin Art), 57, 59, 60, and 62

pg 8 and 15 | Oak Creek Cares photo by photographer Dianne Hofmann

pg 11 | Lucy Cohn photo in Arlington National Cemetery: Joe Dean/Stars and Stripes Honor Flight

pg 41 | Dominican Center for Woman photo by Stanford C. Brookshire of S.i.B. Photography

pg 49 | Vel Phillips at the Wisconsin State Capitol, 1961 Courtesy Wisconsin Historical Society

pg 64 | Kathy Lambert photo by John Saller

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