

a magazine for friends of the GREATER MILWAUKEE FOUNDATION

# GREATER together

philanthropy THANKFULNESS  
COMMUNITY LOVE  
caring GIVING  
*Generosity*  
humanity



Greater Milwaukee  
FOUNDATION  
*greater together*

Volume 2 Issue 2 Fall 2017

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Fall 2017



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# GREATER together

A MAGAZINE FOR FRIENDS OF THE  
GREATER MILWAUKEE FOUNDATION  
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**VISION** Greater Milwaukee becomes a vibrant, economically thriving region comprised of welcoming and inclusive communities that provide opportunity, prosperity and a high quality of life for all.

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*Donors David and Deborah Hoffman were among the nearly 30 people who attended the Foundation's GMF Presents donor series at the United Community Center in October. The series informs donors about bright spots in our community and opens up new opportunities for giving.*

# PRESIDENT'S MESSAGE

I appreciate random acts of kindness, and I absolutely love deliberate acts of generosity.

This is the nature of giving we advance through the Greater Milwaukee Foundation and we see consistently from our community of donors.

Philanthropy is born where passion, purpose and knowledge intersect. For the compassion in our heart to meet its promise, we must complement it with an informed approach.

For several years in a row now, metro Milwaukee has had the highest percentage of residents (64.7 percent most recently) donate \$25 or more annually to charity among 15 comparable regions. As the region's largest community foundation, we can apply our expertise and experience to help donors best translate that tremendous generosity into expanded opportunities and a higher quality of life for everyone. Ultimately, making a difference for others is at the center of why anyone gives. We are all moved to action by our love for greater Milwaukee and the people who breathe life into its communities.

Our hearts are lifted by the growing economic vitality of our region but also deeply troubled by those left out and left behind. Our region exhibits stark disparities, where opportunities and life outcomes can vary drastically depending on your race, ZIP code or family income.

Giving alone is not enough to reverse these inequities, but by learning together, working together and investing together, we can accelerate next-generation ideas for achieving our shared vision of a thriving region. There are so many bright spots that forecast our community's potential. As you read this edition of the magazine, I encourage you to celebrate our region's heart by supporting our wonderful community assets and to consider partnering with the Foundation to address some of our most pressing challenges. Together we always do the most good possible.

Ellen M. Gilligan  
President & CEO  
Greater Milwaukee Foundation

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*Translating*  
GENEROS  
*into opportunity*





# ITY

Many of us know of the forefathers who created the communities we call home, but do you know that philanthropy also has played a huge role in their development?

Philanthropy is one of the main architects, transforming individuals, organizations and entire sectors in a multitude of ways. Philanthropists' love for community and their generous spirit gives thousands of promising students the pathway and opportunity to become our community's future leaders. Nature preserves, parks and recreational programming thrive with philanthropic dollars. Our donors' passion and foresight have also brought about changes in research, public policy and innovative ideas addressing community issues.

Over time, the roots of philanthropy spread deep and wide among all areas of our community and leave long-lasting effects on its overall quality of life. Our cover story highlights examples from three different sectors — education, the arts and health care — of how philanthropy has shaped the trajectory of our region.

# *Look what* GENEROSITY *can do*

**W**alter Bond wants to correct a misconception about Teach for America, the national program that recruits recent college graduates to teach in urban and rural public schools.

## **TEACH FOR AMERICA**

"People think we are a teacher training organization," said Bond, a Washington High School and Marquette University alum who is its executive director. "We promote leadership development through the profound act of teaching."

In 2009, when Teach for America came to Milwaukee, it had zero alumni school leaders here. Today, there are nearly 60, out of 500 alums in the region.

"We're keeping that talent in Milwaukee, working for Milwaukee's kids," he said.

In summer 2017, Greater Milwaukee Foundation funding allowed TFA to host its first Milwaukee Regional Institute to prepare incoming corps members for the 2017-18 school year.

TFA is just one of hundreds of nonprofits having a major impact on Milwaukee and the region thanks to the generosity of area individuals and foundations.

"Important, vital needs are met by philanthropy here," said Herb Kohl, former U.S. senator and founder of Herb Kohl Philanthropies. "Philanthropy is the core of our community."

Added Daniel Bader, president and CEO of Bader Philanthropies, "One thing that has always impressed me is how generous the community is. We care about our neighbors and our community, and it really shows."

Philanthropy has an obvious economic impact. But there are other significant impacts as well. One is building community.

"Philanthropy allows people to collaborate in pursuit of a shared goal," said Erin Frederick, senior program officer at the Zilber Family Foundation and secretary of the Wisconsin Philanthropy Network. "It gives people an outlet for the universal yearning to make a difference."

## **MUSEUM OF WISCONSIN ART**

Nowhere has community building been more evident than in West Bend, where the Museum of Wisconsin Art opened in 2013.

"MOWA has been an economic and cultural catalyst for the community," said Laurie Winters, its executive director and CEO. She noted there has been a complete renovation of the Milwaukee riverfront in downtown, and that the museum has become a community anchor.

"The museum doesn't take credit for everything, but we feel we were a shot in the arm at just the right moment," she said.



Teach for America-Milwaukee has received \$561,000 in Foundation grants to help fuel its growth in Milwaukee.



## SHAW SCIENTIST

Philanthropy can also be a stimulus for innovation, as demonstrated by the Foundation's Shaw Scientist program, which has supported early-career investigators in biochemistry, biological sciences and cancer research. These researchers are typically at a disadvantage in getting grants because they have not yet built up the scientific evidence to demonstrate the viability of their research. Since 1982, the program has provided \$14 million in grants to support 73 scientists.

"Shaw dollars don't come with the same restrictions that many research grants carry," said Ellen Gilligan, Foundation president & CEO, "so the recipients can explore unconventional approaches and novel ideas."

Adds John Lipscomb, professor of biochemistry at the University of Minnesota and longtime Shaw Scientist selection panel member, "There is a big multiplying factor. For every \$200,000 award, the researcher is typically able to get a \$1 million federal grant."

"Philanthropy has a bigger impact than any of us realize," Bader said. "Most people interact with nonprofits all the time – schools, health care, arts organizations – and don't even think about it."

Bond agreed.

"The next mayor of Milwaukee, the next chancellor of the University of Wisconsin-Milwaukee, the next president of Harley-Davidson, the next CEO of the Greater Milwaukee Foundation is likely in a TFA classroom right now," he said. "We are trying to give a return on investment that pays dividends many years down the line."

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# "Philanthropy is the core of our community"

Herb Kohl, former U.S. senator and founder of Herb Kohl Philanthropies

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The Foundation and its donors have invested \$3.1 million in programming and capital improvements for the Museum of Wisconsin Art. Photo courtesy of Museum of Wisconsin Art.



Rachel, Abby and Miles Monday get a glimpse at a fish hatchery while on a visit this fall to the Hunger Task Force's farm in Franklin. It is one of the nonprofits the children have supported as advisers to the Winnie Fund.

# Next gen PHILANTHROPY

In 2013, when Bob Monday started his donor advised fund, the Winnie Fund, his intention was simple: that each generation learns to take nothing for granted and give thanks for the blessings they have.

"We wanted our grandchildren to know how blessed we are," said Monday, a retired Brookfield business owner. "We also hope that the Winnie Fund, named for my mother-in law, Winifred Schedler, supports the development of empathy in our grandchildren."

Monday's nine grandchildren serve as the fund's advisers, becoming eligible once they reach age 10. Before a fund meeting, typically held every two months, the grandchildren research causes they think are important enough to bring to the table.

"It's not an easy process, because we are all so passionate about our causes," said Emily Monday, 19, a student at the University of Minnesota.

Grandpa Bob also has taken the grandchildren on site visits to

different area nonprofits. "Every time we visit a place like the Hunger Task Force farm, it makes you grateful," said Miles Monday, 15, a student at Marquette High School.

Adds Nathan Monday, 14, a student at Pewaukee High School, "The fund has opened my eyes to the fact that the world is not perfect. And we can help with that." Recent recipients have ranged from Blessings in a Backpack to the Wildlife in Need Center to Sojourner Family Peace Center. Instead of giving gifts at Christmas, Bob and his



wife, Chrissie, give experiences and use their resources to help others.

"We have quite a few donors who have made it a priority to include their children and grandchildren at a young age as part of their philanthropy," said Marybeth Budisch, director of donor services, who works with the Mondays and other donors on arranging nonprofit site visits, holding annual meetings, sharing potential funding opportunities and fulfilling grant requests. "It not only creates a new tradition that they can embrace, but also provides new opportunities to grow closer as a family."

While Bill and Jackie Spaciell of Franklin still give gifts at Christmastime, they too have created a donor advised fund to teach their children about philanthropy.

"We started the fund because we realized we were spending a lot of money on Christmas presents, basically buying too much of the things we didn't really need," said Jackie about the Spaciell Family Fund, which she and Bill started in 2013.

Like the Monday grandchildren, each of the Spaciell children – Zach, 24, Sydney, 18, and Emma, 15 – research a nonprofit and present it for the family's consideration on Christmas Eve, using the Foundation's resources to help make the gifts. Recent recipients have included the African American Children's Theatre, Make-a-Wish Foundation and Children's Hospital of Wisconsin's Reach Out and Read program.

"The biggest impact I have received from this tradition is a deeper understanding of what I care about, which is children," said Zach, a law student at University of Wisconsin-Madison. In his studies, he is focusing on nonprofit law and has joined an advocacy group for children.



Interested in turning giving into a family tradition? Contact Director of Donor Services Marybeth Budisch at 414.336.7068 to discover strategies for how to get started.

## 5 ways to engage the next generation as philanthropists

### 1 TEACH THEM ABOUT THE CONCEPT OF PHILANTHROPY

Invite philanthropic educators to share information about the history of American philanthropy, philanthropy in different cultures and giving philosophies.

### 2 HELP YOUNG ADULTS EXPLORE AND EXPRESS THEIR INDIVIDUAL CHARITABLE INTERESTS

Invite them to write personal philanthropic mission statements to explore and articulate their values, experiences and giving goals, and share your own. Generate lists of activities they are interested in becoming involved in during the upcoming year. Ask them to prioritize, and work with them to take next steps.

### 3 VISIT A RANGE OF PROGRAMS TO LEARN ABOUT ISSUES

Bring young adults to meetings and on visits to organizations that range in scale and approach. Debrief afterward. Invite them to attend philanthropy conferences, regional gatherings, nonprofit events and other educational forums.

### 4 PROVIDE HANDS-ON LEARNING OPPORTUNITIES WHILE BUILDING LEADERSHIP

Make learning opportunities accessible to every age group, and allow flexibility for people to engage when they are ready. Volunteer together in the community and make sure all generations attend.

### 5 INTRODUCE YOUNG ADULTS TO PEERS AND ENCOURAGE MENTORING

Connect with members of the Foundation's Philanthropic Services team to help find opportunities in the community where youth can learn grantmaking skills with their peers. Visit other family foundations, and introduce young people to other young trustees.

*Information from the National Center for Family Philanthropy*

# A REGION BUILT ON GENEROSITY

The metro Milwaukee area has long been known as a generous community. It is the birthplace of the Greater Milwaukee Foundation, Wisconsin's largest community foundation and the nation's second oldest community foundation, and is home to six of the state's largest corporate foundations. For the past two years, the Foundation also has set records in terms of the total amount of grants it has made in the community. Collectively the region continues to set new records in generosity each year by surpassing goals set by the United Performing Arts Fund and United Way of Greater Milwaukee and Waukesha County annual community campaigns.

That type of generosity makes the metro area stand out among other regions in the country.



TOTAL NUMBER OF  
VOLUNTEERS

381,839

33.2% of residents  
volunteer



Ranks **2nd** (behind Minneapolis) for  
the greatest percentage of volunteers

Ranks **3rd** among the 51 largest  
metro areas in terms of volunteering



The science  
behind  
why we give





## VOLUNTEER HOURS



Greatest number of volunteer hours per capita (among 15 other regions)

**47.1**  
MILLION

hours of service

**36.4**

volunteer hours per capita

**\$1.1**  
BILLION

of service contributed



## CHARITABLE GIVING



Greatest number of people donating \$25 or more to charities (among 15 other regions)

**64.7%**

of residents donate \$25 or more to charity



**\$971**  
MILLION

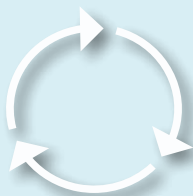
total charitable contributions\*

Information from Vital Signs and Corporation for National & Community Service, Volunteering and Civic Life in America, 2015

\*2012 numbers from 2015 Vital Signs

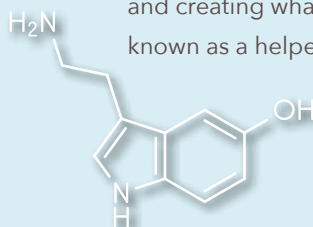
## UNEXPLAINABLE JOY

When we give, whether it's of our time, expertise or financial resources, chances are we feel a sense of elation and unexplainable joy. That feeling inspires us to make that gesture of generosity more than just a one-time occurrence.



## HELPER'S HIGH

A small gesture of generosity prompts release of chemicals such as serotonin, oxytocin and dopamine, making you feel more connected to others and creating what has been known as a helper's high.



## BETTER HEALTH

Giving also leads to other benefits, including lower blood pressure, lower stress levels and greater happiness.

# *Inheritance provides former educators with* **A NEW LESSON PLAN**

If you were to ask New Berlin residents Deb and Peter Johnson six years ago who they thought contributed to the philanthropic fabric of our community, they might have rattled off names like Patrick Cudahy or Herb Kohl.

Now, however, the two retired educators can count themselves

as part of that group. They have Deb's parents, Dorothea and Erhart Brandt, to thank.

Deb's father, who died in 2008, was a savings and loan auditor for the state of Wisconsin. Her mother was a teacher. They both lived quite frugally. By the time Dorothea passed away in 2011 at age 92, she had

amassed an estate worth more than \$1 million.

"When you are given a gift like that, it is a responsibility," said Deb, their only child who inherited the estate. After learning about the Greater Milwaukee Foundation through their trust attorney, the Johnsons decided to create a charitable remainder





trust, with the Foundation as the beneficiary.

"He said the Foundation might be a place that you could work with to fulfill your wishes," Deb said. "It's been perfect."

The Johnsons both came from modest means, and philanthropy wasn't something discussed growing up. Peter grew up on Milwaukee's south side in a low-income housing development near the iconic Leon's Frozen Custard. The son of a mechanic and stay-at-home mom, he was the first in his family to attend college. Higher education was not an expectation of his parents, yet it was one he ended up pursuing. He earned undergraduate and graduate degrees from the University of Wisconsin-Milwaukee and spent a decade teaching before becoming a school principal in Waukesha. Following his retirement, he served as interim principal at several schools in Milwaukee, including Pathfinders Southeastern Education Center and Urban Day School.

Aside from attending college in Kenosha, Deb has spent her entire life in Waukesha County. She grew up in Brookfield before moving to New Berlin. She began her teaching career in a one-room schoolhouse and taught for 33 years in the rural area of the School District of Waukesha before retiring.

Peter said while they likely would have pursued philanthropy on their own, the gift from Deb's mom

pushed them a bit. Their estate will support their passions, which include the Milwaukee Art Museum, Milwaukee Rep and Wisconsin Public Radio.

"What excites me so much is to know that probably forever, gifts will be going to these organizations that we value so much," said Deb, an avid public radio fan and a 35-year Milwaukee Rep ticketholder.

As their relationship with and knowledge of the Foundation has grown, so too has their desire to get more involved. They make it a priority to attend as many events as possible, from annual meetings to GMF Presents, a series that offers donors behind-the-scenes access to area nonprofits. In 2014, they created a donor advised fund they will add to over time.

"We felt like this is the mothership of foundations," Peter said. "It felt good for us to be connected to that."

They now are helping others make that connection. Whenever possible, they bring up the Foundation in conversations or ask friends to join them at events. Forever educators, they teach younger generations about the



Producer Haleema Shah hosting the WPR Next pilot project "Entertain Us" with Chris Malina. WPR Next is a new content incubator at the station, which is celebrating its centennial this year and is one of the organizations the Johnsons have included in their estate plan.

Photo courtesy of WPR/J.Potter

importance of nonprofits and philanthropy.

Brookfield Central senior Gunner Gonzalez is one of their students of philanthropy. He has known the Johnsons for seven years and considers them role models and grandparents. They introduced him to the Foundation this past summer, where he learned about the nonprofit sector more in depth. He considered the experience life-changing.

"They are very passionate, caring, generous people," Gonzalez said. "They are easily two of the most important people in my life."

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**"What excites me so much is to know that probably forever, gifts will be going to these organizations that we value so much"**

Deb Johnson  
Foundation donor

# ‘Every HERO deserves a HOME’

Overlooking Miller Park and immediately south of Interstate 94 lies the Milwaukee Soldiers Home, a community within a community that architecturally and historically has put Milwaukee on the map.

For 150 years, it has offered a place of peace, refuge and healing for area veterans and was part of the foundation for the modern Veterans Affairs.

Yet many in the community are unaware of its significance and that a number of buildings have been rapidly deteriorating.

The Save the Soldiers Home initiative has worked over the last few years to raise visibility and appreciation of the grounds as well as to preserve its cultural heritage. With its latest effort, the initiative also will provide housing for the city's most vulnerable. Over the next two years, six historic buildings will be converted into a total of 101 one- and two-bedroom units for veterans and their families who are homeless or at risk of becoming homeless.

“The history and architecture are important, but providing a home for homeless veterans is a key aspect of our campaign,” said Mick Hatch, a real estate attorney with Foley & Lardner and fundraising campaign

co-chair. “Our vets are heroes, and every hero deserves a home.”

Hatch is a member of the Milwaukee Preservation Alliance, which organized a public advocacy campaign that ultimately led the National Trust for Historic Preservation to add the Soldiers Home in 2011 to its list of America's 11 Most Endangered Historic Places.

President Abraham Lincoln signed legislation, less than a month before his assassination, to create the national system of homes for disabled veterans. A group of Milwaukee women called the West Side Soldiers' Aid Society raised the initial \$110,000 to create a permanent place to provide veterans medical care and housing.

Project organizers are hoping for a similar groundswell of support

At 133,000 square feet, Old Main is the largest structure at Soldiers Home and its showpiece.



for the current campaign. Thirty-six million dollars has been secured through low-income housing tax credits, state and federal historic tax credits, and grants. A remaining \$4.25 million is needed. An anonymous donor will match all gifts and five-year pledges of \$50,000 or more. A fund has been created at the Greater Milwaukee Foundation to receive donations.

"It's always a challenge to raise money, but I think we have such a compelling case statement," said Patti Keating Kahn, Foundation donor and campaign co-chair.

Kahn, who owns two historic downtown Milwaukee buildings and has a keen

passion for historic preservation, felt drawn to the project because of her parents. During World War II, her mom served in the Women's Air Corps and her father was in the Army. She remembers him taking out-of-town guests on tours of the grounds, where buildings date back to as early as 1867.

Milwaukee's Soldiers Home is one of three remaining nationwide and is the most intact. In fact, 20 of the 25 historic buildings are still in use. But with a number of buildings stretching back to the 19th century, preserving them proved cost prohibitive to the VA.

Through an extended use lease with the VA, the Alexander Company will renovate the buildings. That agreement also helps further the VA's goal of ending homelessness among veterans.

"It really makes us proud to partner with the community because we know we can't do it alone," said Gary Kunich, VA hospital spokesman.

It's Alexander Company's first veterans housing project and first national historic landmark, which makes the project more exciting and challenging, said Jon Beck, development project manager.

Restoration will start with the iconic Gothic Revival-style Old Main.

Extensive tuckpointing and brick cleaning are required. A slate



Alexander Company anticipates renovations to Old Main will wrap up by March 2019.

roof and all 569 windows need to be restored. The former domiciliary, which has been vacant since 1989, will be converted into 72 one-bedroom and eight two-bedroom apartments. It also will house a fitness center, resource center and community space. An additional 21 units will be developed across five other buildings. The Housing Authority of the City of Milwaukee will manage the apartments. The Center for Veterans Issues will provide onsite supportive services.

Soldiers Home was on Alexander Company's radar for some time, said Beck, a member of the community advisory council that worked to preserve the buildings.

"All projects have meaning, but when you can work on one like this, with its social mission, really there are just no words for it," Beck said.

Learn more at [savethesoldiershome.com](http://savethesoldiershome.com).

#### INTERESTED IN INVESTING IN THIS PROJECT?

Contact **Marybeth Budisch** at [mbudisch@greatermilwaukeefoundation.org](mailto:mbudisch@greatermilwaukeefoundation.org) or 414.336.7068 to make a gift.



# Education R&D

## Funders collaborative invests in systems change

Riverside University High School principal Michael Harris and his staff pride themselves on creating a culture that sets students up for postsecondary success. More than 75 percent of students applied for and were accepted into college.

Yet only 47 percent complete the Free Application for Federal Student Aid, which helps qualify them for financial aid. That was a disconnect Harris' team was not happy with.

Thanks to financial support from the Milwaukee Succeeds Funders Collaborative, the school

implemented ideas and strategies over the last school year that helped increase its rate to 82 percent.

"This refocused us," Harris said. "We have a really good model we can put in place now."

The collaborative, composed of the Greater Milwaukee Foundation, Bader Philanthropies, Herb Kohl Philanthropies, Northwestern Mutual Foundation and United Way of Greater Milwaukee and Waukesha County, intentionally invests in projects like the FAFSA campaign that expand a best practice or promote innovation. Milwaukee overall, thanks to a concentrated campaign supported by the collaborative, increased its FAFSA completion rate from 51 percent to 59 percent. Once known for pulling down the state's average, Milwaukee is now helping lift it up.

"If we want to change systems, we have to start by changing the way we operate," said Dave Celata, Milwaukee Succeeds' deputy director. "We have to be willing to try new things and work hard to expand what we already know works."

Proposed ideas must be evidence-based, align with Milwaukee Succeeds priority areas such as kindergarten readiness or postsecondary enrollment, and develop from groups involved in the partnership.

Milwaukee Succeeds identified FAFSA completion as a challenge ripe for addressing. The federal government provides more than \$150 billion in financial aid, but that often goes untapped due to lack of information or misunderstanding. A group of Milwaukee partners, including schools, colleges and nonprofits, created a plan to increase the city's completion rate to 60 percent. It received \$62,000 from the collaborative to work closely with 30 pilot schools, providing training for school teams, tips and financial incentives.

Mark Levine, Marquette University's assistant financial aid director who helped work with the pilot schools, praised Riverside for its approach and credited the collaborative's funding with helping make that possible.

"The funding was huge because it allowed schools to use their imagination," said Levine, who has worked in financial aid for nearly 30 years. "They were able to do a lot



Riverside University Principal Michael Harris credits the advice and financial assistance he received from the Milwaukee Succeeds Funders Collaborative for helping create a shift in culture at his school around completing the FAFSA application.



The Milwaukee Succeeds Funders Collaborative supported a communitywide campaign designed to increase FAFSA completion rates by 20 percent, which included a variety of approaches including advertising on local bus shelters.



of different things, and I don't think they would have been as successful without it."

The day FAFSA became available last October, Riverside held an informational event for families. Fifteen financial aid professionals were on hand to help students. Instead of relying solely on the school counselor to help students, a team consisting of Harris, a school counselor, student class president, parent coordinator and College Possible coach worked with seniors throughout the year to keep them motivated and on track.

"It really was the connection of all the dots on something so straightforward that you could easily invest and feel confident it was going to work," said JoAnne Anton, director of giving for Kohl Philanthropies and a collaborative funder.

The collaborative meets quarterly and has supported a range of projects, from helping struggling readers to providing academic support and mentoring for high school

seniors so they can successfully transition to college. The Foundation, which belongs to five collaboratives, sees them as a valuable way to maximize resources and impact, said Kathryn Dunn, vice president of community investment.

Funders new to the concept appreciate the knowledge sharing.

"For us, it is really around alignment and learning together," Anton said. "There is strength in numbers. Together we can impact the whole by coming in as a part."

For example, Anton learned about M-cubed, a partnership between Milwaukee Public Schools, Milwaukee Area Technical College and the University of Wisconsin-Milwaukee, after the collaborative supported two of its projects. Kohl Philanthropies

## BY THE NUMBERS

Started in **2015**

**5** partners

**8** grants awarded

Total of **\$1,317,861**

Range from **\$11,000-\$267,000**

**\$98,000** average grant size

later funded M-cubed to help increase its reach.

The collaborative has never said no to a project. If anything, Celata said, they say "not yet" so the idea can be further developed. While the group has seen its share of successful projects, he anticipates that might not always be the case.

"If you're working on projects that are innovative, sometimes they might not work," Celata said. "But even failing can move us forward as long as we learn something in the process."



**on the table**  
*Your voice matters.*





# SETTING THE TABLE *for the* REGION'S FUTURE

Every sustainable social change began with a conversation.

This fall, the Greater Milwaukee Foundation helped set the table for hundreds of those conversations — and their possible ripple effects — through a new regionwide initiative called On the Table MKE.

On Oct. 17, more than 5,000 individuals from across the metro Milwaukee area gathered at tables large and small for mealtime conversations about how to improve the quality of life — both individually and collectively — throughout the community.

Individuals representing philanthropy, businesses, nonprofits, education and the faith community participated. Topics ranged from youth homelessness to financial literacy to how to change the public perception of black males in Milwaukee. The Pfister Hotel opened its doors to the public that morning, and more than 300 people took advantage of the opportunity to engage with more than 30 local influencers on different topics of discussion. At night, NEWaukee, a social architecture firm, hosted more than 100 individuals in the rotunda of Milwaukee City Hall.

The Foundation will publish a report this winter containing topics and ideas that surfaced from the conversations. Early reports indicate the event was meaningful to participants on a personal level. More than 90 percent of guests who responded to a survey said they met someone new at their table. More than 97 percent said they now feel more motivated to work with others to have an impact in their community.

To learn more about the conversations that took place that day, search #onthetableMKE on Facebook, Twitter and Instagram.



By adding dental services, Lake Area Free Clinic Executive Director Mary Reich and her staff, including new Dental Clinic Manager Carrey Spencer, will be able to meet a major health care need of existing clients.

## New clinic gives Waukesha County residents Something to smile about

A waitress worried about a dramatic drop in her tips when she lost a front tooth. Another patient was overlooked for a position he was obviously qualified for because of his missing teeth. A third individual had given up hope of ever finding employment because, with many teeth missing, her face was sagging.

"Patients tell us about how people make judgments about their education and their work ethic because of their smile," said Mary Reich, executive director of the Lake Area Free Clinic in Oconomowoc. "Not only do those judgments hurt, but having missing teeth limits employment opportunities."

Currently low-income adults in Waukesha County – an estimated 35,000 people, 16,000 of those uninsured – have very limited access to preventive and basic dental care. Reich said there are fewer than six dentists in the county who will accept new adult patients on Medicaid, and some of those have restrictions.



"Either people cannot get in to see a dentist or, if they can, they cannot afford the procedure, so they just have the tooth pulled," said Megan Welsh, LAFC's marketing and development director. The clinic, founded in 2001, is currently staffed by four full-time employees and more than 230 volunteers. Often the only dental care low-income patients receive is in hospitals and urgent care facilities when their dental problems become emergencies.

"It's the most expensive type of care, and there is no continuity, no follow-up," said Reich.

The self-esteem consequences of poor dental hygiene are serious, but not nearly as serious as the health consequences. Poor dental health can lead to or worsen heart disease, diabetes, respiratory problems and sepsis, to name a few.

"Most of the patients we see don't address their dental health unless

something hurts," said Reich. "They are struggling to pay the rent, get food. And they were never taught the importance of proper dental care."

To address this major need, in October 2017, LAFC opened a six-chair dental clinic. It will serve Waukesha County adult residents with Medicaid or no private dental insurance and income at or below 200 percent of the federal poverty level, or \$49,200 for a family of four. Clinic services include exams, routine cleanings, fillings, extractions, treatment of abscesses, non-surgical periodontal therapy and oral hygiene education. Down the line, patients with specialized needs will be referred to a network of volunteer dentists in the community.

The decision to begin providing dental services came after an LAFC taskforce studied the issue for over a year and the LAFC

board unanimously voted to proceed.

Longtime LAFC supporters – Craig and Mary Schiefelbein – co-chaired the dental capital campaign, along with Gert Wilkinson. They kicked it off with a \$100,000 grant through their fund at the Oconomowoc Area Foundation.

"This will have a huge impact on the quality of life for so many people, people who wouldn't have access to this care otherwise," Craig Schiefelbein said.

The OAF, a partner foundation of the Greater Milwaukee Foundation, has contributed more than \$651,000 to the clinic over the years, enabling it to provide a medical home for 200-plus patients per month. Now those patients will have a much-needed dental home as well.

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**"This will have a huge impact on the quality of life for so many people, people who wouldn't have access to this care otherwise"**

Craig Schiefelbein  
Foundation donor

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Oconomowoc Area Foundation donors Mary and Craig Schiefelbein co-chaired the campaign for a new dental clinic.





# Giving IRA dollars to charity makes good sense

by **SARAHEHRHARDT**

*Partner, Michael Best & Friedrich LLP*

On Dec. 18, 2015, President Barack Obama signed legislation that indefinitely extended the charitable IRA rollover, also referred to as the IRA qualified charitable distribution. The charitable IRA rollover allows certain individuals to exclude from their taxable income certain transfers of individual retirement account (IRA) assets that are made directly to public charities. What does that mean in practical terms and how does it work? Let's walk through some common questions.

## **Who can use a charitable IRA rollover?**

Individuals who are at least 70½ years old (which is also the date you must start taking required minimum distributions [RMDs]).

## **How much can I transfer?**

A maximum of \$100,000 per year.

## **Where can the charitable rollover amount come from?**

An individual IRA.

## **Can this transfer be used to satisfy my required minimum distribution?**

Yes, if you have not already taken your RMD in any given year, a qualifying rollover gift can count toward satisfying this requirement.

## **Can I make a transfer to any charity I choose?**

Not currently, as there are some limitations. Donor advised funds, supporting organizations and private foundations are excluded from the charitable IRA rollover provision. However, there has been some indication from Congress that the current rule prohibiting the rollover option to donor advised funds may be changed, potentially within the next few months.

The Greater Milwaukee Foundation also has a number of funds (see sidebar) already established that qualify to receive rollovers from IRAs. In addition, you can create your own designated or field-of-interest fund that can accept rollovers from IRAs.

## **Why should I consider doing a direct charitable rollover?**

There are several advantages to doing a direct charitable IRA rollover versus taking the required minimum distribution from the IRA directly into your personal account, and then making a contribution to charity. If you do not itemize, it will reduce your reportable income, but there will be no change in your deductions – a net win for you. If you are an itemizer, it will reduce your income but will also reduce

your deductions, which sounds like a wash. But by avoiding higher income, you may avoid certain phase-outs of other federal tax benefits or reduce your tax on Social Security benefits or the 3.8 percent surtax. At worst, it will be income-tax neutral, at best, a reduction in income tax.

Of course, you should be checking with your tax adviser to confirm the details of your particular situation.

## **How do I make a qualified charitable distribution?**

You should contact the IRA custodian and request that the distribution be made directly to the charity.

### **Foundation funds that accept IRA distributions**

Basic Needs Fund  
Camps for Kids Fund  
Mayor's Earn & Learn Fund  
Milwaukee Succeeds Fund  
Reasons for Hope MKE Fund  
Community Engagement Fund  
Violence Prevention Fund



Still wondering if a charitable IRA rollover gift makes sense for you? Contact Mary Kay Mark, director of gift planning, at [mkmark@greatermilwaukeefoundation.org](mailto:mkmark@greatermilwaukeefoundation.org) or 414.336.7066 to discuss your specifics.



# Philanthropy paves way for RESTORED POINT OF CIVIC PRIDE

Growing up on Milwaukee's south side, Claude Krawczyk remembered the looming statue of Tadeusz Kościuszko in Kościuszko Park for what a small kid might – a recognizable gathering spot among friends.

As an adult who chaired the fundraising committee in charge of its restoration, he now sees it for much more than that – a source of neighborhood pride.

The monument, named after the Polish native who fought in America's Revolutionary War, was donated in 1905 by the Polish National Alliance. For more than a century, the elements have taken


their toll on the seven-ton bronze sculpture. While not in immediate danger of falling over, it had cracked in parts, was disfigured due to corrosion and dirt, and had oxidized, leaving it with an uneven green patina.

An all-volunteer, 18-member group began fundraising in 2008 to ensure that the monument would endure for future generations. After a five-year effort, which coincided with the beginning of the Great Recession, more than \$400,000 was raised from individuals, the city of Milwaukee and Milwaukee County. That generosity paved the

way not only for a newly restored monument but also a new plaza, complete with a brick pathway, landscaping and distinctive harp lighting. The sculpture was rededicated on Veterans Day 2013 following nine months of restoration work.

A \$100,000 endowment fund created in spring 2017 will ensure that future kids see it as a gathering spot and grow up to recognize its cultural significance as well.

Learn more about the Polish patriot via the Milwaukee PBS documentary at [bit.ly/Kosciuszkosculpture](http://bit.ly/Kosciuszkosculpture)



The Kościuszko Monument is a south side icon that was restored and rededicated in 2013.

# Paying it forward

## Schloemer Family Fund

A strong sense of philanthropy and community involvement is ingrained into the fabric of West Bend. Jim Schloemer should know – he is both a byproduct of and a contributor to such a culture.

The West Bend native was among hundreds of individuals over the past 65-plus years who received a scholarship from the Ziegler Family Foundation, created by the founders of the West Bend Company. When Cliff Nelson, co-founder of the West Bend Community Foundation, passed away in 2001,

Schloemer assumed his board seat and helped guide its early growth.

Co-founder and CEO of Menomonee Falls-based Continental Properties, a national real estate development company, Schloemer remains steadfastly committed to his hometown through philanthropy. He advises four foundation funds – a scholarship fund created in his mother's memory and another scholarship fund created by his centenarian stepfather, a fund that supports maintenance of a bridge connected to the Museum of Wisconsin Art and a donor advised family fund.

### What does philanthropy mean to you?

It means contributing to the community – whether that is a neighborhood or the global community – in a way that you can improve it emotionally, educationally and culturally.

### Why did you choose the West Bend Community Foundation?

It was because of my familiarity with how well the foundation serves as a steward and administers the business of philanthropy. Scholarships are particularly near and dear to me because of

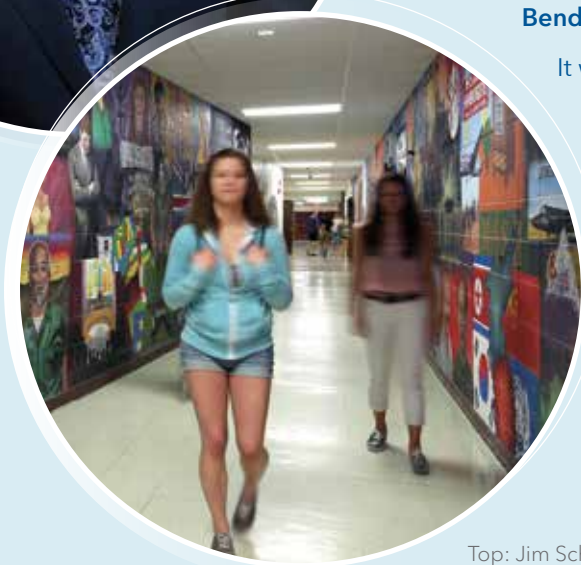
my own experience as a Ziegler Scholar. I've always felt very appreciative of that scholarship and what it meant for my family when I went to college. It is all about the idea of giving back to the community in West Bend.

### What do you enjoy most about having a fund at the West Bend Community Foundation?

It's the way the foundation manages both the financial and charitable sides of philanthropy. It also serves as a great way of introducing us to worthy organizations or areas in which we're particularly interested. It is both a great resource and filter. The foundation also creates ease of operation. You don't have to worry about the business of running a charitable foundation. The foundation takes care of that. You can just focus on the fun part.

### What kind of impact do you hope to make with your fund?

My wife, Andrea, and I want to feel that we had some opportunity to be an influence for good. Our three priorities are child welfare and education, the arts and community development. Our three children are successor advisers, and our hope is that we'll give them exposure to continue to pay it forward.



Top: Jim Schloemer, co-founder and CEO of Continental Properties  
Bottom: The Louise Schloemer Roth Scholarship Fund, which Schloemer created in memory of his mother, supports students attending West Bend's two high schools.



# A GIFT GIVEN, A WISH EXPRESSED, A LEGACY MADE

## Patrick Cudahy Fund

Not many things nowadays are built to last – except maybe a fund at a community foundation. If he were still living, Patrick Cudahy certainly could attest to that.

The Irish immigrant and Milwaukee industrialist, who literally put the city of Cudahy on the map back in 1892, built a charitable legacy that is still going strong more than 100 years later.

On Nov. 16, 1915, in a letter addressed to Oliver C. Fuller at the Wisconsin Trust Company, Cudahy gave a gift of \$25,000 to support efforts in launching the country's second community foundation, the Milwaukee Foundation. Cudahy specified four local agencies – Associated Charities, Little Sisters of the Poor, St. Rose's Catholic Orphan Asylum and St. Vincent's Catholic

Infant Asylum – as agencies to receive annual income generated by the fund.

Surprisingly, with his generosity came an apology: "I wish to apologize for expressing a wish as to what disposition is to be made of the proceeds, as I believe that charity should be as broad as the ocean, yet I am familiar with the workings of those four institutions, and know them to be well and economically managed. I also know them to be deserving, and I think they are somewhat neglected by the general public."

In 1917, Cudahy gave an additional \$50,000, specifying that it provide additional support for St. Vincent's. He also requested that the Foundation redirect support previously designated from Associated Charities to

the Milwaukee Children's Free Hospital (now Children's Hospital of Wisconsin). He "preferred not to make any splash about the gift," but intended the largesse to "awaken some interest in the Foundation."

Cudahy didn't live long to see his gift's impact. He died two years later at age 70. For the next 17 years, his contributions were the Foundation's principal assets. Since its inception, the fund has paid \$425,722 in grants.

His designated agencies have experienced changes, as one might expect over a century.

But the Foundation has continued to honor his original charitable intent while making sure his fund has enduring community impact, thanks to his family and oversight from the Foundation's Board.

Children's Hospital of Wisconsin is one of several area nonprofits that have received longstanding support from the Patrick Cudahy Fund. Photo courtesy of Children's Hospital of Wisconsin.



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## City seeks *change* to end chronic homelessness

Providing change to area homeless may provide short-term aid, but the City of Milwaukee and Milwaukee County want to invest in long-term solutions toward addressing the issue.

They are seeking the public's help through Key to Change, a project designed to raise money and awareness around the issue of chronic homelessness by installing key-shaped coin collection meters throughout downtown Milwaukee.

"You put your money in the meter, and you are going to make a profound difference in the lives of people within our community," said Milwaukee County Executive Chris Abele at the initiative's September launch, noting that the county has experienced a 40 percent drop in chronic homelessness since 2009.

Donations will be added to a Greater Milwaukee Foundation fund that supports the county's Housing First program, which provides housing to homeless without barriers or preconditions. Since 2015, more than 225 individuals have been placed into housing, with a 98 percent retention rate.

Give online via [keytochangemke.com](http://keytochangemke.com) or call Philanthropic Adviser Mark Maurice at 414.336.7067 to make a gift to the Housing First Endowment Fund.

