Enhancing the present and ensuring the future of our community by understanding What Kenosha Needs

Report to the Community 2017
A Message from the President of the Board and the Executive Director

In our Annual Report, we want to share with you highlights of calendar year 2017, detailing our recent grant and scholarship distributions and highlighting our overall financial performance.

In addition to donations received and the creation of new endowment funds (including the Grace Kolakowski Fund for a Kenosha Performing Arts Center), the Foundation achieved asset growth through a successful investment strategy. So while our total distributions (through grants, sponsorships and student scholarships) more than doubled over 2016, through our investment strategy, overseen by the Foundation Board’s Finance Committee, we achieved 13.7 percent investment growth in 2017.

A key highlight for the Foundation in 2017 was the completion of a Community Needs Assessment Survey (see following page). Conducted in collaboration with the Kenosha County UW-Extension, through the on-line survey we gained insight into Kenosha’s social and human service needs; the results have helped to guide the Foundation’s grant making focus in 2018.

We are committed to being “Kenosha’s resource for charitable giving” - the focus since the Foundation was established in 1926. Consider joining us in our philanthropic efforts to support the people and the causes in Kenosha County.

Thank you for your interest,

Kenneth Fellman
President, Board of Directors

Robert Schneider
Executive Director

Our Family of Donors and Funds

Named Endowment Funds
Income from these endowment funds may be distributed to non-profit organizations on the advisement of the donor and at the discretion of Foundation’s Board of Directors:

Howard Brown Endowment for the Benefit of the Kenosha Community Foundation
Advantage Bank Officers and Directors Fund
Mary Frost Ashley Endowment
Elynor Family Endowment
Jessica R. Hofp Endowment
Ralph and Frances A. Jerschke Fund
A. Allan and Isabel M. Jankus Fund
Kenosha News Fund
Orvis Family Endowment
Kathleen Steumke Legacy Fund
Charles Vignieri Fund
Charles and Kathryn Heide Endowment Funds

Field of Interest Funds
The Foundation manages several Field of Interest funds. With these funds, donors instruct the Foundation to distribute all proceeds to non-profit organizations within a general area of interest; the Foundation then selects grantees via a competitive grant making process:

The Women’s Fund
OMC Legacy Fund
The LaFave Family Fund
The Kubasewicz Family Trust
The Kenosha Arts Fund

Scholarship Funds
The Kenosha Community Foundation manages the endowment funds that award scholarships to deserving area students:

Mary Bradford High School Class of 1961 Scholarship Fund
Irene Buri-Nelson Scholarship at St. James Church
The Foundation’s Crayopley Scholarship
Herman and Virginia Gundlach Scholarships
The Henry A. Link Scholarship Fund
The Mary Louise Link Scholarship Fund
A. Allan and Isabel M. Jankus Scholarship Fund
The Mary Lou and Arthur F. Mahone Fund
Manny Mitka Fund

For more information about the Foundation’s family of funds, including how to start one of your own, visit kenoshafoundation.org.

Donor Advised Funds
The Kenosha Community Foundation manages the numerous funds established by Kenosha area residents, wherein each fund’s donor -- individuals and/or businesses - advises the Foundation on the grantee selection criteria and recommends specific annual award recommendations:

Balmes Family Fund
Bel-Ami Chemerow Fund
Marion Gratz Fund
Robert Loss Fund
BMO Harris (formerly M & I) Corporate Fund
Gene F. Soens Fund
Elden and Ruth Weiss Fund
Weir Family Fund

Organizational Endowment Funds
The Kenosha Community Foundation manages the following endowments which were established by a donor or group of donors to benefit Kenosha area nonprofit and charitable organizations:

The Verne and Doris Gantzler Funds
Brookside Care Center Endowment
Green Ridge Cemetery
Habitat for Humanity—Kenosha
Hospice Alliance Foundation
Lemper Center, Inc.
Kemper Center Foundation
Kenosha Area Family and Aging Services, Inc.
Kenosha Community Youth as Resources
Kenosha Public Museums
Kenosha School of Technology Enhanced Curriculum (KTEC)
Kenosha Symphony Orchestra Endowment Fund
Kenosha Visiting Nurse Association, Inc.
Library Square School
Open Wings Learning Center
Women and Children’s Horizon

Fiscal Sponsorships
With a fiscal sponsorship, the Foundation – a 501(c)(3) non-profit organization or charity – has an arrangement to allow another group or project (without non-profit status) to use the Foundation’s tax exempt status to accept tax-deductible contributions from donors:

Snap-on Associate and Franchise Disaster Relief Fund
Development Professionals of SE Wisconsin
Kenosha Festival of Cartooning
Kenosha Potato Project
Uptown Brass Village Association
Conducted Community Needs Assessment Survey

The Foundation, in partnership with Kenosha County UW-Extension, conducted an online community needs assessment survey from November 1 through 19, 2017—we recorded over 200 responses. In addition to sharing survey results with local stakeholders, they will help us to direct future grant making from our Unrestricted Funds. The results of the survey, titled #WhatKenoshaNeeds, are summarized below.

What are the most significant issues/challenges facing the county?

<table>
<thead>
<tr>
<th>Issue</th>
<th>2017</th>
<th>2016</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Substance Abuse</td>
<td>41%</td>
<td>35%</td>
<td></td>
</tr>
<tr>
<td>Mental Health</td>
<td>35%</td>
<td>28%</td>
<td></td>
</tr>
<tr>
<td>Crime</td>
<td>28%</td>
<td>18%</td>
<td></td>
</tr>
<tr>
<td>Homelessness/Affordable Housing</td>
<td>26%</td>
<td>16%</td>
<td></td>
</tr>
<tr>
<td>Poverty</td>
<td>18%</td>
<td>16%</td>
<td></td>
</tr>
<tr>
<td>School Issues</td>
<td>18%</td>
<td>16%</td>
<td></td>
</tr>
</tbody>
</table>

To what issues/organizations should the Foundation focus its support?

In order of priority, as specified by survey respondents:

1. Substance Abuse
2. Mental Health
3. Homelessness/Affordable Housing
4. Youth Programs
5. Arts

What things do you like most about living in Kenosha County?

<table>
<thead>
<tr>
<th>Issue</th>
<th>2017</th>
<th>2016</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arts and Culture</td>
<td>37%</td>
<td>35%</td>
<td></td>
</tr>
<tr>
<td>Uniqueness of the Urban/Rural mix</td>
<td>35%</td>
<td>27%</td>
<td></td>
</tr>
<tr>
<td>Family</td>
<td>27%</td>
<td>25%</td>
<td></td>
</tr>
<tr>
<td>Jobs and the Economic Climate</td>
<td>25%</td>
<td>22%</td>
<td></td>
</tr>
<tr>
<td>Convenience</td>
<td>22%</td>
<td>20%</td>
<td></td>
</tr>
<tr>
<td>Recreation / Sports Opportunities</td>
<td>20%</td>
<td>18%</td>
<td></td>
</tr>
</tbody>
</table>

What one thing would make Kenosha County a better place to live?

In order of priority, as specified by survey respondents:

1. Improve Local Transportation and Infrastructure
2. Poverty Reduction
3. Increase Community Communications / Collaborations
4. Address Crime / Police / Justice Sector Reforms
5. Arts and Recreation

Established the Grace Kolakowski Fund for a Kenosha Performing Arts Center

Realizing a need in Kenosha for culture and entertainment, long-time Kenosha resident Grace Kolakowski established the fund to “get people talking about and planning a new performing arts center to broaden, enlighten and enrich the spirit of the community.”

Installed new works in Sculpture Walk-HarborPark

In September, the Foundation’s Kenosha Arts Fund Committee installed the 2017-2019 exhibition of Sculpture Walk—HarborPark; 12 new works by Midwestern artists at sites along Kenosha’s harbor and downtown, including, for the first time, in Civic Center Park.

Initiated Fiscal Sponsorships of Two New Area Groups

While the Foundation saw the successful transition of the Kenosha Creative Space to an independent non-profit organization, in 2017, we initiated fiscal sponsorship of two groups serving the Kenosha area: the Uptown Brass Village Association and the Kenosha Potato Project.

**Financial Statements**

**Statements of Financial Position as of December 31, 2016 and 2017.**

<table>
<thead>
<tr>
<th>ASSETS</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Current Assets</td>
<td>$10,458,014</td>
<td>$11,213,928</td>
</tr>
<tr>
<td>Property and Equipment</td>
<td>$10,641</td>
<td>$4,629</td>
</tr>
<tr>
<td>TOTAL ASSETS</td>
<td>$10,468,655</td>
<td>$11,218,557</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>LIABILITIES AND NET ASSETS</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Liabilities (includes funds held for other organizations)</td>
<td>$1,524,056</td>
<td>$1,642,348</td>
</tr>
<tr>
<td>Net Assets (unrestricted, temporarily and permanently restricted)</td>
<td>$8,944,599</td>
<td>$9,576,209</td>
</tr>
<tr>
<td>TOTAL LIABILITIES AND NET ASSETS</td>
<td>$10,468,655</td>
<td>$11,218,557</td>
</tr>
</tbody>
</table>

**Foundation Highlights in 2017**

Auditors—Tirabassi, Felland & Clark, LLC
Auditors Note: This is a summarized financial statement. Complete audited financial statements and copies of the Foundation’s Form 990 are available; contact email at info@kenoshafoundation.org.

NOTE: The Kenosha Community Foundation operates in compliance with the National Standards for Community Foundations as set forth by the Council of Foundations.
Organizations and programs that we supported in this sector include:

- Anderson Arts Center
- Center for Collaborative Research
- Fine Arts at First
- Kenosha Chamber Choir
- Kenosha Creative Space, Inc.
- Kenosha Public Museums
- Kenosha Symphony Orchestra
- Lakeside Players
- Lemon Street Gallery and ArtSpace
- Southport Quilters Guild

In 2017, the Foundation supported several programs offered by the Kenosha Achievement Center (KAC), including:
- Sprouts play group program,
- depression discussion groups, and
- the Summer Employment Exploration program that provided special needs students, ages 16-21, with paid work opportunities.

In December 2017, KCS purchased a downtown building on 57th Street; in addition to gallery/performance space, it is home to the Kenosha Symphony Orchestra, Kenosha Art Association and Center for Collaborative Research.

After three years of Foundation fiscal sponsorship, the Kenosha Creative Space, Inc. (KCS) received 501(c)3 non-profit status.

With its innovative programming, the Kenosha Literacy Council (KLC) is a long-time Foundation grantee partner.

In 2017, the Foundation distributed $756,607 in grants and sponsorships to not-for-profit organizations that serve Kenosha County and in scholarships to area students.

2017 Distributions by Sector

- Community Support and Development
- Health and Social Services
- Arts and Culture
- Education and Programs for Youth
- Scholarships

In 2017, 48 Kenosha County students received over $70,000 in scholarship funds from Foundation endowments.

Over the past five years, to benefit community nutritional, physical and mental health, the Foundation helped establish several community garden programs throughout Kenosha County.

In 2017, we supported the St. Matthew’s ElderGarden for ages 55 and over and, through a grant to the Kenosha County UW-Extension, the Wilson School Community Garden.

With its innovative programming, the Kenosha Literacy Council (KLC) is a long-time Foundation grantee partner.

In 2017, we supported a number of KLC programs: Women in Focus workshops, Family Literacy Nights, Creating Literacy Leaders, and an English Learner program held during the school year - a collaboration with the Boys and Girls Club of Kenosha.

In 2017, 48 Kenosha County students received over $70,000 in scholarship funds from Foundation endowments.

Community Support and Development

Organizations and programs that we supported in this sector include:

- Downtown Kenosha, Inc.
- Green Ridge Cemetery
- Hawthorn Hollow Nature Sanctuary (Hyslop Foundation)
- Kemper Center, Inc.
- Kenosha Commission on the Arts
- Kenosha Common Markets
- Kenosha County UW-Extension
- St. Matthew’s ElderGarden
- United Way of Kenosha County

Education and Programs for Youth

Organizations and programs that we supported in this sector include:

- Big Brothers and Big Sisters
- Boys and Girls Club of Kenosha
- ELCA Urban Outreach Center
- Kenosha Literacy Council
- Kenosha Music Teachers Association
- Kenosha YMCA
- Library Square School
- Open Wings Learning Community
- St. Joseph’s Catholic Academy
- UW Parkside Foundation