



LA CROSSE
COMMUNITY
FOUNDATION

For the Good of La Crosse County. Forever.

ANNUAL IMPACT REPORT 2019

PROTECTING OUR COMMUNITY'S GREATEST ASSETS

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Dick Record
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Barbara Stewart
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Program Director

Jamie Schloegel, CFRE
Executive Director

Sherry Beames
*Executive Assistant/
Office Manager*

This annual report is published by La Crosse Community Foundation for friends and supporters of our mission.

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PROTECTING OUR COMMUNITY'S GREATEST ASSETS

A letter from Executive Director
Jamie Schloegel, CFRE

Dear Friends,

Think about what you love most about the greater La Crosse area. I imagine some love our beautiful landscape and plethora of outdoor recreation opportunities. Some love our lively arts community. Others maybe their places of worship, first-class health care or our incredible schools.

Whatever it is, all of these things that we love most, including our friends and neighbors, make up our community's greatest assets. And at La Crosse Community Foundation, we've been dedicated to protecting and enhancing these assets for all who call the La Crosse area home for the past 90 years.

We do this by connecting people, passion and giving. The foundation provides a platform for anybody interested in giving back today or after their passing the ability to do so through charitable gifts of any size.

The progress we made in 2019 highlighted in this report is the result of the work we've done as a community for the community to continue protecting the assets we love. Thank you for helping us make La Crosse County a vibrant, generous and inclusive community where we can all build new memories, together.

With gratitude,



What is it that you love about the greater La Crosse area?

Whether it is close family ties, the beautiful natural landscape or the sense of community, this region means a great deal to many of us. Yet there is still much work to be done to ensure that health, safety and opportunity are available to all. We invite you to consider your love of this place you call home and how we can come together to ensure all residents experience a thriving community.



The Community's FOUNDATION



La Crosse Community Foundation is a grantmaking public charity dedicated to improving the lives of people in the La Crosse area

La Crosse Community Foundation was created in 1930, making us one of the oldest in the nation. We are building a permanent source of community capital to benefit the greater La Crosse area. Most funds are endowed, which means they will continue to grow and provide resources to community nonprofits forever.

La Crosse Community Foundation is proud to serve as your ally in doing great work for our community. We work as a liaison between donors and our local nonprofit organizations to ensure La Crosse County is a healthy, safe, vibrant place to live for all.

ENDOWING FOR A SUSTAINABLE FUTURE

What is an Endowment Fund?

It's a fund where the original gift...



is invested to grow over time...



with only the set distribution allowance spent from the fund annually...



so the fund will exist to support the causes donors love, forever.

Year one



A fund is established with a **\$25,000** gift.

Initial gift grows & pays out a board-approved spending allowance each year.

15 years later...



The fund made **\$20,169** in cumulative grant distributions, and has a **\$32,431** endowed fund balance.

Original balance & grants distributed is growing. The gift has more than **doubled**.

30 years* later...



The fund made **\$46,333** in cumulative grant distributions, and has a **\$42,070** endowed fund balance.

Original balance & grants distributed continue to grow. The gift is more than **3 times** the size of the original gift.

*Based on estimated annual growth rate of 7.5% and 4.75% spending allowance for grants.

DONOR OPPORTUNITIES

La Crosse Community Foundation has a variety of giving options. Any person, family, business, or qualified charity can start a fund that LCF will manage in perpetuity.

COMMUNITY GIVING FUND AND NAMED UNRESTRICTED FUNDS

The Community Giving Fund and named unrestricted funds support our competitive grantmaking program. We host four annual grant contests, giving local charitable organizations the opportunity to submit a proposal for funding support. Grants are awarded in a variety of focus areas.

DONOR ADVISED FUNDS

Donor advised funds allow donors the freedom to recommend grants to any charitable organization anywhere in the world. Most donor advised funds are endowed, yet we also offer the flexibility to spend them down. Donor advised fund holders can seek grantmaking advice from LCF staff with expertise in current community needs.

DONOR DESIGNATED AND AGENCY FUNDS

Designated funds allow donors to identify one or more charitable organizations or programs to receive annual support from the fund. Designated funds can be established by individuals, businesses, or charitable organizations (agency funds).

FIELD OF INTEREST FUNDS

Field of interest funds allow donors to identify and support a particular field of interest through the fund's annual distribution without designating a specific charitable organization or program. Field of interest fund grants are awarded through our competitive grantmaking program.

SCHOLARSHIP FUNDS

Scholarship funds allow donors the opportunity to invest in our future leaders by helping to lessen the financial barrier to higher education.

GIVING THAT WORKS FOR YOU

LCF offers a flexible, simple process for helping you achieve your charitable goals. Funds can be permanent or short-term. You can give by establishing a fund or simply making a gift to your favorite field of interest fund, nonprofit agency fund, or the Community Giving Fund.

YOU GIVE

LCF offers many ways to give:

- ✓ Cash
- ✓ Stock and mutual funds
- ✓ Life insurance proceeds
- ✓ Real estate
- ✓ Retirement plan assets
- ✓ Charitable gift annuities
- ✓ Bequests in a will or trust

WE INVEST

LCF invests your gift to:

- ✓ Ensure each fund provides an annual distribution
- ✓ Maintain the fund's "buying power" over time
- ✓ Provide strong returns in relation to our investment benchmarks

YOU CHOOSE

You choose how involved you want to be in grant decisions:

- ✓ Donor advised funds allow you to recommend grants to any qualified charitable organization anywhere in the world.
- ✓ Field of interest funds allow you to choose an area of interest, and LCF directs the giving.
- ✓ Unrestricted funds allow LCF to direct grants to the areas of greatest need.

Help strengthen your La Crosse County community forever.

GRANT YEAR IN REVIEW 2019

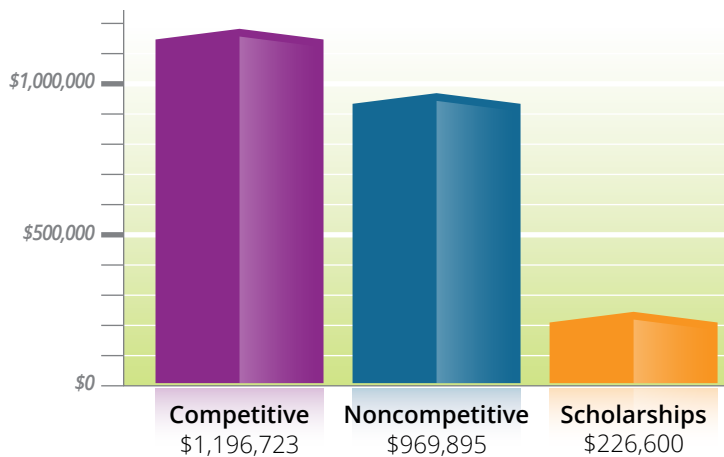
\$2,393,218 AWARDED IN GRANTS IN 2019!

Thanks to our generous donors, over **700 grant awards** were made benefiting nearly **200 charitable organizations** in 2019!

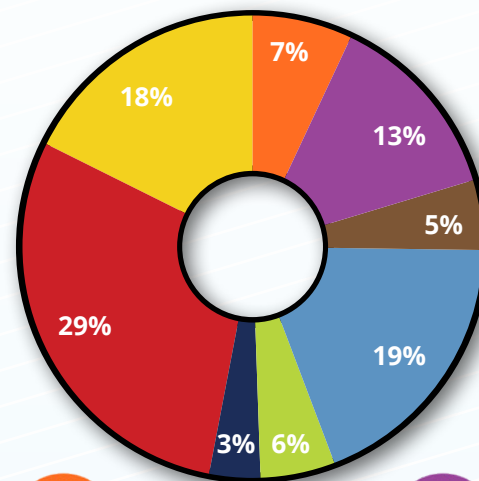
La Crosse Community Foundation has three types of grants:

- 1) **Competitive** grants from unrestricted and field of interest funds
- 2) **Noncompetitive** grants from donor advised, designated, and pass-through funds
- 3) **Scholarships**

Here's how 2019 grants break down:



2019 GRANT FUNDING BY PROGRAM AREA



Arts & Humanities
7% | \$172,932



Community Improvement
13% | \$317,398



Culture & Diversity
5% | \$117,769



Education & Scholarships
19% | \$450,043



Environment
6% | \$130,024



Faith
3% | \$80,635



Health & Human Services
29% | \$700,243



Recreation & Wellness
18% | \$424,175

FEATURED GRANT STORIES

We are pleased to share the following stories that highlight the community impact being made across all eight program areas by our 2019 grantees.



ARTS & HUMANITIES
Curating history and creativity



La Crosse Community Theatre **The Penguin Project**

Funded by: Robert and Eleanor Franke Charitable Fund

La Crosse Community Theatre received a \$15,350 grant to present its first-ever The Penguin Project production of Annie Jr. The Penguin Project is a national theatre program that gives youth with developmental disabilities the opportunity to perform in a Broadway musical.



La Crosse Public Education Foundation

Portable Wireless Microphone System

Funded by: Community Giving Fund

Teachers in the School District of La Crosse theater arts program needed a better sound system to help reinvigorate the district's theater program. A \$34,657 grant was awarded to purchase a portable wireless microphone system that schools across the district will share.

Students at SOTA II learned how to use the equipment first, then created instructional videos for students and teachers to learn how to operate the equipment. Logan High School used the equipment first with their recent production of "High School Musical."





CULTURE & DIVERSITY

Celebrating our differences



Unitarian Universalist Fellowship of La Crosse Creating a Healthier Multicultural Community

Funded by: Robert and Eleanor Franke Charitable Fund

The Unitarian Universalist Fellowship of La Crosse received a \$35,845 grant to support their “Creating a Healthier Multicultural Community” project. Community members and leaders came together for lectures and facilitated dialogues about racism with guidance from Nurturing Diversity Partners of Milwaukee. A team of local community members was trained to facilitate “Deep Dive Dialogue” conversations about racism.

Pictured: Group of local facilitators after a Deep Dive Dialogue session | Dr. Fran Kaplan and Reggie Jackson of Nurturing Diversity Partners

Norskedalen Preserving Engum House

Funded by: Durtsche Family Fund, Community Giving Fund

Norskedalen received a \$7,836 grant to fix the Engum House, it's most-toured historic home built by one of the earliest Norwegian settlers to the area. Several of the original wood beams needed emergency replacement in 2019.



EDUCATION & SCHOLARSHIPS

Forming great futures



Best Buddies Wisconsin New chapter at UW-La Crosse

Funded by: PMJ Fund, Community Giving Fund

Best Buddies Wisconsin received a \$3,500 grant to launch a school friendship program chapter at UW-La Crosse. Best Buddies recruits student leaders to form buddy pairs with people with intellectual and developmental disabilities to help encourage confidence, self-advocacy, and self-sufficiency.

Scholarship thank you letter

Dear Ms. Schloegel,

I'd like to thank you for the John and Adeline Rice Scholarship. Although I never knew these two adults, I think it shows a lot that John and Adeline Rice would still put money aside to help students in their future endeavors, despite not having children of their own. They still understood the difficulties that many of us have to go through today, and wanted to bequeath some of their money to students in need - like me - that will struggle to pay for college. Even though John and Adeline Rice may no longer be with us, I can truthfully say that their lasting kindness has affected me, and that is a gift. Once again, I'd like to thank you for choosing me for this scholarship and for carrying on the wish that John and Adeline Rice left behind.

Sincerely,
Erin, a 2019 scholarship recipient



COMMUNITY IMPROVEMENT

Transforming a better La Crosse County



Shelter Development, Inc. **theExchange**

Funded by: Bob and Jean Marck Family Fund, La Crosse SOUP Fund, Johns Flaherty Collins – Michael Stoker Memorial Fund, Norman L. Gillette, Sr. Family Fund

Shelter Development’s program theExchange was awarded \$13,026 in 2019 to support the cost of renting their warehouse and other expenses. Generous people can repurpose gently-used furniture and housewares by donating them to theExchange, where volunteers then deliver items to households in need. This volunteer-driven program provided over 500 households with furniture and housewares in 2019.

Pictured: theExchange’s crew of volunteers | Volunteer Bryce Lord delivers a mattress to a home



Catholic Charities of the Diocese of La Crosse **Coulee Collaborative to End Homelessness**

Funded by: Robert and Eleanor Franke Charitable Fund

The Coulee Collaborative to End Homelessness received a \$70,146 grant to help transform the current local homeless management system from a crisis system to a more effective and humane preventions system.

Pictured: Members of the collaborative’s Consumer Advisory Council volunteer during their Downtown Neighborhood Block Party Clean-Up event | LCF staff Jamie Schloegel and Katie Berkedal present the check to Sister Karen Neuser, FSPA, and collaborative coordinator Julia McDermid

Rotary Works Foundation, Inc. **Riverside Park Bandshell**

Funded by: Bonney Family Fund, Nancy Fulkerson Hill and Edwin L. Hill Fund, Cheryl and Cindy Vieth Fund, Tom and Ann Monson Family Fund, Sundet Family Fund, Ellen and Henry Funk Family Fund, Graw Family Fund, and the Community Giving Fund

Rotary Works Foundation received a \$31,750 grant to support the construction of the new bandshell at Riverside Park in La Crosse. The bandshell will be complete in 2020 and enjoyed by musicians and concert-goers alike for generations to come.



Chileda Institution, Inc.

Snoezelen Room

Funded by: Community Giving Fund

Chileda received a \$10,000 grant to create a “Snoezelen” room, a therapeutic sensory environment that helps individuals with intellectual disabilities feel calm, supported, and focused. For people with sensory processing challenges, any negative sensory input (such as a tag on clothing for example) can cause dysregulation that can lead to escalating behaviors. Students at Chileda can now leave environments where they are becoming dysregulated and use the Snoezelen room to help regulate themselves through the exploration of positive sensory inputs.



The Salvation Army

Emergency Shelter Program

Funded by: Ellen and Henry Funk Family Fund, Fowler and Hammer Fund, Fred and Deb Wakeen Fund, Richard H. Masrud Memorial Fund, Hutson Family Fund, Graw Family Fund, Davy Family Fund, George and Virginia Schneider Family Fund, Joseph W. Kotnour Family Fund, M. Elizabeth Cason Fund, Chester and Veronica Ware Fund, Tom and Judy Sleik Family Fund, Cheryl and Cindy Vieth Fund, Robert and Eleanor Franke Charitable Fund

The Salvation Army received \$70,975 in unrestricted grants to support their emergency shelter program. Shelter clients receive free meals, an opportunity to shower, access to laundry facilities, and are assigned a case manager. Approximately 700 men, women, and children were provided immediate housing through the emergency shelter program in 2019.





Bethany Lutheran Homes, Inc.

Hearten House II

Funded by: Jack and Kathy Lucey Family Fund for Alzheimer's

Jack and Kathy Lucey awarded a grant from their fund to support Hearten House II of Bethany Lutheran Homes, Inc., where residents receive care for dementia.

Pictured: Jack and Kathy Lucey with LCF's Jamie Schloegel surprised Hearten House II with a donation on Giving Tuesday



FAITH

Transcending places of worship



**Trinity Lutheran Church
First Teen Clothes Closet**

Funded by: Robert and Eleanor Franke Charitable Fund

First Teen Clothes Closet received a \$7,500 grant to support the purchase of new athletic shoes, socks, undergarments, and ethnic hair kits for their teen shoppers. Gently-used clothing is donated to the closet where local teens can come and shop for free clothing and toiletries in this boutique-style layout that includes gender-neutral shopping spaces, private dressing rooms, and positive representation of race and body sizes.



**Congregation Sons of Abraham
Community Education
Program Sponsorship**

Funded by: Robert and Maureen Freedland Community Fund for Studies of the Shoah (Holocaust)

Congregation Sons of Abraham received a grant to support a presentation by historian Michael Luick-Thrams that discussed the history of Midwestern responses to the Holocaust. The presentation focused on the Scattergood Hostel in Iowa, opened in 1939 by Quaker farmers and college students as a sanctuary to Jews, political dissidents, intellectuals, and artists fleeing Nazi-occupied countries.

Pictured: Dr. Michael Luick-Thrams with Beth Moore and June Kjome



**Franciscan Spirituality Center
Retreat for Survivors of Trauma**

Funded by: Robert and Eleanor Franke Charitable Fund

The Franciscan Spirituality Center received a \$6,700 grant to support their annual retreat for survivors of trauma. The retreat is full of healing and soul-nourishing opportunities to help survivors of human trafficking, sexual and physical abuse, PTSD, and other forms of trauma gain back a sense of dignity and self-worth.

Pictured: A participant creates a finger labyrinth during the retreat



RECREATION & WELLNESS

Inspiring healthy living



Central Cross-Country Skiing, Inc. Nordic Rocks

Funded by: Community Giving Fund

Central Cross-Country Skiing, Inc., received a \$4,500 grant to support the expansion of their Nordic Rocks program to Holmen elementary schools. Participating schools can incorporate cross-country ski lessons into winter physical education curriculum, allowing students another fun way to enjoy the outdoors during the cold, snowy months.



Gateway Area Boy Scouts

Preparing Kids For Today And For Life

Funded by: Davy Family Fund, Wayne J. Hood Fund, Community Giving Fund

Gateway Area Boy Scouts received over \$9,000 in programmatic support, including funds to create a new cub scout pack at Hamilton Elementary School.

Pictured: Area scouts hang out at Camp Decorah in Holmen



Boys & Girls Clubs of Greater La Crosse

Holmen Area Boys & Girls Club

Funded by: Schloegel Family Fund for Kids, Robert and Eleanor Franke Charitable Fund, Norman L. Gillette, Sr. Family Fund, Community Giving Fund

The Boys & Girls Clubs of Greater La Crosse received \$201,000 to support the build of the new club and community center in Holmen.

Pictured: Executive Director Jamie Schloegel presents a check to Boys & Girls Club Executive Director Jake Erickson with Dave Skogen, who with wife Barb, donated the building and a multi-million dollar contribution



ENVIRONMENT

Appreciating natural resources



GROW La Crosse

Say it! Sharing Children’s Knowledge of Healthy Green Spaces with the Community

Funded by: Community Giving Fund

GROW La Crosse received a \$4,000 grant to help empower children to share their knowledge about planting local food, rain gardens, and pollinator plants with the larger community. Students made signs to share messages about the environment during free community days at Deep Roots Community Farm. GROW is confident their hive of green-thumbed children will inspire others to grow food, plant pollinators, and create rain gardens to benefit the environment and health of the community.

Pictured: Students at State Road Elementary School lead Rep. Jill Billings on a tour of their hoop house, garden, and pollinator patch



Friends of the Refuge - Mississippi River Pools 7 & 8

Environmental Education Supplies

Funded by: PMJ Fund

Friends of the Refuge - Mississippi River Pools 7 & 8 received a \$3,000 grant to purchase environmental education supplies to help refuge staff better engage participants in their many programs and displays. Ultimately, participants will have a better understanding and appreciation for the refuge, their connection to it, and charge to protect the resources within it.



TRUST-BASED PHILANTHROPY

By: Program Director Katie Berkedal

The theme of this impact report is “Protecting Our Community’s Greatest Assets.” The financial resources donors entrust to our stewardship, the local charitable organizations we support, and the people and places they enrich with their missions are all community assets we seek to protect through service.

As program director, my role is to connect local charitable organizations to funding and evolve our grantmaking practices to ensure the support we offer is most effective. Part of that evolution includes a move from a traditional grant-making model to a trust-based philanthropy model.

We are in the process of reimagining funder-grantee relationships. We’ve made a move to simplify grant paperwork, and we aim to be transparent and responsive to the needs of charitable organizations. Our hope is that these efforts will reduce the power imbalance so common between foundations and nonprofits, as we believe philanthropy is much more effective when we approach grantee relationships from a place of trust, humility, and honesty.

We are more interested in the impact and mission of nonprofits than their overhead cost ratio. We recognize that grantees are the experts in what they do and trust they know best how to execute their plans for mission advancement.

As a funder, we strive to provide support beyond the check. We continue to offer our local nonprofits regular opportunities for professional education and connection with peers in the field, and we will continue to build and nurture these peer-learning networks.

Our local charitable organizations will always have important work to do, as our community will forever face obstacles that challenge well-being in our great river valley. That’s why we remain steadfast in our commitment to be a trusted ally, so together we can make the most of our greatest assets.

CONTACT KATIE BERKEDAL

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Katie@laxcommfoundation.com

2019 GRANTS & SCHOLARSHIPS

Administrative Endowment Fund of LCF Maureen L. Kinney Fund

Adult & Teen Challenge of Western Wisconsin Inc. Community Giving Fund Special Initiative Fund

Affinity for Dance Inc. Community Giving Fund

Agape Pregnancy Resource Center Inc. George and Virginia Schneider Family Fund

All Abilities Trane Park Fund JARD Fund

Alley Cat Allies Inc. Bob and Jean Marck Family Fund

American Association of University Women-La Crosse Branch Carol A. Dobrunz Memorial Scholarship

American Indian Education Fund M. Elizabeth Cason Fund Bob and Jean Marck Family Fund

American Red Cross Southwest Chapter M. Elizabeth Cason Fund Chester and Veronica Ware Fund

Animal Rights Coalition Bob and Jean Marck Family Fund

Aptiv Inc. William & Cynthia Berg Family Fund Ruth M. Dalton, M.D. Fund Guentner-Froegel Family Fund Community Giving Fund Community Impact Fund Audrey and Donald Medinger Family Fund Duane and Carol Taebel Fund Stephen and Katherine Webster Fund

Aquinas Catholic Schools Foundation, Inc. Fowler and Hammer Fund Fred and Mary Ann Funk Family Fund Harry L. and Charlotte L. Woods Family Fund Corinne Zielke Fund

Arts at Large Inc. Bob and Jean Marck Family Fund

Auburn Valley Humane Society Bradley and Lynn Sturm Family Fund

AVCAP Corporation Community Impact Fund

Barb and Donald Frank Fund Sullivan Fund

Best Buddies WI Community Giving Fund PMJ Fund

Bethany Lutheran Homes, Inc. d/b/a Eagle Crest Communities Bethany Lutheran Homes, Inc. Endowment Community Impact Fund Kathy and Jack Lucey Family Fund for Alzheimer's Connie Repnik Memorial Fund

Bicycle Federation of Wisconsin Warren and Denise Loveland Family Fund

Big Brothers Big Sisters of the 7 Rivers Region Robert & Eleanor Franke Charitable Fund Warren and Denise Loveland Family Fund Bob and Jean Marck Family Fund

Black Leaders Acquiring Collective Knowledge (BLACK) Inc. Eric and Sandy Brekke Family Fund Community Impact Fund

Blessed Sacrament Catholic Church La Crosse Knights of Columbus Charity Fund Chester and Veronica Ware Fund

Boys & Girls Clubs of Greater La Crosse Dr. Archie and Rosemary Britt Family Fund Robert & Eleanor Franke Charitable Fund Norman L. Gillette, Sr. Family Fund Community Giving Fund Graw Family Fund Community Impact Fund Kerbaugh Family Fund Lommen Boys & Girls Club Scholarship Warren and Denise Loveland Family Fund Bob and Jean Marck Family Fund Amie L. Mathy Center for Recreation and Education Endowment Schilling Family Fund Schloegel Family Fund for Kids Corinne Zielke Fund

Boys and Girls Clubs of Central Sonoma County Charles F. Mathy Family Fund

Carleton College Schilling Family Fund

Cathedral of Saint Joseph the Workman Davy Family Fund La Crosse Knights of Columbus Charity Fund

Catholic Charities of the Diocese of La Crosse Richard W. Brown Family Fund Robert & Eleanor Franke Charitable Fund La Crosse Knights of Columbus Charity Fund Audrey and Donald Medinger Family Fund Paque Family Fund Bradley and Lynn Sturm Family Fund

Causeway Interfaith Volunteer Caregivers, Inc. Robert & Eleanor Franke Charitable Fund

Central Cross Country Skiing, Inc. Community Giving Fund

Chasing Daylight Animal Shelter Richard H. Masrud Memorial Fund

Children of Destiny Community Giving Fund

Children's Museum of La Crosse, Inc. Children's Museum of La Crosse Endowment Hutson Family Fund Community Impact Fund George and Virginia Schneider Family Fund

Chileda Institute, Inc. Community Giving Fund

Christ Episcopal Church Christ Episcopal Church Historic Preservation Endowment Wayne J. Hood Fund Father Christopher Pratt Memorial Fund

Cia Siab Inc. Francie Ball & Mary O'Sullivan Fund Robert & Eleanor Franke Charitable Fund

City of La Crosse Community Giving Fund

City of La Crosse Fire Department Community Giving Fund Community Impact Fund

City of La Crosse Parks, Recreation & Forestry Pettibone Park Commission Endowment

City of La Crosse Police Department Fowler and Hammer Fund

Community Giving Fund of La Crosse Community Foundation Dr. Gunnar and Mary Baldwin Gundersen Memorial Fund Dr. David L. and Sacia B. Morris Fund Schilling Family Fund

Congregation Sons of Abraham Maureen and Robert Freedland Community Fund for Studies of the Shoah (Holocaust)

Consumer Reports Warren and Denise Loveland Family Fund

Coon Valley Area Baseball Association Inc. Brian and Karen Rude Family Fund

Coulee Council on Addictions Fowler and Hammer Fund Dr. Frank Furlano Family Fund Norman L. Gillette, Sr. Family Fund Community Giving Fund Community Impact Fund Jack and Marti Schwem Impact Fund Paul and Barb Leehey Impact Fund Jacob Christian Lillejord Memorial Fund aka "Jacob's Ladder" Audrey and Donald Medinger Family Fund Schilling Family Fund Jack and Marti Schwem Fund

Coulee Reading Center, Inc. Richard W. Brown Family Fund

Coulee Region Humane Society M. Elizabeth Cason Fund Kerbaugh Family Fund Charles F. Mathy Fund Duane and Carol Taebel Fund

Coulee Region System of Care Inc. Community Impact Fund

Couleecap, Inc. MLB MKB Bottcher Family Fund Robert & Eleanor Franke Charitable Fund Maureen Freedland Social and Environmental Justice Fund Norman L. Gillette, Sr. Family Fund Community Impact Fund Johns Flaherty Collins-Michael Stoker Memorial Fund

Diocese of La Crosse Davy Family Fund Fowler and Hammer Fund Charles F. Mathy Fund Father Christopher Pratt Memorial Fund

Doctors Without Borders USA Warren and Denise Loveland Family Fund

Emergency Food Basket, Inc. M. Elizabeth Cason Fund

English Lutheran Church Duane and Carol Taebel Fund

Essential Health Clinic Barbara and Donald Frank Family Fund Strong Girls Strong Women Fund

Faith United Methodist Church Dr. Archie and Rosemary Britt Family Fund

Family & Children's Center American Association of University Women-La Crosse Branch William & Cynthia Berg Family Fund Blahnik-Naugler Help Fund for Women Dr. Archie and Rosemary Britt Family Fund La Crosse Family and Children's Center Endowment

Robert & Eleanor Franke Charitable Fund
 Jack and Marti Schwem Impact Fund
 Kerbaugh Family Fund
 Warren and Denise Loveland Family Fund
 Milo and Beverly Mayer Mach Family Fund
 Jack and Marti Schwem Fund
 Margery J. Stansfield Fund
 Bernadette Teff Family Fund
 Fred and Deb Wakeen Fund

Feline Rescue Inc.
 Bob and Jean Marck Family Fund

First Congregational Church
 William C. Jr. and Scott Pickett Memorial Fund

First Evangelical Lutheran Church
 Harold "Pete" Isenman Fund

First Lutheran Church
 Robert & Eleanor Franke Charitable Fund

First Presbyterian Church
 Harry L. and Charlotte L. Woods Family Fund

Folds of Honor Arizona Chapter
 Graw Family Fund

Franciscan Sisters of Perpetual Adoration
 American Association of University Women-La
 Crosse Branch
 Robert & Eleanor Franke Charitable Fund
 George and Virginia Schneider Family Fund

Friends of Coulee Region RSVP
 Audrey and Donald Medinger Family Fund

Friends of the Blufflands Inc.
 Shelterbelt Fund

Friends of the Mississippi River
 Bob and Jean Marck Family Fund

**Friends of the Refuge-Mississippi
 River Pools 7 & 8**
 PMJ Fund

**Friends of the Upper
 Mississippi Fishery Services**
 Roch Kendrick Memorial Fund

Gateway Area Boy Scouts
 Davy Family Fund
 Community Giving Fund
 Wayne J. Hood Fund
 La Crosse Knights of Columbus Charity Fund

Gathering Waters Inc.
 Warren and Denise Loveland Family Fund

**Girl Scouts of
 Wisconsin-Badgerland Council**
 Roland Beranek Fund
 Norman L. Gillette, Sr. Family Fund
 Community Giving Fund
 Schilling Family Fund

Good Fight Community Center Inc.
 Community Giving Fund
 Audrey and Donald Medinger Family Fund
 David R. Morrison Family Fund
 National Youth Sports Program Fund
 Carol and Duane Taebel Family Fund

Great Rivers United Way
 Community Giving Fund
 James and Ellen Heinecke Fund
 Jack and Marti Schwem Impact Fund
 Paul and Barb Leehey Impact Fund
 Dr. David L. and Sacia B. Morris Fund
 Schilling Family Fund
 Jack and Marti Schwem Fund

Grow La Crosse Inc.
 Community Giving Fund
 Myrick Hixon EcoPark Fund
 George and Virginia Schneider Family Fund
 Kurt and Julie Schroeder Family Fund
 Shelterbelt Fund

Gundersen Medical Foundation
 Davy Family Fund
 Fowler and Hammer Fund
 Ellen and Henry Funk Family Fund
 Fred and Mary Ann Funk Family Fund
 Community Giving Fund
 Dr. Gunnar and Mary Baldwin Gundersen
 Memorial Fund
 Harold "Pete" Isenman Fund
 Paul and Barb Leehey Impact Fund
 Connie Replik Memorial Fund
 Schilling Family Fund
 Bradley and Lynn Sturm Family Fund
 Duane and Carol Taebel Fund
 Chester and Veronica Ware Fund
 Wishland Pony Express Fund
 Harry L. and Charlotte L. Woods Family Fund

Habitat for Humanity-La Crosse Area
 Community Impact Fund
 Warren and Denise Loveland Family Fund

**Hmoob Cultural and
 Community Agency (HCCA)**
 Audrey and Donald Medinger Family Fund

Holmen Area Community Center Inc.
 Community Impact Fund

Holy Trinity Catholic Church
 La Crosse Knights of Columbus Charity Fund

Honor The Earth
 Bob and Jean Marck Family Fund

HorseSense
 Richard W. Brown Family Fund
 Community Giving Fund
 Community Impact Fund
 Fred and Deb Wakeen Fund

HSHS Sacred Heart Foundation
 Schilling Family Fund

Hunger Task Force of La Crosse, Inc.
 Richard W. Brown Family Fund
 Robert & Eleanor Franke Charitable Fund
 Kerbaugh Family Fund
 Bob and Jean Marck Family Fund
 George and Virginia Schneider Family Fund
 Rudy and Jean Schnurrer Fund
 Steven P. and Suzanne R. Tanke Family Fund

James and Elyn Ash Family Fund
 Sullivan Fund

JDRF International
 Howard Dahl Fund
 Charles F. Mathy Fund
 Schloegel Family Fund for Kids

Jim's Grocery Bag Fund
 Bob and Jean Marck Family Fund
 Amie L. Mathy Family Fund
 Sullivan Fund

Joe Was Just Joe Foundation Inc.
 The Covenant Fund
 Schilling Family Fund

June Kjome Justice and Peace Fund
 Ardus and John Cleveland Family Fund

Junior Achievement of Wisconsin
 Schilling Family Fund

La Crescent Area Event Center Inc.
 James D. and Janice M. Hanesworth Fund

La Crosse Area Family YMCA
 Davy Family Fund
 Norman L. Gillette, Sr. Family Fund
 Wayne J. Hood Fund
 Harold "Pete" Isenman Fund
 Warren and Denise Loveland Family Fund
 Richard H. Masrud Memorial Fund
 Mary Grace Sieber Fund
 Stansfield Family Fund
 YMCA Fund

**La Crosse Area Underwater
 Rescue and Recovery Unit**
 Barbara and Dave Erickson Fund
 Robert & Eleanor Franke Charitable Fund

La Crosse Chamber Chorale, Inc.
 The Bonney Family Fund
 La Crosse Chamber Chorale Fund
 Community Impact Fund

La Crosse Community Theatre
 The Covenant Fund
 Robert & Eleanor Franke Charitable Fund
 Gretchen Guernsey Leigh Fund

La Crosse Concert Band
 Ella F. Ambrosius Fund
 La Crosse Concert Band Endowment

La Crosse County Aging Unit
 Kathy and Jack Lucey Family Fund for Alzheimer's

La Crosse County Health Department
 Community Giving Fund

La Crosse County Historical Society
 Davy Family Fund
 Anita and Robert Funke Historical Society Fund
 Community Giving Fund
 Harrington Fund
 La Crosse County Historical Society Endowment
 Community Impact Fund
 Gretchen Guernsey Leigh Fund
 Warren and Denise Loveland Family Fund
 Milo and Beverly Mayer Mach Family Fund

La Crosse County Human Services
 Erickson Sisters' Fund
 Community Impact Fund
 La Crosse SOUP Fund

La Crosse Dubna Friendship Association Inc.
 Sandra and Richard McCormick Citizen
 Diplomacy Fund

La Crosse Jail Ministry
 Paque Family Fund

La Crosse Jazz Orchestra Fund
 Community Giving Fund
 Gertrude Salzer Gordon Concert in the Park Fund
 Bob and Jean Marck Family Fund

La Crosse Lions Charities, Inc.
 Community Giving Fund

La Crosse Neighborhoods Inc.
 Community Giving Fund
 La Crosse SOUP Fund

2019 GRANTS & SCHOLARSHIPS

La Crosse Promise Inc.

Community Giving Fund
Community Impact Fund
Warren and Denise Loveland Family Fund

La Crosse Public Education Foundation - Swantz Fund

Community Giving Fund

La Crosse Public Education Foundation, Inc.

William & Cynthia Berg Family Fund
The Covenant Fund
Fowler and Hammer Fund
Maureen and Robert Freedland- LPEF Fund for Studies of the Shoah
Community Giving Fund
Sally A. Grimslid Memorial Fund for Northside Elementary
Dr. Gunnar and Mary Baldwin Gundersen Memorial Fund
Community Impact Fund
Kids for Kids Fund-LPEF
June Kjome Justice and Peace Fund
La Crosse Public Education Foundation Endowment
La Crosse Public Education Foundation - Swantz Fund
Bob and Jean Marck Family Fund
David R. Morrison Family Fund
Schilling Family Fund
George and Virginia Schneider Family Fund
Mary Grace Sieber Fund
Tom and Judy Sleik Family Fund
Duane and Carol Taebel Fund
Carol Taebel "Thank a Teacher" Fund

La Crosse Public Library

Dr. Gunnar and Mary Baldwin Gundersen Memorial Fund
Tom and Judy Sleik Family Fund

La Crosse SOUP Fund of La Crosse Community Foundation

Community Impact Fund

La Crosse Symphony Orchestra, Inc.

Ella F. Ambrosius Fund
Margaret Forseth Burgess Music Fund
Ruth M. Dalton, M.D. Fund
The Elliott Family Fund
Community Impact Fund
Marie Louise Lokken Fund
Richard H. Masrud Memorial Fund

Lake Onalaska Protection and Rehabilitation District

Fred and Mary Ann Funk Family Fund

League of Women Voters of the La Crosse Area

Garrity-Gokey Fund
Community Impact Fund

Logan Booster Club

Barbara and Dave Erickson Fund
Chad Erickson Memorial Fund

Marine Credit Union Foundation

Robert & Eleanor Franke Charitable Fund

Marquette University

Davy Family Fund

Mary Mother of the Church

La Crosse Knights of Columbus Charity Fund

Maureen and Robert Freedland Community Fund for Studies of the Shoah (Holocaust)

Community Giving Fund

Mayo Clinic Health System — Franciscan Medical Center Inc.

Ruth M. Dalton, M.D. Fund
Davy Family Fund
Fowler and Hammer Fund
Schilling Family Fund

Mental Health Coalition of the Greater La Crosse Area

Paque Family Fund
Schilling Family Fund
Morris A. and Roberta Anne Severson Fund

Mid West Music Fest

Community Impact Fund

Mississippi Valley Conservancy

The Elliott Family Fund
Fowler and Hammer Fund
Fred and Mary Ann Funk Family Fund
Community Giving Fund
Community Impact Fund
Milo and Beverly Mayer Mach Family Fund

Missouri River Bird Observatory

Warren and Denise Loveland Family Fund

Mobile Meals of La Crosse

Bob and Jean Marck Family Fund
Stephen and Katherine Webster Fund

Monroe County Shelter Care Inc.

American Association of University Women-La Crosse Branch

NAMI La Crosse County Inc.

William C. Jr. and Scott Pickett Memorial Fund

National Audubon Society

Warren and Denise Loveland Family Fund

National Park Foundation

Warren and Denise Loveland Family Fund

Natural Resource Foundation of Wisconsin

Warren and Denise Loveland Family Fund

New Horizons Shelter & Outreach Ctrs.

American Association of University Women-La Crosse Branch

William & Cynthia Berg Family Fund
M. Elizabeth Cason Fund
Barbara and Donald Frank Family Fund
Rev. Ronald and Merle Gustafson Fund
James and Ellen Heinecke Fund
Community Impact Fund
June Kjome Justice and Peace Fund
Milo and Beverly Mayer Mach Family Fund
Chester and Veronica Ware Fund

No Kill Law & Advocacy Center

Bob and Jean Marck Family Fund

Norskedalen Nature and Heritage Center, Inc.

Durtsche Family Fund
Community Giving Fund
Community Impact Fund
Kurt and Julie Schroeder Family Fund
Fred and Deb Wakeen Fund

Onalaska Enhancement Foundation

Harold E. Lemke Fund

Onalaska Fdn. Educational Excellence

Onalaska Foundation for Educational Excellence, Inc. Fund

Onward Hope, Inc.

Warren and Denise Loveland Family Fund

Our Savior's Lutheran Church

Kathryn, Olaus, and Dena Cappelen Fund
The Covenant Fund
Connie Repnik Memorial Fund
Schilling Family Fund

Outdoor Recreation Alliance of the Seven Rivers Region, Inc.

Community Giving Fund
Charles F. Mathy Fund

Pediatric Dental Initiative of the North Coast Inc.

Charles F. Mathy Family Fund

Physicians Committee for Responsible Medicine

Bob and Jean Marck Family Fund

Place of Grace

Ellen and Henry Funk Family Fund
Audrey and Donald Medinger Family Fund

Planned Parenthood Minnesota, North Dakota, South Dakota

Bob and Jean Marck Family Fund

Planned Parenthood of Wisconsin, Inc.

Community Impact Fund
Warren and Denise Loveland Family Fund
Bob and Jean Marck Family Fund

Preservation Alliance of La Crosse

The Elliott Family Fund
Warren and Denise Loveland Family Fund

Providence School Inc.

La Crosse Knights of Columbus Charity Fund

Rails-to-Trails Conservancy

Warren and Denise Loveland Family Fund

Rappahannock Pantry, Inc.

Warren and Denise Loveland Family Fund

Reigning Grace Ranch

Graw Family Fund

Riverside International Friendship Gardens

Fred and Mary Ann Funk Family Fund
Community Giving Fund
Richard H. Masrud Memorial Fund

Ronald McDonald House Charities of W Wisconsin & SE MN Inc.

Schilling Family Fund

Roncalli Newman Catholic Center

La Crosse Knights of Columbus Charity Fund

Rotary Works Foundation, Inc.

The Bonney Family Fund
Robert & Eleanor Franke Charitable Fund
Ellen and Henry Funk Family Fund
Community Giving Fund
Graw Family Fund
Nancy Fulkerson Hill and Edwin L. Hill Fund
La Crosse Jazz Orchestra Fund
Richard H. Masrud Memorial Fund
Tom and Ann Monson Family Fund
Sundet Family Fund
Cheryl and Cindy Vieth Fund

Sacred Grounds Coffee Sanctuary Ltd

Tom and Ann Monson Family Fund

School District of Bangor

Community Impact Fund
Jim's Grocery Bag-Schroeder Fund

School District of Holmen

Community Giving Fund
Community Impact Fund
Jim's Grocery Bag-Schroeder Fund

School District of La Crosse

Julianna and Steven Blanchar Kindergarten Trip Fund
Richard W. Brown Family Fund
Community Giving Fund

Global Awareness Fund
Community Impact Fund
James Gokey Endowment Fund aka Jim's Grocery Bag Fund
Jim's Grocery Bag-Schroeder Fund
June Kjome Justice and Peace Fund
La Crosse Public Elementary School Field Trip Fund
La Crosse SOUP Fund
George and Virginia Schneider Family Fund
Corinne Zielke Fund

School District of Onalaska

Community Giving Fund
Global Awareness Fund
Community Impact Fund
Jim's Grocery Bag-Schroeder Fund
Maureen L. Kinney Fund
George and Virginia Schneider Family Fund
Tom & Trudy Kennedy Endowment Fund aka Tom's Grocery Bag Fund

School District of West Salem

Community Impact Fund
Jim's Grocery Bag-Schroeder Fund
Corinne Zielke Fund

Seven Rivers Robotics Coalition Inc.

Louis I. Rehfuss Fund

She Rock She Rock

Bob and Jean Marck Family Fund

Shelter Development Inc.

Norman L. Gillette, Sr. Family Fund
Johns Flaherty Collins-Michael Stoker Memorial
La Crosse SOUP Fund
Bob and Jean Marck Family Fund

Shriners Hospital for Children

Connie Repnik Memorial Fund

Sleep in Heavenly Peace

La Crosse SOUP Fund

Southern Poverty Law Center, Inc.

Bob and Jean Marck Family Fund

Sports Mentorship Academy

Community Giving Fund

St. Clare Health Mission

James and Ellyn Ash Family Fund
M. Elizabeth Cason Fund
Jack and Marti Schwem Impact Fund
Gretchen Guernsey Leigh Fund
Amie L. Mathy Family Fund
Schilling Family Fund
Jack and Marti Schwem Fund
Tom and Judy Sleik Family Fund
Fred and Deb Wakeen Fund

St. Elias Eastern Orthodox Church

Baltz Family Fund

St. Jude Children's Research Hospital

Richard H. Masrud Memorial Fund

St. Louis University

Community Impact Fund

St. Olaf College

Schilling Family Fund

St. Paul Evangelical Lutheran Church

St. Paul's Evangelical Lutheran Church of Onalaska Fund

Stout University Foundation Inc.

Schilling Family Fund

The Animal Sanctuary of St. Croix Valley

Bob and Jean Marck Family Fund

The Elephant Sanctuary in Tennessee

Bob and Jean Marck Family Fund

The Green House dba Malaria Consortium

Bradley and Lynn Sturm Family Fund

The Nature Conservancy

Warren and Denise Loveland Family Fund

The Pump House Regional Arts Center, Inc.

Jack and Marti Schwem Impact Fund

The Salvation Army

M. Elizabeth Cason Fund
Davy Family Fund
Fowler and Hammer Fund
Robert & Eleanor Franke Charitable Fund
Ellen and Henry Funk Family Fund
Graw Family Fund
Hutson Family Fund
Community Impact Fund
Kerbaugh Family Fund
Joseph W. Kotnour Family Fund
Richard H. Masrud Memorial Fund
Salvation Army, La Crosse WI Endowment
George and Virginia Schneider Family Fund
Tom and Judy Sleik Family Fund
Fred and Deb Wakeen Fund
Chester and Veronica Ware Fund

Town of Shelby

Corinne Zielke Fund

Trinity Lutheran Church

Robert & Eleanor Franke Charitable Fund

Unitarian Universalist Fellowship of La Crosse

Robert & Eleanor Franke Charitable Fund

United Fund for the Arts and Humanities

Arthus and John Cleveland Family Fund
Norman L. Gillette, Sr. Family Fund
Milo and Beverly Mayer Mach Family Fund
Dr. David L. and Sacia B. Morris Fund
Schilling Family Fund
United Fund for the Arts and Humanities Endowment

University of Wisconsin Foundation

Davy Family Fund

US Friends of David Sheldrick Wildlife Trust Inc.

Bob and Jean Marck Family Fund

UW-La Crosse

Global Awareness Fund
La Crosse Bridge Builders Fund

UW-La Crosse Foundation

American Association of University Women-La Crosse Branch
William S. Case Scholarship
Davy Family Fund
Norman L. Gillette, Sr. Family Fund
Community Giving Fund
Gertrude and Donald "Sandy" Gordon Jazz Scholarship
Betty and Dale Kendrick Art Scholarship
Inez and Nick Konas Memorial Scholarship
Jason David Koppelman Scholarship
Logan High School Math and Computer Science Scholarship
Mitchell-Kruck Scholarship
Robert and Ruth Pribek Memorial Scholarship
Donald P. Weber Veteran Scholarship Fund

VARC, Inc.

Special Initiative Fund

Verdecare Inc.

Graw Family Fund

Village of Holmen

Corinne Zielke Fund

Viterbo University

Ella F. Ambrosius Fund
William S. Case Scholarship
Fowler and Hammer Fund
Norman L. Gillette, Sr. Family Fund
Community Giving Fund
Glendenning Family Fund
Bob and Jean Marck Family Fund
Amie L. Mathy Center for Recreation and Education Endowment
Richard T. Record Fund
Donald P. Weber Veteran Scholarship Fund

Vivent Health

Community Giving Fund

Voces De La Frontera, Inc.

Bob and Jean Marck Family Fund

WAFER, Inc.

James and Ellyn Ash Family Fund
William & Cynthia Berg Family Fund
M. Elizabeth Cason Fund
Ellen and Henry Funk Family Fund
Kerbaugh Family Fund
Bob and Jean Marck Family Fund
Schilling Family Fund
Wake Forest University

Weigh of Life

Schilling Family Fund

Western Technical College Foundation Inc.

American Association of University Women-La Crosse Branch
Scott and Heidi Blanke Family Fund
The Covenant Fund
Ernest and Olive Gershon Scholarship
Norman L. Gillette, Sr. Family Fund
Community Giving Fund
Glendenning Family Fund
Bob and Jean Marck Family Fund
Don Olson Hospitality Scholarship
Donald P. Weber Veteran Scholarship Fund

Wisconsin American Legion Foundation

Corinne Zielke Fund

Wisconsin Badger Camp, Inc.

Community Giving Fund
Alice O. Gordon & Viola M. Forshler Fund

Wisconsin Challenge Academy

The Covenant Fund

Wisconsin Council of the Blind & Visually Impaired Inc.

Coulee Region White Cane Club Fund

Wisconsin Historical Foundation Inc

Warren and Denise Loveland Family Fund

WisCorps, Inc.

Chad Erickson Memorial Park Fund
Robert & Eleanor Franke Charitable Fund
Community Giving Fund
Warren and Denise Loveland Family Fund
Carol and Duane Taebel Family Fund

Women's Fund of Greater La Crosse, Inc.

CMG Women's Fund
Jean L. Foss-Norene A. Smith Fund-WF
Barbara and Donald Frank Family Fund
Norman L. Gillette, Sr. Family Fund
Jack and Marti Schwem Impact Fund
Betty Levinstein Fund-WF
Warren and Denise Loveland Family Fund
Bob and Jean Marck Family Fund
Joan and Paul Schoenfeld Fund- WF
Stansfield Family Fund
Pamela and Richard Strauss Fund- WF
Women's Fund of Greater La Crosse
Women's Fund of the La Crosse Community Foundation
Roberta Zurn Fund

YWCA La Crosse

American Association of University Women-La Crosse Branch
Community Impact Fund
Shelterbelt Fund

FUNDS OF La Crosse Community Foundation

We are proud to partner with hundreds of committed individuals and families to design giving plans that support the causes, agencies, or issues they care about now and into the future. We owe a debt of gratitude to all our donors whose thoughtful philanthropic planning has resulted in the establishment of the following funds.



DONOR ADVISED FUNDS

The most flexible and personal fund type for donors who desire the privilege to recommend annual grants from the fund's earnings to any qualified nonprofit organization anywhere in the world.



\$555,614 in
Donor Advised Grants
Dispersed in 2019

American Association of University Women-La Crosse Branch Fund (2010)

James and Ellyn Ash Family Fund (2003)

Francie Ball & Mary O'Sullivan Fund (2016)

Baltz Family Fund (1987)

William & Cynthia Berg Family Fund (2013)

Tom and Laurie Berkedal Family Fund ◀ NEW!

Blahnik-Naugler Help Fund for Women (2003)

Bonney Family Fund (2015)

MLB-MKB Bottcher Family Fund (2004)

Bramschreiber Family Fund in Memory of Karl Bramschreiber (2016)

Judy and Dave Bouffleur Fund ◀ NEW!

Brekke Family Fund (2018)

Eric and Sandy Brekke Family Fund (2013)

Richard W. Brown Family Fund (2007)

Christ Episcopal Church Historic Preservation Fund (2006)

Russell G. and Gail K. Cleary Fund (1986)

Ardus and John Cleveland Family Fund (2012)

The Covenant Fund (2016)

Daniel's Song (2018)

Davy Family Fund (1993)

Durtsche Family Fund (2004)

**John Edwards and
Frances Lee-Edwards Fund ◀ NEW!**

The Elliott Family Fund ◀ NEW!

Embracing Women Fund ◀ NEW!

Barbara and Dave Erickson Fund (2004)

Chad Erickson Memorial Fund (2003)

Chad Erickson Memorial Park Fund (2011)

Erickson Sisters' Fund (2004)

Fowler and Hammer Fund (2005)

Barbara and Donald Frank Family Fund (1995)

Maureen and Robert Freedland Community Fund for Studies of the Shoah (Holocaust) (2014)

Maureen Freedland Social and Environmental Justice Fund (2016)

Ellen and Henry Funk Family Fund (2006)

Fred and Mary Ann Funk Family Fund (2006)

Garrity-Gokey Fund (2017)

Graw Family Fund (2018)

Guentner-Froegel Family Fund (2002)

James D. and Janice M. Hanesworth Fund (2007)

Harrington Fund (1998)

James and Ellen Heinecke Fund (2003)

Nancy Fulkerson Hill and Edwin L. Hill Fund (2016)

Hutson Family Fund (2002)

JARD Fund (1993)

Kerbaugh Family Fund (2016)

Carl Koch and Joyce Heil Fund (2012)



FUNDHOLDER SPOTLIGHT: Shelterbelt Fund

Gabe & Annie Berendes

Gabe and Annie Berendes are passionate, inspiring young philanthropists who are actively engaged in the local community. Gabe grew up in La Crosse and Annie in Dubuque, Iowa, and both credit their parents for shaping their philanthropic views by encouraging them to use their time, talent, and treasure for the benefit of others.

Annie's work at the Dubuque Community Foundation in the grants arena and assistance creating their "youth philanthropy" model gave her keen insight into how foundations work and planted the seed for her vision of long-range, impactful philanthropy.

Gabe and Annie met in college and studied abroad together for a short time in China. After graduation, they traveled to Chile as volunteers from a local nonprofit. They married in 2007 and

settled in La Crosse to start a family. Today, Gabe is a family medicine doctor at Mayo Clinic Health System, and Annie is completing her master's degree in public health.

Gabe and Annie are inspiring for their forethought and long-term contributions to the community they call home. They created the Shelterbelt Fund in 2017. A "shelterbelt" is a line of trees or shrubs planted to protect an area, like a farm field, from strong winds and the erosion they cause. The name of their fund is a metaphor for how generosity can help protect our community from harm and reflects their love of the outdoors.

Both Gabe and Annie, along with their two sons, Eddie and Benet, enjoy connecting with nature, especially mountain biking on top of the bluffs or exploring the boundary waters of the Mississippi.

They believe that nature should be accessible and available to all. A long-term vision of the Berendeses is to preserve and restore our natural environment and engage children to connect with the wonders of the wild.

Having started a fund before they turned 40, they will be able to watch the fund grow under the foundation's stewardship, even as they continue to give to their favorite local nonprofits. When their sons are older, Gabe and Annie plan to encourage them to participate in family discussions on how best to utilize their charitable contributions, thereby cultivating the next generation of community-minded philanthropists to generate their own vision of the future.

Joseph W. Kotnour Family Fund (2001)

Roy E. and Lillian Hope Kumm Fund (1986)

La Crosse Knights of Columbus Charity Fund (2012)

Sondra and Roger LeGrand Family Fund (2008)

Warren and Denise Loveland Family Fund (2008)

Kathy and Jack Lucey Family Fund for Alzheimer's (2018)

Magerus-McKinney Fund (2002)

Todd and Deb Mahr Family Fund (2004)

Bob and Jean Marck Family Fund (2004)

Richard H. Masrud Memorial Fund (2018)

Amie L. Mathy Fund (1987)

Charles F. Mathy Family Fund (2010)

Charles F. Mathy Fund (2006)

Sandra and Richard McCormick Citizen Diplomacy Fund (2012)

Donald and Audrey Medinger Family Fund (1998)

Tom and Ann Monson Family Fund (2005)

David R. Morrison Family Fund (2013)

Will and Charlie Nordeen "May the Force Be With You" Fund (2015)

Paqué Family Fund (2007)

Susan M. Quillin Fund (2018)

Richard T. Record Fund (2011)

Brian and Karen Rude Family Fund (2000)

Schilling Family Fund (2009)

Schloegel Family Fund for Kids (2018)

George and Virginia Schneider Family Fund (1994)

Kurt and Julie Schroeder Family Fund (2015)

Jack and Marti Schwem Fund (1999)

Morris A. & Roberta Anne Severson Fund (2014)

Shelterbelt Fund (2017)

Roland & Janeane Solberg Family Fund (2012)

Stansfield Family Fund (2013)

Strong Girls Strong Women Fund (2017)

Bradley and Lynn Sturm Family Fund (2008)

Sullivan Fund (2002)

Sundet Family Fund (2006)

Carol and Duane Taebel Family Fund (2006)

Steven P. and Suzanne R. Tanke Family Fund (2007)

Cheryl and Cindy Vieth Fund (2009)

Fred and Deb Wakeen Fund (2013)

Stephen and Katherine Webster Fund (2016)

R and S Weiser Family Fund ◀ NEW!

DESIGNATED FUNDS

A fund where the donor selects one or more nonprofits as the perpetual recipient of the fund's annual distributions. Designated funds are commonly established through estate planning to allow the donor to continue annual support to favorite charities beyond their lifetime.



\$296,768 in
Designated Grants
Dispersed in 2019

Ella F. Ambrosius Fund (1975)

Jean Gitz Bassett First Presbyterian Church
of La Crosse Fund ◀ **NEW!**

Steven and Julianna Blanchar Kindergarten
Trip Fund (2002)

Heidi and Scott Blanke Scholarship (2010)

Dr. Archie and Rosemary Britt Family
Fund (2013)

Margaret Forseth Burgess Music Fund (2013)

Kathryn, Olaus and Dena Cappelen
Fund (2007)

William S. Case Scholarship (1969)

M. Elizabeth Cason Fund (2011)

CMG Women's Fund (1992)

Ralph F. Cowgill and Winnie Rhea Wroten
Cowgill Family Fund ◀ **NEW!**

Ruth M. Dalton, MD Fund (2007)

Ruth M. Dalton, MD Juliette Low
Scholarship (2007)

Jean L. Foss-Norene A Smith Fund-WF (2011)

Maureen and Robert Freedland-LPEF Fund for
Studies of the Shoah (2007)

Ernest and Olive Gershon Fund (1991)

The Glendenning Family Fund (1995)

James Gokey Endowment Fund a.k.a Jim's
Grocery Bag (1998)

Gertrude Salzer Gordon Jazz in the Park
Fund (1997)

Gertrude and Donald "Sandy" Gordon Jazz
Scholarship (1998)

Dr. Gunnar and Mary Baldwin Gundersen
Memorial Fund (2007)

Rev. Ronald and Merle Gustafson Fund (2003)

Scott Henke Memorial Fund for the Care and
Shelter of Animals (2016)

Nancy Fulkerson Hill and Edwin L. Hill
Designated Fund (2016)

Wayne J. Hood Fund (1982)

Harold L. Isenman Fund (1981)

Jim's Grocery Bag – Schroeder Fund (2014)

Roch Kendrick Memorial Fund (2009)

Dale Kendrick Scholarship for Studio Art in
Painting (2003)

Tom and Trudy Kennedy Endowment Fund
a.k.a Tom's Grocery Bag (2013)

Kids for Kids Fund – LPEF (2008)

Maureen L. Kinney Fund (2016)

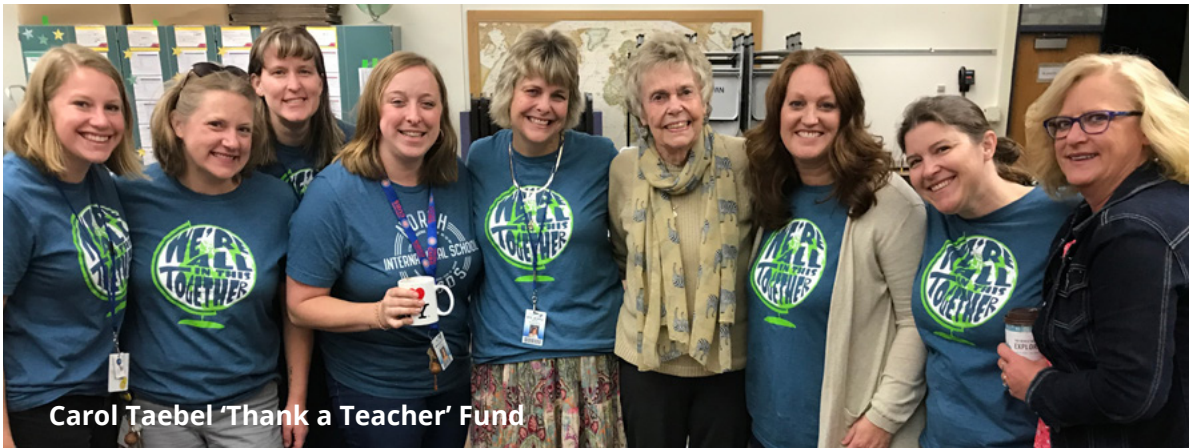
Inez and Nick Konas Memorial
Scholarship (2017)

Jason David Koppelman Scholarship
Fund (1990)

La Crosse Public Elementary School Field
Trip Fund (2013)

Gretchen Guernsey Leigh Fund (2007)

Betty Levinstein Fund-WF (2008)



Carol Taebel 'Thank a Teacher' Fund

Pictured: Carol Taebel with teachers at Northwoods Elementary School on Thank a Teacher Day

The Jacob Christian Lillejord Memorial Fund
a.k.a. Jacob's Ladder (2008)

Logan Math and Computer Science Scholarship Fund (2002)

Marie Louise Lokken Fund (2007)

Lommen Boys & Girls Club Scholarship (2000)

Milo and Beverly Mayer Mach Family
Fund (2006)

Mitchell-Kruck Scholarship (2007)

Dr. David L. and Sacia B. Morris Family
Fund (2008)

Don Olson Hospitality Scholarship (2004)

William C. Jr. & Scott Pickett Memorial Fund (2012)

Father Christopher Pratt Memorial Fund (1987)

Robert and Ruth Pribek Memorial Scholarship (2017)

Connie Repnik Memorial Fund (2006)

Carrol J Riley-DeGier Fund (2018)

James Rothwell Caregiver Fund ◀ NEW!

Joan and Paul Schoenfeld Fund – WF (2008)

Tom and Judy Sleik Family Fund (2013)

St. Paul's Evangelical Lutheran Church of Onalaska Endowment
Fund (2002)

St. Paul's Lutheran Church of La Crosse Legacy Fund ◀ NEW!

Pamela and Richard Strauss Fund – WF (2008)

Carol Taebel "Thank a Teacher" Fund (2018)

Duane and Carol Taebel Fund (2007)

Bernadette Teff Family Fund (2007)

Chester and Veronica Ware Fund (1995)

Donald P. Weber Veteran Scholarship Fund (2017)

Harry L. and Charlotte L. Woods Family Fund (1990)

Roberta Zurn Fund (2005)



Photo: Anita Taylor Doering

DESIGNATED FUND SPOTLIGHT: St. Paul's Lutheran Church of La Crosse Legacy Fund

After serving the La Crosse community for nearly 150 years, St. Paul's Lutheran Church had to make the difficult decision to dissolve in August 2019. The St. Paul's Lutheran Church of La Crosse Legacy Fund was established later that year with the proceeds from the sale of the church's building at 420 West Avenue in La Crosse.

The fund is intended to honor the incredible legacy of the church and its thousands of congregation members whose families — many that spanned multiple generations — celebrated marriages, baptisms, said goodbye to loved ones at funerals, and found other comfort in the church.

Pastor P. Asbjornsen became St. Paul's first official pastor in 1871 and grew the church to a 49-member congregation during his three years of service. All services were conducted in Norwegian until 1915. It wasn't until 1920 that English services became the norm, with a Norwegian service still offered the last Sunday of every month for several more decades. Many different pastors and six church locations served the congregation of St. Paul's Lutheran Church in La Crosse throughout its 148 years.

The fund will provide perpetual annual support to six organizations in the region who continue to serve local individuals through programs aligned with the Lutheran faith. The fund will live on forever at LCF in memory of the church's good works.

FIELD OF INTEREST FUNDS

These funds enable people to pool charitable gifts into one fund that addresses a specific purpose or area of interest. The foundation's board of directors awards grants to qualified organizations making a difference in that interest area through a competitive grantmaking process.



\$514,167 in
Field of Interest Grants
Awarded in 2019

Jean Gitz Bassett Fund (2006)
Roland Beranek Fund (2013)
Coulee Region White Cane Club (2011)
Howard Dahl Fund (1989)
The Elizabeth Fund for Literacy and Well-Being (2016)
Robert and Eleanor Franke Charitable Fund (2018)

Dr. Frank Furlano Family Fund (2002)
Norman L. Gillette, Sr. Family Fund (1992)
Global Awareness Fund (2006)
Alice O. Gordon and Viola M. Forshler Fund (1940)
Johns Flaherty & Collins-Michael Stoker Memorial Fund (2007)
June Kjome Justice and Peace Fund (2013)

La Crosse Bridge Builders Fund (1999)
Myrick Hixon EcoPark Fund (2014)
National Youth Sports Program Fund (1998)
Louis I. Reh fuss Fund (1981)
Rudy and Jean Schnurrer Fund (2009)
Mary Grace Sieber Fund (2006)
Corinne Zielke Fund (2000)

FIELD OF INTEREST FUND SPOTLIGHTS:



Global Awareness Fund

Est. 2006.

The Global Awareness Fund was initiated by Rita McGaughey and funded through many donors who shared Rita's vision. The fund supports opportunities for expanding awareness of our multicultural world by helping individuals to identify with people from outside the United States.

In 2019, the fund supported Global Initiatives Week, a World Arts through K/ Cultural Engagement (WAKE) event at Onalaska's Eagle Bluff Elementary, and Global Awareness Classroom grants for 11 schools in La Crosse County. Logan Middle School was awarded a grant to support a family night with local author Mai Chao. She led two workshop sessions at the family night where participants practiced telling culturally relevant global stories using verse poetry and art.

Pictured: Author Mai Chao and students share their art from the global storytelling workshop at a Logan Middle School family night

June Kjome Justice and Peace Fund

Est. 2013.

The June Kjome Justice and Peace Fund supports educational efforts that encourage community members to be informed about, and active in, issues of justice and peace at the local, national, and international levels.

"I love the name of the fund being out there, and that we get to help so many wonderful projects in the community. Although June has lost her sight, she's never lost her vision for social justice."

~ Susan Schmidt, Establishing Donor of the June Kjome Justice and Peace Fund

The June Kjome Justice and Peace Fund committee selected a storytelling, music, and art experience with Bill Miller at Northside Elementary in La Crosse as one of three recipients of grants in 2019. Bill Miller is a Grammy award-winning musician, songwriter, activist, painter, and Native flute player, originally hailing from La Crosse. The purpose of the project was to promote awareness of the contributions of Native American culture with students and their families. The photo to the right shows the completed painting students created with Miller's guidance. The cover photo of this impact report shows Miller and students painting it together.



Mary Grace Sieber Fund

Est. 2013.

Through a bequest, Mary Grace Sieber established a fund to ensure that young people living with physical, emotional, or mental disabilities have opportunities to lead independent lives through education programs, enrichment activities, and community events.

In 2019, the fund was used to support a new all-abilities Oodle swing at the YMCA's Miracle Field in Onalaska and adaptive exercise equipment at Central and Logan high schools.

Pictured: Mary Grace Sieber Fund committee members (Nancy Wettstein-Weaver, John Wettstein, Mary Mickelson, and Rachel Woods) commemorate the opening of the new Oodle swing at Miracle Field

SCHOLARSHIP FUNDS

A fund designed to provide financial support to deserving students. Donors establish the scholarship criteria, and the foundation's staff ensures awards are made in accordance with set guidelines.



154 students received LCF scholarships in 2019 totaling **\$226,600**

A.L.M. Scholarship Program Fund ◀ **NEW!**

American Association of University Women - La Crosse Branch Scholarship Fund (2013)
 Tammy and Allen Becker Family Pay It Forward Scholarship Fund (2018)
 Mary Jane Bice Fund (1985)
 Borton Construction Scholarship at Holmen (2008)
 Borton Construction Scholarship at Logan (2008)
 Borton Construction Scholarship at Luther (2008)
 Valerie Burman Art Plus Scholarship Fund (2016)
 James R. Conway Class of 1955 Logan High School Scholarship (2009)
 Coulee Region Engineering Scholarship Fund (1993)
 Peter DeCicco Scholarship (1992)
 Carol A. Dobrunz Memorial Scholarship (2014)
 Family Playhouse Theater Scholarship (2003)
 D. E. Field Scholarship (2007)

Kent Grimslid Memorial Music Scholarship for Onalaska High School (2014)
 Dorinda Hawk Music Scholarship Fund (2018)
 Neil P. Hengst Extra Effort Scholarship (2007)
 Ann Henke Scholarship Fund (2012)
 Josephine Hintgen Scholarship (1982)
 Hood-Weese-Miller Scholarship (2010)
 Jay F. Leinfelder, Jr. Memorial Scholarship (2015)
 Harold E. Lemke Fund (1991)
 Logan Opportunity Scholarship Fund (1992)
 Kaitlin Elizabeth Mahr Memorial Scholarship (2007)
 Nicholas Byrne Padesky Scholarship Fund (2015)
 Norma J. Valley Panka & William J. Panka Scholarship Fund (2012)
 Mark David Peacock Memorial Scholarship (2013)
 John and Adeline Rice Scholarship Fund (2002)
 Rockin Robyn Scholarship (2016)

James G. Sauer Scholarship (2011)
 Ralph Schultz Scholarship Fund (1996)
 John and Ruth Sherman Scholarship Fund (2008)
 Burton C. Smith Scholarship Fund (1983)
Tina Schwier Memorial Scholarship Fund ◀ **NEW!**
 Randy Smith Leadership Fund (2001)
Samuel D. and Charlet S. Sperbeck Scholarship Fund ◀ **NEW!**
 William E. Storandt Scholarship (2005)
 William P. and Lorna C. Vafeas Art Scholarship (1995)
 Nina Vanderzee Memorial Scholarship (2016)
 Clayton and Vivian Veum Scholarship (1995)
 David and Sandra Whiteley Scholarship (2007)
Richard Dick Wolfe Class of 1951 Logan High School Scholarship ◀ **NEW!**

SCHOLARSHIP FUND SPOTLIGHT: Tina Schwier Memorial Scholarship

Tina (Garves) Schwier passed away in May 2018 after a long battle with breast cancer. This fund was established as a tribute to her by Dale Walter, a friend and colleague with whom she worked for more than 15 years. Others have given to the fund in Tina's memory, including a generous gift from Bremer Bank where Tina worked.

Tina was born and raised in La Crosse and was living in Galesville when she passed. She is greatly missed by all, especially her husband Tony and their two sons Aidan and Ethan. Those who knew her best describe her as a loving wife and mother who always put others above herself and someone who would do anything to help anybody in need.

“One would be hard pressed to find a more positive and caring individual than Tina. She was adored by her family and business associates alike. We thought it would be fitting to provide a lasting memory of Tina through a scholarship fund managed by the La Crosse Community Foundation. With the organizational resources to administer the scholarship process, they were a perfect choice. We hope others will contribute to Tina's memory through the La Crosse Community Foundation and consider a similar arrangement for their loved ones.”

~ Dale Walter

To commemorate Tina's life and spirit, the fund will provide scholarships to area students pursuing a finance-related degree; more importantly, those selected must also have a demonstrated history of kindness and willingness to help others, just like Tina did.



AGENCY ENDOWMENT FUNDS

A type of designated fund established by a nonprofit organization for its own benefit. Each year the nonprofit can choose to take the set distribution amount or continue to grow the fund with its annual earnings to eventually become a sustainable revenue stream.



\$248,400
was distributed from
agency funds in 2019

- Bethany Lutheran Homes, Inc. Endowment (1991)
- Boys and Girls Clubs of La Crosse Fund (1985)
- Children's Museum of La Crosse Endowment (1998)
- Coulee Council on Addictions Endowment (2005)
- La Crosse Family & Children's Center Endowment (1990)
- Anita and Robert Funke Historical Society Fund (2004)
- Goodwill Industries of North Central Wisconsin Fund (1997)
- Sally A. Grimslid Memorial Fund for Northside Elementary (2005)
- La Crosse Area Family YMCA Fund (2001)
- La Crosse Chamber Chorale Fund (2002)
- La Crosse Concert Band Endowment (2004)
- La Crosse County 4-H Fund (2010)
- La Crosse County Historical Society Endowment (1990)
- La Crosse Public Education Foundation Endowment (1991)
- La Crosse Public Education Foundation — Richard Swantz Fund (2000)
- Amie L. Mathy Center for Recreation and Education Endowment (2005)
- Mental Health Coalition Endowment (2006)
- Onalaska Foundation for Educational Excellence, Inc. Fund (1998)
- Pettibone Park Commission Endowment (1992)
- Salvation Army, La Crosse WI Endowment (1992)
- Stars of Tomorrow Endowment (2006)
- United Fund for the Arts and Humanities Endowment Fund (1992)
- Wishland Pony Express Fund (1995)
- Women's Fund of Greater La Crosse (2016)



Photo: Phil S Addis

AGENCY FUND SPOTLIGHT:

La Crosse County Historical Society Endowment

La Crosse County Historical Society discovers, collects, preserves, and shares the history of La Crosse County. While the work of the organization today looks very different from when it first started in 1870 as the La Crosse County Pioneer Association, its commitment to enriching lives through engagement with the history of La Crosse County has been unwavering.

The La Crosse County Historical Society Endowment Fund was established in 1990 by bequests from Walter Sands, Clarence Smith, and Margaret Bott. Its distributions support the ongoing operations of the organization, which has grown to include archiving nearly 15,000 local artifacts, management of two museum locations with 3,000-plus annual visitors, and several annual events highlighting unique stories or periods of our local history.

“Our endowment funds at LCF ensure stability for the organization. You could say they ensure the region’s history for the future,” says Peggy Derrick, current executive director at the society. “Our board has selected LCF to administer our funds because we know they are trustworthy and are as committed to this community as we are.”

The society has since established two additional agency endowment funds at LCF, including the Anita and Robert Funke Historical Society Fund and a fund specifically for their Hixon House museum with gifts from Hixon family descendants.

OTHER FUNDS

- All Abilities Trane Park Fund ◀ **NEW!** — Special Project
- Community Giving Fund — Unrestricted
- Freedom Blues Fest Fund ◀ **NEW!** — Special Project
- LCF Administrative Fund — General Operating Reserve
- La Crosse Jazz Orchestra Fund ◀ **NEW!** — Fiscal Sponsorship
- La Crosse SOUP Fund (2018) — Fiscal Sponsorship
- Paul and Barb Leehey Impact Fund ◀ **NEW!** — Temporary Designated Fund
- PMJ Fund (2002) — Unrestricted
- Ron and Jane Rada Fund (2015) — Unrestricted
- Jack and Marti Schwem Impact Fund ◀ **NEW!** — Temporary Designated Fund
- Margery J. Stansfield Fund (2013) — Unrestricted

WHY CHOOSE

La Crosse Community Foundation?

You Receive Prompt, Personal Service

We can establish most funds in one brief meeting. We work to keep paperwork to a minimum and communicate in simple, direct terms.

Your Gift Will Be Used Wisely

Because we pool contributions, investment management and administrative costs are kept to a minimum, so contributions directly support the community.

Your Gift Will Address Emerging Needs

We take the driver’s seat to effect positive change by convening resources from private donors and community businesses and deploying a coordinated approach around significant threats to community wellness.

You Have Many Giving Options

We offer many ways to give and a variety of fund types that provide a highly personal approach to giving. Our staff works one-on-one with donors to make sure they achieve their charitable giving goals.

Your Gift Can Give Forever

Thanks to the power of endowment and time, funds can make grants every year in perpetuity and still grow over time to continually increase community impact year after year. Donors are associated with doing good in La Crosse County, forever.

LA CROSSE COMMUNITY FOUNDATION SPECIAL PROGRAMS

LCF is the proud fiscal sponsor of two unique groups in the area: La Crosse SOUP and La Crosse Jazz Orchestra. This arrangement helps both groups operate without having to incorporate as their own nonprofit organizations, as we can accept charitable gifts on their behalf.



La Crosse SOUP facilitates the crowdfunding of community-based projects during their quarterly microgranting dinners. Local residents and groups can submit ideas to SOUP that need funding and SOUP selects four to “pitch” at each event. Attendees pay \$5 for soup, bread, and a vote. The four groups selected to pitch each get four minutes to convince the audience to cast votes in their favor. The group with the most votes wins the money raised.

SOUP RAISED OVER \$9,586 IN 2019

The four winning 2019 pitches were:

theExchange received \$1,526 for shelving to help them better receive donations.

Central High School's **Indigenous Peoples Club** received \$1,322 for a keynote speaker.

Southside Moms United received \$1,938 to ensure racially diverse children have access to hair products and stylists.

Sleep in Heavenly Peace received \$2,539 to provide beds to children who otherwise would sleep on the floor.



Pictured: Southside Moms United, winner of SOUP at the Market, and Sleep in Heavenly Peace, winner of SOUP at Rotary Lights.



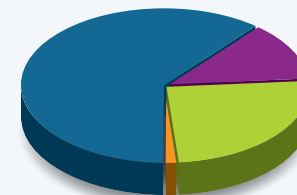
The La Crosse Jazz Orchestra is Western Wisconsin's premier big band. Founded in 1975, the nonprofit group is best known through its Jazz in the Park concert series in Riverside Park. The organization's mission is to promote, preserve, and forward the creation of jazz music through free, live performances available to all in our region.

“It’s so important that we keep jazz alive and well! I would recommend Jazz in the Park to anyone who loves hearing passionate musicians working together to make music swing!” said Steve March-Tormé, acclaimed jazz singer.

LA CROSSE JAZZ ORCHESTRA: 2019 Financial Report

Support & Revenue

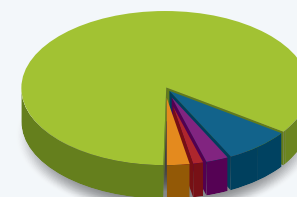
Establishing Gift: \$50,400	Individual Donors: \$10,475
Investment Earnings: \$820	Foundations & Grants: \$21,000



Total Support & Revenue: \$82,695

Expenses

Musician, Guest Artist & Director Compensation: \$27,541	Fiscal Sponsorship Fee: \$938
Printing & Mailing: \$2,563	Other Misc.: \$952
Riverside Park Band Shell Project Gift: \$500	



Total Expenses: \$32,494



Members of the Forever Society have solidified their intent to do good forever by including La Crosse Community Foundation in their will or other estate plans.

We invite all who wish to protect our beloved community's greatest assets to make a charitable decision today that will ensure support of your favorite charities forever.

Planned giving is easier than you think!

Did you know that planning your future now can help you secure the future of your family, friends, and the causes important to you?

Many believe estate planning is an expensive, long process, but often this assumption is inaccurate. Creating a plan is less about form and procedure and more about considering all the people and causes that are important to you. The reality is...

- Many assets like a retirement plan or life insurance can be transferred outside of your will by simply naming a person or organization as the beneficiary.
- It's possible for a well-written will to consist of just a few pages. In Wisconsin, an attorney isn't even required to draft a legally binding will.
- If you do not create a plan, the government will determine what happens to your assets — and that determination may not be in keeping with your personal goals. More of your hard-earned assets will likely go to the IRS.

"La Crosse Community Foundation has been a tremendous resource for my clients, helping many of them devise strategic giving plans during their lifetimes and developing flexible estate plans to ensure permanent legacies for their favorite causes. Working with LCF is a win-win-win: for me, for my clients, for the community we all love."

***~ Maureen Kinney
Attorney and LCF Fund Holder***



FOREVER SOCIETY MEMBER SPOTLIGHT:

Jean Gitz Bassett

When Jean Gitz Bassett passed away in 2018, she left part of her estate to La Crosse Community Foundation with directions to support her Jean Gitz Bassett Fund and create the new Jean Gitz Bassett First Presbyterian Church of La Crosse Fund. The first is a field of interest fund used in LCF's competitive grantmaking program to support projects that strengthen families. The latter is a designated fund established to forever support Jean's church.

Jean is well known for her contributions to philanthropy, community engagement, and pioneering the way for women in the field of broadcasting. Jean served on many local nonprofit boards, was one of the first women broadcast station owners/managers in the nation, was the second woman ever to receive the local Chamber of Commerce President's Award in 1988, and to top it all off, was crowned Mrs. Oktoberfest in 1989. A longtime friend of Jean's recalled that her home was filled with over 150 plaques and awards for her contributions to the community.

Loved for her get-it-done-right attitude and positivity, Jean gave energy and focus to those she served. In an interview in "The Road She Traveled," Jean said, "I do what needs to get done, and I help people in our community without wanting anything in return. To me, seeing people that I helped living a decent life is the best reward anyone can give me."

LCF is humbled and honored to be entrusted with her treasure; we will protect it and ensure it serves to continue her dedication to real impact in our community.

2020-2022 STRATEGIC PLAN

La Crosse Community Foundation was created to exist in perpetuity, so we strive to constantly evolve to remain relevant to our donors' interests and the changing needs of the communities we serve in La Crosse County. Our strategic planning practices with our board of directors guide us through these evolutions.

The board of directors approved this three-year plan in February 2020 after several months of work collecting

and analyzing feedback from our two target audiences: our donors and our grant recipients. This planning round also included an update to our mission statement and the creation of a vision statement and guiding principles to our work and serve as our "strategy screen" for determining whether any new strategy, partnership, service, or initiative is consistent with the foundation's core purpose.

MISSION CONNECTING PEOPLE, PASSION AND GIVING IN THE LA CROSSE AREA FOREVER

VISION THE CATALYST FOR A VIBRANT, GENEROUS, AND INCLUSIVE COMMUNITY

GUIDING PRINCIPLES



AT ALL TIMES WE STRIVE TO ADHERE TO THESE PRINCIPLES FOR OUR DONORS, NONPROFIT PARTNERS, AND THE COMMUNITY:

- We open our doors to everyone and anyone who aspires to build upon the contributions of the past and present to shape our county's shared future.
- We exist to amaze those we serve through nurturing lifelong relationships that span generations.
- We believe diverse voices, engagement, and participation are essential to building and sustaining thriving communities.
- We are flexible, responsive, open to innovative strategies, and able to take prompt action with ease.
- We believe in the transformative power of partnerships around shared passions and objectives.
- We are dedicated to being trusted stewards of our community's past and future assets.

STRATEGIC PLAN PRIORITY AREAS



PRIORITY AREA I: COMMUNITY IMPACT

Provide community leadership to enhance the quality of life in La Crosse County

AIM: The culture of philanthropy is alive and well in the La Crosse area because of our work. Individuals feel motivated to give to support nonprofit missions.

PRIORITY AREA II: SMART PHILANTHROPY

Build the foundation's assets to increase impact

AIM: LCF is recognized as the premier philanthropic institution in La Crosse County. Donors take pride in being a part of the foundation and its impact. Donors count on LCF to fulfill their philanthropic goals, feel appreciated, and continue to give.

PRIORITY AREA III: FIDUCIARY RESPONSIBILITY & STEWARDSHIP

Enhance the foundation's investment options and spending policy for our donors

AIM: LCF offers a comprehensive menu of fund types, investments, and spending options to meet the varied interests and goals of current and future donors.

PRIORITY AREA IV: LOCAL NONPROFIT SUCCESS

Invest in the strength and sustainability of our local nonprofits beyond grantmaking

AIM: The financial health and programmatic capabilities of local nonprofits is bolstered.

2019 FINANCIAL REPORT

Auditors: Johnson Block CPAs

Trustee and Investment Manager: Trust Point

WE PROTECT ALL CHARITABLE GIFTS BY PRIORITIZING STEWARDSHIP

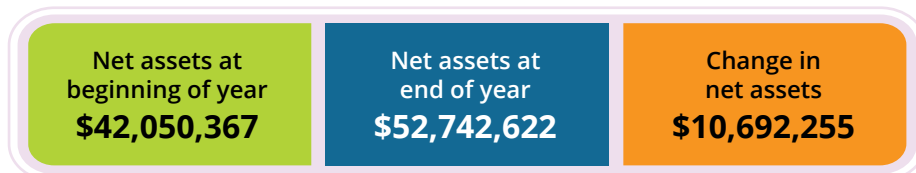
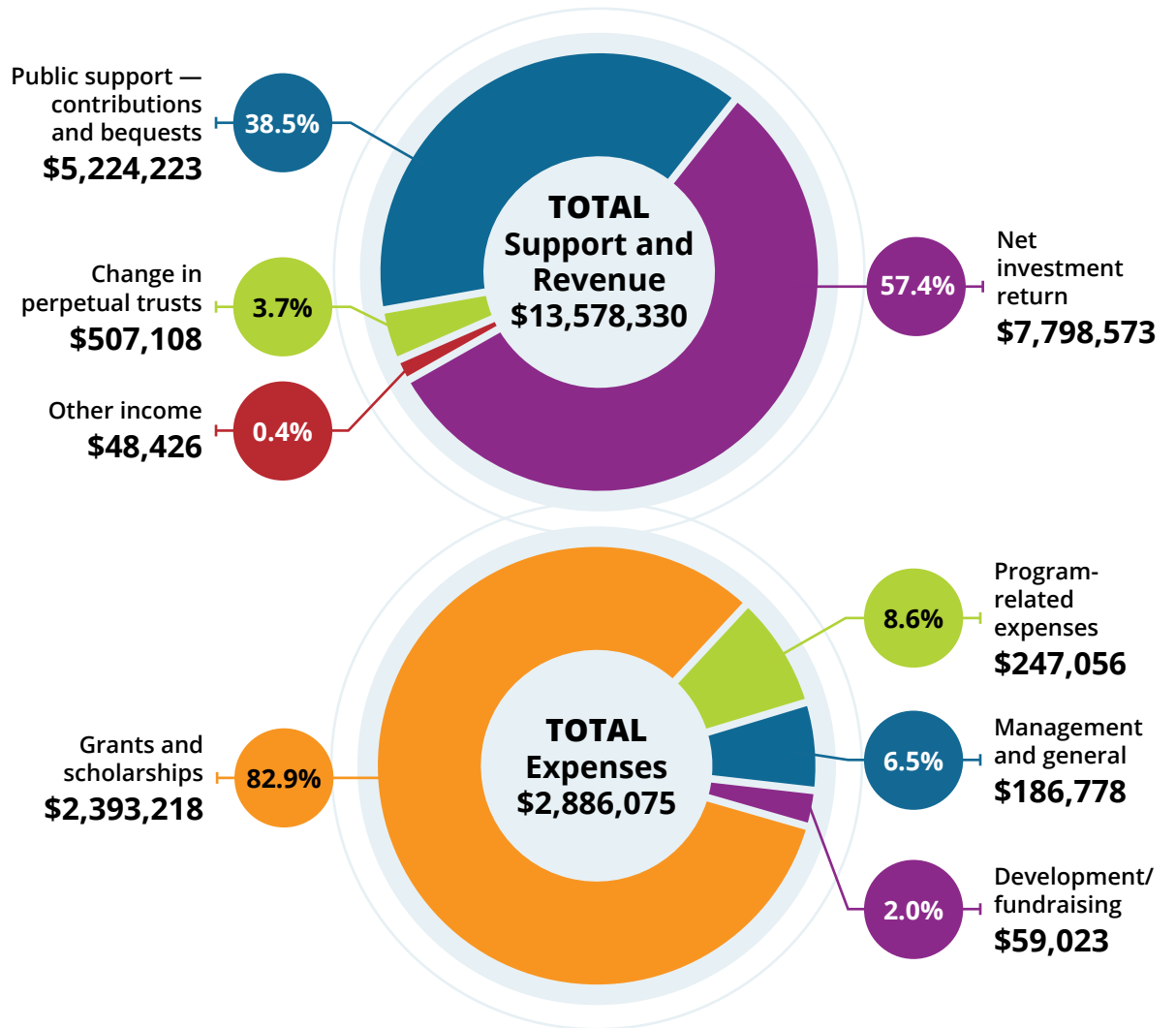
The board of directors bears the overall fiduciary responsibility for La Crosse Community Foundation. The board appoints and empowers a finance and investment committee comprised of individuals with extensive business and investment backgrounds for ongoing investment guidance, monitoring, and oversight. They strive to maximize investment income while following formal, yet flexible investment guidelines that incorporate prudent risk parameters, appropriate asset guidelines, and realistic return goals.

Our investment portfolio is managed by Trust Point. Representatives from Trust Point work with the finance and investment committee to continually review and update our investment policy to ensure it's responsive to current capital market conditions and the needs of the foundation. Information regarding the portfolio's performance is available upon request.

Find our complete 2019 donor list on our website at www.laxcommfoundation.com

LA CROSSE COMMUNITY FOUNDATION SUMMARY OF ACTIVITIES

FOR THE YEAR ENDED DECEMBER 31, 2019



*This report is a summarized financial statement. The complete 2019 audited financial statement and IRS Form 990 are available on our website or by calling the foundation.

La Crosse Community Foundation

STATEMENT OF FINANCIAL POSITION

DECEMBER 31, 2019

ASSETS

Cash and cash equivalents	\$ 305,667
Restricted cash	6,977
Investments	51,302,623
Leasehold improvements, fixtures, and equipment, net of accumulated depreciation of \$22,101	12,522
Contributions and bequests receivable	492,467
Other assets	932,967
Beneficial interest in perpetual trusts	<u>4,306,590</u>

TOTAL ASSETS **\$ 57,359,813**

LIABILITIES AND NET ASSETS

LIABILITIES

Payroll taxes payable	\$ 1,207
Security deposits payable	6,977
Grants payable	238,750
Agency endowment funds	<u>4,370,257</u>

TOTAL LIABILITIES **4,617,191**

NET ASSETS

Net assets without donor restrictions	
Operating and administrative funds	927,711
Community giving funds	7,814,002
Special projects and temporary funds	1,836,270
Field of interest funds	10,900,310
Donor designated funds	14,925,574
Donor advised funds	<u>11,541,216</u>
Total net assets without donor restrictions	47,945,083
Net assets with donor restrictions	<u>4,797,539</u>

TOTAL NET ASSETS **52,742,622**

TOTAL LIABILITIES AND NET ASSETS **\$ 57,359,813**



STEWARDSHIP YOUR PHILANTHROPY

By: Finance Director Erin Belby

In August of 2019, I enthusiastically joined La Crosse Community Foundation's team as finance director. I brought with me 15 years of experience working across the nonprofit sector — the last ten years primarily as an auditor and consultant to charitable organizations in the La Crosse area. In my new role, I'm diving into our foundation's policies and procedures and gaining a better understanding of the role community foundations play in our world. In 2020, we'll review several of our processes and policies to make sure they are aligned to support our mission and strategic vision while keeping our foundation relevant for 21st century philanthropists.

Working with organizations in the area, I've learned so much about the vital role each plays in our community. These organizations are often the place where big ideas and incredible need meet modest budgets and sometimes challenging compliance requirements. Finding solutions that fit and are sustainable can be tricky. In 2020, I hope to leverage my prior professional experience to be a resource to our local nonprofits and their unique finance and accounting challenges.

From a market perspective, at the end of 2019 we continued to linger in a period of record-breaking economic expansion. I'll be working with the finance and investment committee in partnership with our portfolio managers at Trust Point to ensure our funds can weather market uncertainties while focusing on long-term strategies appropriate for perpetual funds.

It's been amazing getting to know getting to know Jamie, Katie, Sherry, and the foundation's board, committee members, and donors. I'm truly grateful for the opportunity to be a part of this "dream team." I look forward to meeting and working more with the many donors and organizations that make our community great!

CONTACT ERIN BELBY

(608) 782-3223 ext. 24

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LA CROSSE
COMMUNITY
FOUNDATION

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La Crosse, WI 54601

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PROTECTING OUR COMMUNITY'S GREATEST ASSETS

La Crosse Community Foundation was founded in 1930, when a streetcar ran down Main Street and the Cass Street bridge was only a plan. Although La Crosse County has changed dramatically in the 89 years since, one constant holds strong: our commitment to protecting and growing the financial resources necessary to support the many local charitable organizations that continue to make our community safe, vibrant, and beautiful.

