

APPLETON ROTARY FOUNDATION
ANNUAL REPORT TO THE MEMBERSHIP 2010-2011

Today, I am reporting on last year's activities of the Appleton Rotary Foundation which are supported by your charitable contributions.

Before I do that, let me introduce the 2011/2012 Foundation Officers, Investment and Grants Review Committee members:

President	Dave Rothmann
Vice President	Jeff Werner
Secretary	Matt Rehbein
Treasurer	Nancy Johnshoy
Club Representatives	
President	Dan Nisler
Vice-President	Dawn Doberstein
Grants Review Committee Chair	Curt Detjen
Grants Review Committee Members	Ron Altenburg
	Caroline Lasecki
	Kevin Loomans
	JoEllen Wollangk
Investment Committee Chair	Jay Drzewiecki
Investment Committee Members	Bill Hodgkiss
	Nancy Johnshoy
	Dave Rothmann
	Jeff Riester
	Walt Rugland
	Paul Trigg
	Tom Zwicker

In terms of performance, the July 1, 2010 Foundation balance was \$969,321.49. The ending balance as of June 30, 2011 was \$1,121,238.73. The overall rate of return was 21.74%. During the course of the year, contributions of \$11,395 were made to the Foundation's funds. The committees who oversee those funds were able to award grants totaling \$50,484.

The Arts Scholarship Fund supports individuals who seek educational experiences in his/her art field. The Art Scholarship Committee awarded scholarships in the amount of \$2,304 to:

• Ryan Korb	Attend "Cuba in Chicago" workshop in Oak Park, IL	\$ 300.00
• David Bliven	Attend "The Classic Figure and Portrait: A Modern Approach" workshop	\$ 250.00
• Anne Paterson	Attend a writing class at The Clearing Folk School	\$ 364.50
• Mardelle Mathewson	Attend one class at The Clearing Folk School	\$ 364.50
• Karen Kurka Jensen	Attend "Sumi-e: Painting from the Heart" workshop	\$ 475.00
• Michele Missner	Attend "Experience the Wonders of Waterbased Mediums" class	\$ 550.00

The Paul and Elaine Groth World Community Service Fund provides financial support for international projects endorsed by the World Service Committee who approved a \$3,157 grant to reconstruct a school in Pignon, Haiti.

The Helen Thom Roemer Fund provides support to projects that serve the needs of children with limited physical abilities and cognitive deficits in the Appleton area. Last year, the Children with Disabilities Committee approved the following requests, totaling \$23,473:

• Cerebral Palsy of Mideast Wisconsin	Camp Sandy Wheels	\$ 2,000.00
• Special Needs Learning for Life	Life Skills Training	\$ 1,723.00
• Appleton YMCA	Camp Hope	\$ 1,500.00
• Easter Seals HelpLine	Easter Seals Equipment Grants	\$ 3,000.00
• Fox Valley Sibling Support Network	Santa Celebration 2010	\$ 2,000.00
• CESA 6 Nicolet School	Rewards for Good Behavior Program	\$ 250.00
• The ARC Fox Cities	Camp Program Funding	\$ 2,500.00
• Appleton Area School District	Keys to Success Program	\$ 6,000.00
• BEAMING, Inc.	EQUAL Therapeutic Riding	\$ 2,000.00
• The Miracle League of the Fox Cities	Construction of Facilities	\$ 2,500.00

The Community Service Fund was established to direct charitable donations to address local community needs. The Community Service Committee approved a \$3,000 grant to NAMI Fox Valley for education and support programs for adults and young adults.

Four thousand seven hundred seventy five dollars (\$4,775) were transferred to Rotary International from the Charles Heeter Fund for Paul Harris Fellowships for the individuals who received the Charles and Adele Heeter Outstanding Community Leadership Award this past year.

The Scholarship Fund was created to award scholarships of \$5,000 paid over a three-year period to seniors from the five Appleton high schools. The fund also contributes to the U.W. Fox Valley and Fox Valley Technical College Foundations for non-traditional student scholarships. This year, seven students received a total of \$10,002 in scholarships and the two school foundations received \$1,886.50 each. The total distributed by the Scholarships Committee was \$13,775.

The Foundation also maintains pass-through checking accounts. These accounts insure that your donation is tax deductible and that the beneficiaries have ready access to that cash. Nineteen thousand one hundred ninety nine dollars and 20 cents (\$19,199.20) were distributed to cover SAMP storage fees and payment for two shipments to Pakistan and one shipment to Jamaica. Thirteen hundred dollars (\$1,300) were distributed to the Fox Cities Rotary Multicultural Center. The Appleton Rotary Foundation checking account disbursed \$1,000 to support the Washington Square plantings (support from an anonymous donor) and \$10,995 to support PolioPlus and the village immunization from the 2010 Rotary Shines event. The \$5,157 difference in the distribution amount is due to holding the \$3,157 Groth Fund grant and a \$2,000 donation from IndUS until the arrangements were made in Haiti.

We started the process to change the Appleton Rotary Foundation from a private foundation to a public charity. The primary reasons for the change were to grow our Foundation with financial support from the public and to take advantage of higher tax deductible limits.

This year we plan to create term limits for the President and Vice President positions. We also plan to create a Legacy Fund.

In closing, I would again like to thank you for your generous donations to our Foundation, and thanks to the committees I just mentioned who do a fantastic job of managing their respective grant request processes.

Respectfully submitted,

David A. Rothmann
President
Appleton Rotary Foundation