



COMMUNITY FOUNDATION  
OF CENTRAL WISCONSIN



Portage



2023  
Annual Report

Waushara





## Vision

Portage and Waushara Counties are thriving communities with a strong culture of philanthropy.

## Mission

We inspire charitable giving by connecting people and resources to enhance Central Wisconsin now and for future generations.

## Values

- Compassion
- Connection
- Commitment



# Highlights

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Dear friends,

As we reflect on the past year, it's evident that our journey is not just about the milestones we've achieved but the deep connections and commitments that have brought us here. This year, we've seen remarkable expressions of generosity and compassion. The collaborative efforts of community members, the tireless dedication of nonprofits, and the altruism of our donors have all played a crucial role in uplifting the lives of those in Portage and Waushara Counties. We've been implementing a new strategic framework that promises to shape a brighter, more inclusive future for our work and the community we serve.

Our annual report celebrates these collective achievements. It highlights the progress we've made together and the obstacles we've faced together. As we acknowledge another year of dedicated service, we are deeply thankful for your continued trust and support. It's your belief in our mission that fuels our commitment to enrich lives and create lasting legacies.

Together, we are the Community Foundation of Central Wisconsin. As we step into another year of opportunities and growth, we warmly invite you to be a part of our ongoing efforts to positively shape the community we cherish.

Katie Young  
President

Jenny Riggerbach  
Chief Executive Director

# Highlights by the Numbers

2023

Your generous support has led to remarkable achievements this year.

**\$1.7 million** awarded to **199 organizations** in 2023, including:

**\$329,080**

through the Community Grants Program  
to Portage & Waushara County  
organizations

**300**

funds managed by the  
Community Foundation

**\$50,000**

to the Major Project Recipient

**\$5.7 million**

in donations received in 2023



Our shared impact since the Foundation began:

Over **\$17.2 million**  
in total grants given out thanks to donors like you



**Right:** One of the many students who benefited from the generosity of the Mary Hesch Pay It Forward Fund.

**Below:** Mary Hesch, creator of the Pay it Forward Fund, joyfully playing music.



## Donor Advised Fund Spotlight

*"I thought of creating my own foundation, but in my research, I found it to be a lot of work. Meanwhile, the Community Foundation website was informative and easy to navigate. I reached out to Jenny with an email on a Sunday. She replied first thing Monday morning. We met the very next day on Tuesday. That is impressive service, dedication, and commitment!"*

— Mary Hesch

This year, The Mary Hesch Pay It Forward Fund donated \$10,000 to the Stevens Point Area Public School District (SPAPSD) Music Program.

"We would love to acquire more instruments for the district to be able to rent affordably to families with financial hardship. This incredibly generous donation will go a long way to help our students realize their musical talents, thereby elevating their learning in the broader school community," shared Kurt Van Tiem, SPAPSD.

This commitment to giving back is a family tradition, as Mary remembers her father instilling the practice of community reinvestment among her siblings. The Mary Hesch Pay It Forward Fund continues the legacy her father and family started.



# Why Work with the Community Foundation



**Making a difference in our community is easier than you might think.** At the Community Foundation, we offer various straightforward and impactful ways for you to contribute, each tailored to your unique giving preferences and goals.

## **Donor Advised Funds: Tailor Your Philanthropy**

Choose this flexible option to steer your philanthropy, selecting causes to support with guidance from our experienced team. Get started with the Community Foundation as your strategic partner and resource.

## **Designated Funds: Realize your Philanthropic Goals**

Set up a fund that aligns with your long-term vision for community improvement and personal giving objectives. Connect with us to create a fund that mirrors your philanthropic aspirations.

## **Existing Funds: Support a Cause You Care About**

Contribute to one of our existing funds, each dedicated to a specific community need, organization, or cause. Be a part of something bigger at any contribution level. Explore our range of funds and choose where you'd like to make an impact.

## **The Keystone Fund: Powering Our Shared Mission**

Your contribution to the Keystone Fund is a vital component of the Community Foundation's operations. It helps maintain the momentum of our essential programs, ensuring that we can effectively serve and support our community for generations to come.

## **Leave a Legacy: Preserve Your Impact**

Make a lasting mark on the community through a legacy fund. A bequest in your will or estate plan will continue to benefit the issues important to you for years to come.

**Giving to the Community Foundation helps support the work of organizations like the North Central Conservancy Trust.**



*Every gift, whether one-time or part of a lifelong commitment, is significant. Let's explore the most fitting way for you to uplift our community. Reach out to start your philanthropic journey and forge a substantial impact in Central Wisconsin.*





# Protecting our Treasures

## Organizational Endowment Funds at Work

*Our Organizational Endowment Funds are designed to meet the ongoing needs of our nonprofits and community treasures, ensuring their impact and stability for future generations.*

**We invite you to contribute to our Organizational Endowment Funds.**

### Keystone Fund

The Keystone Endowment Fund was established by the Worth family to support the Community Foundation's long-term future.



*“Because of the endowment and the money it provides, we can keep our services going with donations, filling in where our budget falls short.”*

*— Tasha Beastman, Executive Director of Meals on Wheels of Stevens Point*

- Aldo Leopold Audubon Society Endowment Fund
- Annette & Dale Schuh Riverfront Arts Center Fund
- Big Brothers Big Sisters of Central Wisconsin Inc. Endowment Fund
- Boston School Forest Fund
- Boys & Girls Club of Portage County Endowment Fund
- Camp Hope Endowment Fund
- CAP Services Endowment Fund
- Central Rivers Farmshed Endowment Fund
- CREATE Portage County Endowment Fund
- Engine 2713 Fund
- Friends of Schmeckle Reserve Endowment Fund
- Green Circle Trail Endowment Fund
- Humane Society of Portage County Endowment Fund
- Iola Winter Sports Club Designated Fund
- JusticeWorks Endowment Fund
- Kids Are Special Here Playground Endowment Fund
- Mary J. Podoll SPASH Band Fund
- Meals on Wheels of Stevens Point Fund
- Midwest Renewable Energy Association Endowment Fund
- North Central Conservancy Trust, Inc. Endowment Fund
- Operation Bootstrap Endowment Fund
- Pacelli Catholic Schools Endowment Fund
- Portage County Historical Society Funds
- Portage County Literacy Council Endowment Fund
- Portage County Public Library Founders Fund
- Stevens Point City Band Fund
- St. Martin's Church Maintenance Fund
- St. Paul's United Methodist Church Angel Endowment Fund
- Waushara County Food Pantry Endowment Fund
- Wild Rose Patterson Memorial Library Fund
- Wisconsin Land Information Association Foundation Fund
- Wisconsin/Nicaragua Partners of the Americas Fund
- Wisconsin Woodland Owners Association Fund
- WWI Veteran's Memorial Fund

## Community Leadership

# Serving and Strengthening Our Community Together

*Central to our mission is a profound dedication to serving and supporting key areas vital to our community's future. Here are three areas where investing our resources is creating positive ripple effects.*

Community Foundation CEO, Jenny Rigenbach, and Arts & Culture Mission Fund founder, Bill Schierl, energize the Levitt AMP Concert crowd with arts and culture trivia.



### **Collaborative Impact: Community Dialogues and Partnerships**

Essential to the Community Foundation of Central Wisconsin's mission is our commitment to nurture a more connected community. We achieve this by providing platforms for meaningful dialogue, partnering with key organizations, and supporting the emergence of new leaders and initiatives. Our Community Lunch Hour series offers monthly conversations where we gather to talk about the issues affecting our region and hear from local leaders. We also lent our support to initiatives like the LIFE Report, a key tool overseen by United Way of Portage County, providing a thorough, data-based understanding of our community's needs. Additionally, our collaboration extends to

supporting Mid-State Technical College's Nonprofit Leadership Institute. We saw an important opportunity to develop current and future nonprofit leaders, thereby driving sustainable and impactful outcomes across our community.

### **Shaping Our Tomorrow: A Strategic Framework for Enhanced Philanthropy**

In our 2023 strategic retreat, we sharpened our future vision. We are focused on fostering measurable change as an inclusive partner, enhancing impact through donor collaboration, and building organization excellence. We are active partners with the donors who are leading efforts to enhance the future prosperity of Portage and Waushara counties. Rooted in our values of compassion, connection, and commitment, our strategy equips us to tackle current

and future challenges, promoting continual community growth and well-being.

### **Keystone Award: Honoring Community Change Makers**

In 2022, the Community Foundation launched an annual award inspired by the people who established the Keystone Endowment Fund at the Community Foundation. The Keystone Award, initiated and bestowed by the Community Foundation, is a beacon of philanthropic excellence. While it is true that financial resources are important to our growth and impact, it is special people who give their time, talents, and treasures that make real and lasting change. This award sheds light on inspiring figures that help encourage a culture of generosity and involvement.





## Dave Williams

2023 Keystone Award Recipient

Dave Williams is a prime example of community leadership and inspiration. Community Foundation Board Member Nancy McCaskey shares, “Dave Williams, with his long-standing community involvement, naturally took on responsibility of the Hartford Fund. This established the first Waushara County (grantmaking) Fund and sparked the growth of philanthropy in the area. Dave’s generous donations of time and talent have significantly improved the lives of countless people in the area.” During his 15 years as a board member, Dave worked with the Wild Rose School District to help grow over \$1 million in scholarship endowments for students. We are grateful to recognize Dave’s dedication with the Keystone Award.

**\$284,495**

in scholarships awarded in 2023

# Investing in Dreams

Expanding Opportunities through Scholarships

**207**  
recipients  
with awards  
ranging from  
\$500 to  
\$40,000

## The Say Gay Scholarship Scholarship Spotlight

The Say Gay Scholarship, established by Rachel Boaz and Emily Lombard, offers financial aid and a vital message of belonging to LGBTQ+ youth. In working with the Community Foundation, they found, “It was incredible to see systems in place for student outreach, allowing us to focus on fundraising and selection. We felt confident that students would be aware of this scholarship and feel seen.”

Boaz shares, “The whole point of this wasn’t about the money. It is so every kid in a small-town America can see that they are loved for who they are. When you think about the suicide rates amongst LGBTQ+ kids and teens, it’s atrocious and heartbreaking. To me, it was always just about them, seeing that they’re loved.”



# Create Your Enduring Legacy

The **Heinz Living Legacy Circle** recognizes donors who have made estate planning arrangements for charitable giving beyond their lifetime. We are honored to fulfill their legacies.

Barbara Samsel Hermans  
Bill & Carol Rogacheski  
Chris & Mary Sadler  
Cindi John  
Cheri & Craig (Smitty) Smith  
Debbie & Bruce  
Gail & Rick Viergutz  
Gary & Amy Oudenhoven  
Harlow & Joanne Johnson  
Jack & Cheryl Brooks  
James E. Godfrey

Jan & Kathy Hermann  
Jean Pyfer  
James G. Canales  
John & Vicki Jenks  
Joseph Browan  
Kevin & Jennifer Pulvermacher  
Lynn Domaszek  
Lloyd & Lois Cole  
Lorna Fifield  
Maggi Liebl  
Marg Coker-Nelson

Marge Wyszynski  
Mary Ann Laszewski  
Michael & Sara Bilbrey  
Nancy N. Moore  
Paul & Debbie Callahan  
Phyllis Cristie  
Robert & Mary Berard  
Robert & Mary Taylor  
Stanley G. & Marlies I. Acker  
Susan M. Konopacky

Suzanne Kinyon  
Terry & Karla Rothmann  
Thomas F. Miller  
Thomas & Katherine Davies  
Thomas (Tom) & Patricia (Patty) Dreier  
Tori Jennings  
William Schierl & Sarena Melotte  
Additional anonymous living legacies

## In Memoriam

Judy Albertson  
Arthur E. Heinz  
Joe DeBauche  
Donald Collier  
Harriet Fulton  
Helen Godfrey  
Geraldine E. Hartford  
Hope H. Niedling  
Irene E. Kubisiak

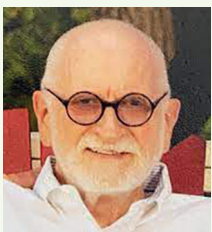
Joan C. Joerns  
Edie Kraus  
Margaret Myhra  
Barbara McDonald  
Nancy H. Croisant  
Ruth Salzmann  
Barbara Schreiber  
William Bruce  
Carl Wohlbier

Mark Ilten  
Mary Kocha  
Grace & Paul Borham  
Norman Anderson  
Robert Emmons  
Daniel Howley  
E. Ann Buck  
Ardis Haviland  
Kathleen Meshak

Bernice Brussat  
Russell Phillips  
Kathryn Podoll  
Elizabeth Davies  
Fern Johnson  
Natalie Hartford  
George Rogers  
Mary Loomans  
Dr. Robert Cooper

Create a lasting impact by leaving a legacy gift to our community's future.

## Honoring the Legacy: Remembering Dr. Robert Cooper and Mark Ilten



**Dr. Robert Cooper**, a dedicated community advocate and owner of Cooper Dental, devoted his time and energy to numerous local initiatives. As an early board member of the Community Foundation of Central Wisconsin,

Bob's 15-year volunteer tenure significantly shaped the organization. In 2019, he and Nancy founded the Dr. Robert and Nancy Cooper Fund, aimed at bolstering the Foundation's Community Grants process. His foresight has been instrumental in the Foundation's growth and impact.



**Mark Ilten's** impact as an attorney touched many lives. Beyond professional commitments, his community spirit was evident in his leadership as a Community Foundation board and emeritus board member (2000-2009) and

as board president (2004-2006). He established the Stevens Point City Band Endowment Fund, and among his lasting legacies, Mark's introductions to key individuals enabled the growth of our Community Grants Program, a testament to his influence and generosity.





The Women's Fund of Portage County

# Re-launched, Refreshed, Refocused

**T**he Women's Fund of Portage County, rejuvenated by a strategic refresh in 2023, is now poised to more effectively champion vital women's issues. Its powerful new mission states:

**We champion issues important to women and mobilize all women to give, engage, connect, and support one another.**

In response to ongoing disparities in areas like behavioral health, childcare access, and financial security for women, we've launched two new funds. One, a grantmaking endowment, expands the ability to meet community needs, while an operational fund aims to increase donor engagement and outreach. These new funds will help support growth by offering more opportunities for women to support women through philanthropy and encourage allyship to benefit our whole community. Additionally, the Women's Fund is blending our granting and fundraising events to connect to the issues most important to Portage County women through community discussions and learning events connecting donors to priority areas.

Founded in 1996, the Women's Fund achieved a \$1 million milestone in 2020, allowing for over \$40,000 annually in grants to women-centric programs. Initially

backed by organizations like the Community Foundation of Central Wisconsin, Stevens Point Area YMCA Foundation, and St. Michael's Foundation (now Aspirus Health Foundation), the Women's Fund has since grown with the support of additional partners throughout our community.

Recently, we celebrated this legacy and introduced new leadership, including director Sarah E. Ross and this year's advisory board, marking a shift from our volunteer-based model to one poised for greater impact.

As the Women's Fund steps into this dynamic future, we invite you to join us. Your contributions and advocacy are crucial in empowering women and enriching our community. Together, let's strive for a more inclusive and empowered future.



15 Years of Impact

# Strengthening Waushara County Together

15 years of  
Grants &  
Scholarships

**\$324,600**  
Total grants

**\$665,327**  
Total scholarships awarded

**\$82,281**

**Total COVID-19 relief awarded**  
Waushara County COVID-19 Relief Fund was created in 2020 and provided emergency grants supporting the people of Waushara County

**\$1,072,208**  
Total impact over 15 years



Reflecting on 15 years of partnership with the Waushara County community is truly inspiring. Since 2008, efforts such as the Wild Rose and Wautoma School District Scholarship Funds laid the groundwork for what would become a flourishing collaboration. Over the years, our partnership with the community has been strengthened through grants, scholarships, and organizational endowments. The generosity of legacy donors like Geraldine Hartford and her daughter Natalie has significantly enhanced our capacity to support diverse initiatives across Waushara County.

Since we started working together, the Community Foundation has helped move over \$1 million to invest in Waushara County. Whether you are a donor, grant or scholarship recipient, legacy society member, board and committee member, or a valued part of our community—your contribution has been instrumental in this shared journey of community growth.

Unity Recovery Services—Waushara SHINES 2023



Wayne H. Bushman Advanced Manufacturing, Engineering Technology, and Apprenticeship (AMETA™) Center



## Local Solutions

# Major Project Grants in Action



Each year, our Community Foundation gives up to \$50,000 to support one substantial project in our region. These Major Projects offer a chance to make a difference in the lives of people who call Portage and Waushara Counties home. They bring different parts of our community together to work on a shared goal. When we put money into these projects, we demonstrate our commitment to ensuring a strong, connected community today and into the future.

The Community Foundation of Central Wisconsin awarded the 2022 Major Project Grant to Mid-State Technical College. This funding was allocated to the Wayne H. Bushman Advanced Manufacturing, Engineering Technology, and Apprenticeship Center, a groundbreaking project at Mid-State Technical College. Set to open in the fall of 2024, the center is designed to cater to over 1,500 individuals annually, including technical college students, high school students, and other community members.

In 2023, the Community Foundation awarded a collaboration between CREATE Portage County and Central Rivers Farmshed. This partnership aims to establish a hub for community engagement,

*When referencing the millions of dollars subsequently fundraised, Mid-State Technical College President, Dr. Shelly Mondeik, remarked, “That doesn’t happen unless they see the community support and the need. We need to be celebrating this because it has been all people coming together. I am so happy to have your organization be part of the system.”*

featuring coworking spaces, meeting areas, and venues for events.

Max Trzebiatowski, the Community Foundation Board President-Elect, emphasizes the significance of this initiative: “This collaboration is a vital addition to our community. It revitalizes a historic space, converges resources, and nurtures entrepreneurship and local food sources. We are eagerly anticipating the positive outcomes this project and partnership will generate.”

# Statement of Financial Position

Together, we work to ensure your generosity makes an impact now and for future generations.

Total assets managed (including assets managed for others) for the fiscal year ending June 30, 2023.

## 2023 Assets

Cash & Cash Equivalents	\$1,190,090
Cash & Cash Equivalents Held for Investment Purposes	\$176,549
Investments	\$31,844,496
Other Assets	\$238,107
<b>Total Assets</b>	<b>\$33,449,242</b>

## Liabilities & Net Assets

Accounts Payable	\$25,969
Accrued Expenses	\$5,164
Grants and Scholarships Payable	\$145,109
Funds Held for Others Without Donor Restrictions	\$2,808,961
With Donor Restrictions	\$633,718
<b>Total Liabilities &amp; Net Assets</b>	<b>\$33,449,242</b>

## Revenue, Gains & Other Support

Contributions — Cash and Financial Assets	\$4,208,812
Contributions — Nonfinancial Assets	\$18,142
Investment Income, Net	\$2,751,943
Other Income	\$15,878

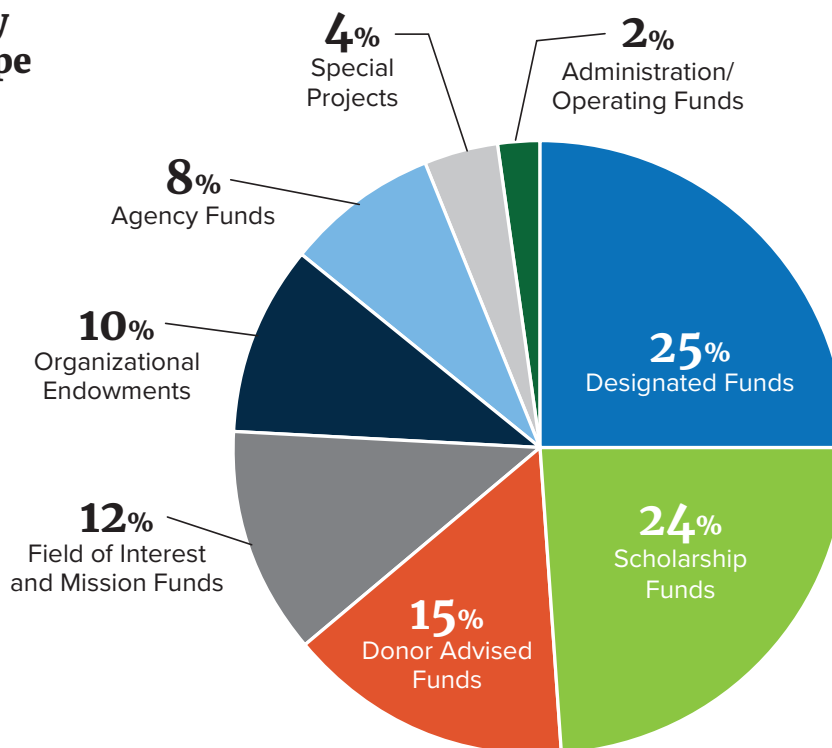
**Total Revenue, Gains & Other Support** **\$6,994,775**

## Expenses

Program Services	\$2,476,377
General & Administrative	\$195,021
Fund Raising	\$172,775

**Total Expenses** **\$2,844,173**

## Assets by Fund Type



Financials audited by CliftonLarsonAllen LLP, Certified Public Accountants and Consultants. Audited financial statements and the 990 tax form are available upon request from the Community Foundation office.



Foundation Leadership

# 2023-24 Board of Directors



**Katie Young**  
President



**Max Trzebiatowski**  
President-Elect



**Marc Bickford**  
Vice President



**Mark Scheunemann**  
Treasurer



**Cindy Weber**  
Secretary



**Dan Kinsella**  
Past President



**Peder Culver**  
Executive Member  
At Large



**Lindsay Bernhagen**



**Sam Dinga**



**Karli Klismith**



**Jim Koziol**



**Matt Lemke**



**Maureen Lewandowski**



**Neha Malik**



**Sue Matis**



**Nancy McCaskey**



**Sean Nimm**



**Rachel Pekowsky**



**David Ray**



**Tracey Stalter**



**Dave Williams**



## Community Foundation Team

From top left to right: Denise Brandl, Jenny Riegenbach, Marlee Samuels, KaYing Vang, Natasha Duda, Joey Greshowak, Torri Bradley, Sarah Ross.

## Community Foundation Committees

### Emeritus Board Members

Marg Coker-Nelson  
David Worth  
Sue Shulfer

### Emeritus Board Members In Memoriam

Mary Croft  
Helen Godfrey  
Betty Iber  
Mark Ilten  
Edie Kraus  
Mark Makholm  
Gil Oelke  
George Rogers  
Ann Schierl  
Bob Worth

### Investment Committee and Affiliations

Mark Scheunemann, Chair – Legacy Accounting & Financial Services LLC  
Marc Bickford – Kubasta Bickford & Lorenson, S.C.  
Max Trzebiatowski – University of Wisconsin - Stevens Point  
Tracey Stalter – Michael Smith & Associates  
Sean Nimm – Sentry Insurance  
Matt Lemke – The Portage County Bank  
Justin Regnier – Nicolet National Bank  
Pratima Gandhi – University of Wisconsin - Stevens Point  
Simone Fevola – Marshfield Clinic Health System  
William Cherek – Cherek, Pucci & Quick, SC

### Portage County Community Grants Committee

Rachel Pekowsky, Chair  
Max Trzebiatowski  
Tracey Stalter  
Jim Koziol  
Sam Dinga  
Layne Cozzolino  
Stephon Kiba Freeman  
Ben Nusz  
Mae Nachman  
Miguelgabriel Campos  
Carrie Jarosinski  
Megan Tenpas

### Waushara County Community Grants Committee

Rachel Pekowsky, Chair  
Nancy McCaskey  
Dave Williams  
AJ McCaskey  
Lanie DeMars

### Scholarship Committee

Dave Ray, Chair  
Karli Klismith  
Marc Bickford  
Peder Culver  
Neha Malik  
Sue Matis  
Sean Nimm  
Amanda Arens  
Amanda Flick  
Quyem Hom  
Larry Oathout  
SuAnn Pagel-Rast  
Wendy Robinson  
Steven Thompson  
Gail Viergutz  
Karen Ghinazzi

### Development Committee

Jim Koziol, Chair  
Moe Lewandowski  
Dave Ray  
Dan Kinsella  
Neha Malik  
Lindsay Bernhagen  
Katie Young  
Dave Williams  
Matt Lemke

### Waushara County Event Sub-committee

Nancy McCaskey, Co-Chair  
Peder Culver, Co-Chair  
Karli Klismith  
Sue Shulfer

### Women's Fund Advisory Board

Lindsay Meyer, Co-chair  
Sue Shulfer, Co-chair  
Heather Huebner  
Katie Jacobs  
Charity Jirschele  
Samantha Klebe  
Mikayla Kleifgen  
Meg Kolb  
Mary Lane  
Beth McBride  
Kara Mrozek  
Sally Page-Olson  
Mary Patoka  
Erin Trzebiatowski  
Cindy Weber  
Cindy Yang

COMMUNITY FOUNDATION  
OF CENTRAL WISCONSIN

2801 Hoover Road, Unit 1B  
Stevens Point, WI 54481



Excellence. Accountability. Impact.™

## Connect with Us

CALL  
715-342-4454

EMAIL  
foundation@cfcwi.org

VISIT  
www.cfcwi.org



Scan this  
QR code  
to connect  
with us.

## How to Give

**Donate to an existing fund:** Connect your resources with others for greater impact.

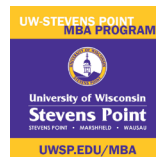
**Start a fund:** Tailor a fund to your specific philanthropic vision.

**Leave a legacy:** Ensure your generosity endures beyond your lifetime.

We welcome a variety of giving formats that suit your financial circumstances including cash, bequests, planned gifts, IRA funds, life insurance policies, stock, or real estate.

**Contact us today to learn more and jumpstart your giving journey.**

## Convening Sponsors



## Annual Report Support

