

2012 Report



JEFFERSON COMMUNITY FOUNDATION

"Growing a Strong Community Through Generous Giving"

Greetings:

The Board of Directors of the Jefferson Community Foundation is pleased to present the Foundation's annual financial report for fiscal July, 2011, through June, 2012.

While it has been a difficult year financially for individuals, families, and businesses throughout the country, the Board is again amazed at the compassion displayed by the people of the Jefferson Community. They care about the success of the community, and when asked to help, they do so. The Foundation accepted contributions from over 25 new donors from our annual appeal.

Because of this generosity, the Foundation was able to extend grants to the School District of Jefferson for the West Elementary Garden project, Gemuetlichkeit Days, Jefferson High School STAR program, Council for the Performing Arts, and the School District of Jefferson Character Education Initiative.

Scholarships totaling over \$57,000 were paid on behalf of 30 Jefferson students. Included in these scholarships was the establishment of three new scholarship funds, Jefferson Sno-Hawk's Scholarship, Tyler Kreklow Memorial Scholarship, and the Gaylin Morgan Scholarship. Our Jefferson students continue to benefit thanks to the generosity of these families and organizations.

The Foundation also accepted the donor-advised fund for the Randy Schopen Memorial Fund which was established by several community members in honor of Randy.

The Jefferson Community Foundation was created in 1999 to receive gifts, administer funds and make distributions for charitable purposes for the benefit and improvement of residents of the Jefferson School District. In addition to more than 45 designated, special project and scholarship accounts, the Jefferson Community Foundation is home to the "Greater Jefferson Fund."

A nine-member, volunteer board of directors governs

the Jefferson Community Foundation. Serving at the conclusion of the 2012 fiscal year were Eric Felth, chair; Dr. David Volk, vice-chair; Shellie McDermott, secretary; Lane Albrecht and Harv Linse, Co-Treasurers; Ron Michaelis, Tom Monogue, Sally O'Brien, Laura Peachey, and Ron Wegner.

At the Foundation's re-organizational meeting for 2012, Sally O'Brien was elected chair, Tom Monogue vice-chair, Lane Albrecht treasurer, and Michelle McDermott was re-elected secretary. Joining the board for 2012 will be Peggy Bare to replace Eric Felth as the Chamber of Commerce representative, Jim Shuda, and Marv Moldenhauer to fill the member-at-large vacancies of Dave Volk and Ron Wegner.

We are all proud of the projects and scholarships made possible by the generosity of the citizens of the Jefferson area. The Board of Directors encourages you to continue your contributions. You may designate your gift to the "Greater Jefferson Fund" or any of the Special Funds. New funds can also be established. Applications are available from any board member or at www.Jeffersoncommunityfoundation.org. All donations to the Jefferson Community Foundation are tax deductible. Donations may take the form of cash gifts, stocks, bonds, real estate, deferred gifts, bequests or life insurance.

I encourage you to go to our website and view a short video we've put together illustrating some of the amazing things this organization has done and continues to do. Will you help us grow?

Eric Felth, Chairperson, 2011-12
Jefferson Community Foundation

Board Members

Lane Albrecht	Peggy Bare	Harv Linse
Ron Michaelis	Marv Moldenhauer	Tom Monogue
Sally O'Brien	Laura Peachey	Jim Shuda

Assets at Year End:	\$1,379,134	
Greater Jefferson Fund	\$114,257	
Scholarships:		
Advertiser	5,093	
Urania Bienfang	211,200	
Shari Biwer Memorial	16,803	
Vic Buelow/Amer Legion Band	2,768	
Butts/Townsend	25	
Class of 1960	9,282	
Citizens Bank Scholarship	501	
Robert Cowley/Jefferson Lions	502	
Joe Davies Scholarship	66	
Donald Dunnington	1,006	
Fern Fernholz Goff	16,066	
Fort Memorial Health/Handeyside	133	
Friedel	3,956	
Stuart & Stanley Hake	96,503	
Debra Happ Memorial	18,278	
Tami Hess	2,530	
Jefferson Sno-Hawks	500	
Trisha Rockstroh Kerr	1,350	
Ryan Keuler	1,158	
Kiwanis	4,227	
Tyler Kreklow Memorial	500	
Carol Linse	818	
Masonic Lodge #9	1,148	
Meinel/Van Galder	2,287	
Dr. John Phelps	6,470	
Duane Quale	3,794	
Reinel Law Enforcement	6,635	
Brad Russell	18,595	
Schweiger Scholarship	37,509	
Second Chance Grant	49,394	
Julius Smith Scholarship	408	
Sportsmen's Club	50	
Jerry Tennyson Scholarship	0	
Dr. Brian Turley Scholarship	2	
UW Alumni Assoc.	13	
Dan Wenkman Memorial	3,155	522,725
Special Funds:		
Bandshell Fund	8,662	
Council for the Performing Arts	207	
Delinquency Prevention	119	
Destination Imagination	6,726	
FISH	44,427	
Fort Memorial Hospital Fund	300	
Gemuetlichkeit Days, Inc.	485	
Historical Society	7,626	
Jefferson Food Pantry	60,315	
Jefferson Park and Rec	927	
Jefferson Playland	5,013	
Jefferson Public Library	352,996	
Jefferson Schl Expendable Fd	2,537	
Jefferson Youth Basketball	376	
Lewis Family Fund	17,934	
Morgan Family Fund	113,128	
Jefferson Youth Baseball	8,681	
Jefferson Area Senior Center	6,027	
Randy Schopen Mem Fnd JCF	62,074	
Tensfeldt Park	612	
Youth Tackle Football	8,714	707,886
Total Fund Balance, June 30, 2012		\$1,344,868

Donations Received This Year		
Greater Jefferson Fund		\$1,515
Scholarships:		
Joe Davies Scholarship	5,000	
Donald Dunnington	1,000	
Debra Happ Memorial	3,000	
Tami Hess	300	
Jefferson Lions - Robert Cowley	1,000	
Jefferson Sno-Hawks	500	
Trisha Rockstroh Kerr	500	
Ryan Keuler	500	
Tyler Kreklow Memorial	500	
Masonic Lodge #9	1,000	
Brad Russell	925	
Julius Smith	200	
Sportsmen's Club	1,000	
Dr. Brian Turley	1,000	
UW Alumni Association	1,320	
Dan Wenkman Memorial	3,155	20,900
Special Funds:al Funds:		
Bandshell Fund	5,450	
Jefferson Library Fund	9,741	
Jefferson Youth Baseball	1,300	
Jefferson Youth Tackle Football	8,000	
Jefferson Area Senior Center	2,249	
Randy Schopen Mem Fnd JCF	62,967	89,707
Total Contributions Received This Year		\$112,122
Cash Disbursements		
Greater Jefferson Fund		\$3,300
Scholarships:		
Advertiser	750	
Urania Bienfang Scholarship	22,250	
Shari Biwer	1,000	
Joe Davies Scholarship	5,000	
Donald Dunnington	500	
Friedel Scholarship	200	
Fort Memorial Health/Handyside	1,500	
Fern Fernholz Goff Scholarship	400	
Stuart & Stanley Hake	5,000	
Debra Happ Scholarship	2,000	
Tami Hess Scholarship	600	
Jefferson Lions - Robert Cowley	500	
Trisha Rockstroh Kerr	2,000	
Ryan Keuler Scholarship	500	
Carol Linse Scholarship	500	
Masonic Lodge #9 Scholarship	1,000	
Dr. John Phelps Memorial	500	
Duane Quale Memorial	2,000	
Schweiger Scholarship	6,000	
Julius Smith Scholarship	200	
Sportsmen's Club Scholarship	1,000	
Jerry Tennyson	9,741	
Dr. Brian Turley Scholarship	1,000	
UW Alumni Scholarship	1,500	65,641
Special Funds:		
Bandshell Fund	46,430	
Jefferson City Library	2,223	
Jefferson Park & Recreation	965	
Lewis Family Fund	1,500	
Randy Schopen Mem Fnd JCF	500	51,618
Total Charitable Disbursements This Year		\$120,559
Summary of Combined Account Activity		
Balance as of July 1, 2011		\$1,379,134
Interest		21,127
Contributions Received		112,122
Market Adjustment		-35,792
Balance Before Expenses/Disbursements		1,476,591
Less Expenses		11,164
Less Charitable Disbursements		120,559
Balance at June 30, 2012		\$1,344,868

"Make a Difference Today and Tomorrow"

Jefferson Community Foundation	
TOTAL DISBURSEMENTS	
Fiscal Year Ending 6/30	Disbursements
2000	\$ 16,250
2001	20,891
2002	74,452
2003	37,662
2004	28,204
2005	50,511
2006	79,439
2007	137,956
2008	53,505
2009	77,917
2010	96,036
2011	63,986
2012	120,559

Yes, I would like to do my part to support the fine work of the Foundation.

Enclosed is my donation \$ _____ to help us toward an even better community.

Signed _____

Address _____

Mail to: Jefferson Community Foundation
P.O. Box 81,
Jefferson, WI 53549