

The Greater Cedarburg ...NOW AND FOREVER FOUNDATION

A Newsletter for the Friends of the Greater Cedarburg Foundation

Eighteenth Edition — Fall 2011

Fall Gala a Resounding Success

It was a party with plenty of action as patrons of the Greater Cedarburg Foundation came out in strong numbers to support its efforts by attending the sixth annual President's Gala on September 24th at North Shore Country Club in Mequon. The gala - which was attended by nearly 200 people - raised a record amount of nearly \$55,000, breaking past fundraising records. "It was possibly the most fun gala of all," said Patty Gallun-Hansen, co-chair. "We raised a record amount of money which was tremendous considering the hard economic times we are living in."

Guests were greeted by beautiful piano music from local musician Rob Clapper as they joined their friends and fellow community members at the scenic North Shore Country Club on a crisp fall evening. The \$150-a-person affair is the only fund raising event all year, and Gallun-Hansen and fellow gala committee members were hoping to raise awareness of the Foundations' grant making activities as

well as raise significant donations to assist in on-going philanthropic work.

Cocktails and mixing were punctuated by a wine pull which included a raffle for two Waterford crystal flute glasses won by local resident Ann Pagel. A new giving option called "Key to my heart" was held where patrons could buy "keys" for \$50 and one of the 50 keys opened a case with a diamond and sapphire bracelet worth \$4,200. Ten finalists from the 50 keys sold were called up to the stage to try and open the case to win the bracelet, generously donated by Dorothy Gallun Fine Jewelry. Shirley Krenzke, Board treasurer, was the lucky winner much to the delight of the crowd.

There was also a game of heads and tails which was won by Steve Cain, an attorney and local resident who attended his first Gala. Cain gave an impromptu speech about the merits of living in a town such as Cedarburg. "There were interactive

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Board member Shirley Krenzke reacts as she wins the \$4,200 diamond and sapphire bracelet



Patty Gallun Hansen, co-chair of the Gala, welcomes guests.

Annual Appeal Underway

The Greater Cedarburg Foundation kicked off its Annual Fund Drive in November and board members are anticipating a positive response from the community.

"This marks the beginning of our annual campaign to help us achieve the goals of the Foundation, which is to grow our endowment for grants to those in need of funding throughout the year," said Brian Collins, a board member and chair of this year's Annual Drive. "People will see an immediate impact from their contribution as we continue to fund worthwhile causes." More than 2,000 letters were mailed last month as part of the appeal.

Collins said that the fund drive targets those individuals who are interested in giving any size amount of donation. Donations can start at \$25, and Collins added the appeal comes at a good time so people can take advantage of the remaining weeks of giving left in 2011. "No donation is too small, and every donation counts for us," he said.

This past year, the endowment gave out more than \$50,000 in grants to several organizations, including the Cedarburg Fire Department, Family Sharing of Ozaukee County, Riveredge Nature Center, North Shore Academy of the Arts, and the Volunteer Center of Ozaukee County.

Fall Gala (from pg. 1)

games, and great testimonials all night that really spoke to why we all love Cedarburg," Gallun-Hansen said. Other fund raising activities included the sale of a new book called "Images of America: Cedarburg" put together by local journalist Lisa Curtis. Ryan Olsen of Olsen's Piggly Wiggly donated all of the books for sale, which raised \$400.

Dinner was punctuated by opening remarks from Foundation President Ben Levy, who thanked everyone for coming and spoke of large donors as well as those who give their time and talent to make Cedarburg a better place. Levy also mentioned the Legacy Society and said many people who attend a gala end up becoming Legacy Society members. "The evening gives them a chance to understand just who we are and how much we impact the community," he said.

The night was capped by a verbal auction which raised more than \$15,000 and ended with a surprise donation of \$2,000 from a gala attendee who sought others to give and match his donation. In no time, 15 people stepped up and the \$2,000 was matched. The evening ended with the delightful sounds of the Mark Davis Quartet amidst dancing and conversation.

Many thanks go out to the presenting sponsor Port Washington State Bank, and other sponsors which included Olsen's Piggly Wiggly, Commerce State Bank, Carlson Tool & Manufacturing Corporation, Levy & Levy, and Harris Bank. "Our galas are just getting better and better and I really want to encourage people to attend next year," Gallun-Hansen said. ■



Nearly 200 people attended the 6th annual President's Gala at North Shore Country club

Foundation hosts Mike Miller Presentation in Cedarburg

On Monday, November 21, the Greater Cedarburg Foundation hosted a financial presentation at the Cedarburg Cultural Center which featured Mike Miller, managing director of New York City-based Colonial Consulting. Miller, who is the investment adviser for the Greater Milwaukee Foundation, discussed his investment strategy as it applies to the GMF. "In today's rapidly changing economic environment, Mike has a wonderful way of stressing the importance of maintaining a long-term perspective in spite of the short-term market swings," said Chris Smith, chair of the development committee for the Greater Cedarburg Foundation. "I always come away from his presentations with the peace of mind that the monies generously contributed to our foundation are well managed."

During his presentation, Miller outlined an investment review of their advisement of the Greater Milwaukee Foundation assets. He discussed the GMF strategic asset mix and the Foundation's approach, which is focused on achieving long term return objectives and a diverse portfolio by asset class and strategy. "What we're trying to do is safeguard and protect these assets for future generations," Miller said after the presentation.

As a supporting organization of the Greater Milwaukee Foundation, the endowment of the Greater Cedarburg Foundation is managed by the GMF. Founded in 1980, Colonial Consulting provides investment advice and full service consulting with an emphasis on non-profit institutions, endowments and foundations. This was the second visit by Miller to Cedarburg, who also makes



Mike Miller, managing director of New York City-based Colonial Consulting

investment advisor presentations at the Greater Milwaukee Foundation several times each year. For more information, see the investment information section of the GMF website at www.greatermilwaukeeefoundation.org. ■

GCF awards \$10,000 for book project

One of the recent grants approved by the Greater Cedarburg Foundation was for \$10,000 to the Cedarburg Cultural Center. The center will use the grant money to help publish a children's book called "Cedarburg" by noted children's book author Barbara Josse. "Barb approached us about three or four months ago with the idea of a children's book about Cedarburg," said Lauren Hofland, executive director of the Cedarburg Cultural Center. "We thought it would have broad appeal for people who live in Cedarburg and the surrounding area but also for people who come here to visit." Josse and illustrator Renee Graef will donate most of the proceeds of the sale of the books to the Cultural Center.

"I wanted to capture the spirit of this town," said Josse, who was just named the notable Wisconsin Author of the Year by the Wisconsin Library Association. "I describe Cedarburg as a place that allows you to be a kind person." The book will chronicle the travels of a child and his friend as they make their way through Cedarburg and stop at several landmarks, including the Rivoli Theater, the Settlement, and even Strawberry festival. Josse said the book will be written in a rhythmic style, and said the opening sentence will read something like, "I know about a little place, A creek in the middle little place. A steeple place, a people place, a dogs and frogs and geese place."



GCF President Ben Levy presenting a check to Lauren Hofland, Executive Director of the Cedarburg Cultural Center.

Hofland said she expects the book to have broad appeal to anyone, regardless of where they came from. "If you're a Cedarburg person, you will be especially charmed by it, but even if you're not from here, it's about the place where you grew up." The book is scheduled to be published next fall and ready for sale for the 2012 holiday season. ■

Supporting Organization Status Realized!

This fall, the Internal Revenue Service approved the re-classification of The Greater Cedarburg Foundation as a supporting organization of the Greater Milwaukee Foundation. Ben Levy, President, said the Greater Cedarburg Foundation's endowment needed to reach \$1.25 million in order to be considered a supporting organization of the GMF. The Foundation's assets, including 6 component funds is now over \$1.9 million. Before this affiliation was achieved, the foundation was a donor advised fund of the Greater Milwaukee Foundation, a not-for-profit Foundation that assists in managing more than 1,100 funds which total more than \$540 million in assets.

Jedd Lapid, Director of Development and Donor Service for the GMF, explained that as a supporting organization, they will perform due diligence and complete accounting and auditing functions for the Greater Cedarburg Foundation. They will also develop a competitive grant making process and allow applicants to use the web based application process for grant requests. In addition, individuals, non-profit

organizations and private and corporate foundations will be able to establish named component funds within the Greater Cedarburg Foundation. "Now that we have achieved this status, we are better able to assist people and become their philanthropic partner," said Ben Levy, President. "It will allow us to help people with their own funds use the expertise and assistance from both the GMF and our foundation."

Maribeth Bush, incoming President of the Oconomowoc Foundation, said their organization reached Supporting Organization status with the GMF in 2007. "The Greater Milwaukee Foundation helps us in many ways, but one of the most important is making sure the grant requests are complete - they even assist the applicants with the process," she said. "They are a blessing!" ■



*A Legacy
can perpetuate
your
Charitable
Goals*

*The Greater
Cedarburg
FOUNDATION*

**YOUR COMMUNITY
FOUNDATION**

P.O. Box 711
CEDARBURG, WI 53012
262-377-7338
cedarburgfoundation.org

Foundation advertises year-end giving

You may notice an advertisement for the Foundation in the December issues of the News Graphic newspaper this month. For the third year, the ad has been placed to catch the attention of community members so they might consider the foundation for their year-end giving. "We are seeing that many people want to take advantage of the timing of their donations, and this is a gentle reminder that we as a Foundation are here to offer that option," said Ben Levy, President. "Because we give grants to so many local worthwhile organizations and projects, people can rest assured their donation is going to great causes that benefit the entire community." Anyone interested in making a donation can call the Foundation at 262-377-7338. ■

ABOUT THE FOUNDATION

Board of Directors:

Mark Benskin	Patty Gallun Hansen
Carole Blaney	Bob Loomis
Mary-Kay Bourbulas	Jim Myers
Ted Brueggemann	David Pagel
Brian Collins	Andy Schlidt
Joe Fazio	James Showalter
Terri Haas	Jerry Voigt
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Chris Smith
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Shirley Krenzke
Treasurer

Susan Lange
Secretary

Bob Chmielewski
Past President

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The Greater Cedarburg Foundation is a community trust that establishes endowments and administers the income thereon for the betterment of the greater Cedarburg area. The Greater Cedarburg Foundation works closely with the Greater Milwaukee Foundation, where it maintains an affiliation. Gifts to the Greater Cedarburg Foundation are tax deductible to the extent applicable under relevant tax law.



www.cedarburgfoundation.org

Fall Gala Photo Gallery



Joseph Rintelman, Jennifer Stevens, Katie Rintelman-Pipkorn and Matthew Pipkorn.



Past President Jim Coutts and Carol Alexander watch as guests Kristina Rick and Laura Harrigan find their name tags.



Gala Committee (from left) Vicki Capadona, Patty Gallun Hansen, Candy Flagstad, Peg Edquist, Terri Haas, Carol Alexander. Lisa Vogt (not pictured)



Guest Ann Pagel picks a cork for the wine pull while husband and board member Dave looks on. Ann had the winning cork for two Waterford Glass flutes.

Gala photos by Deb Kranitz