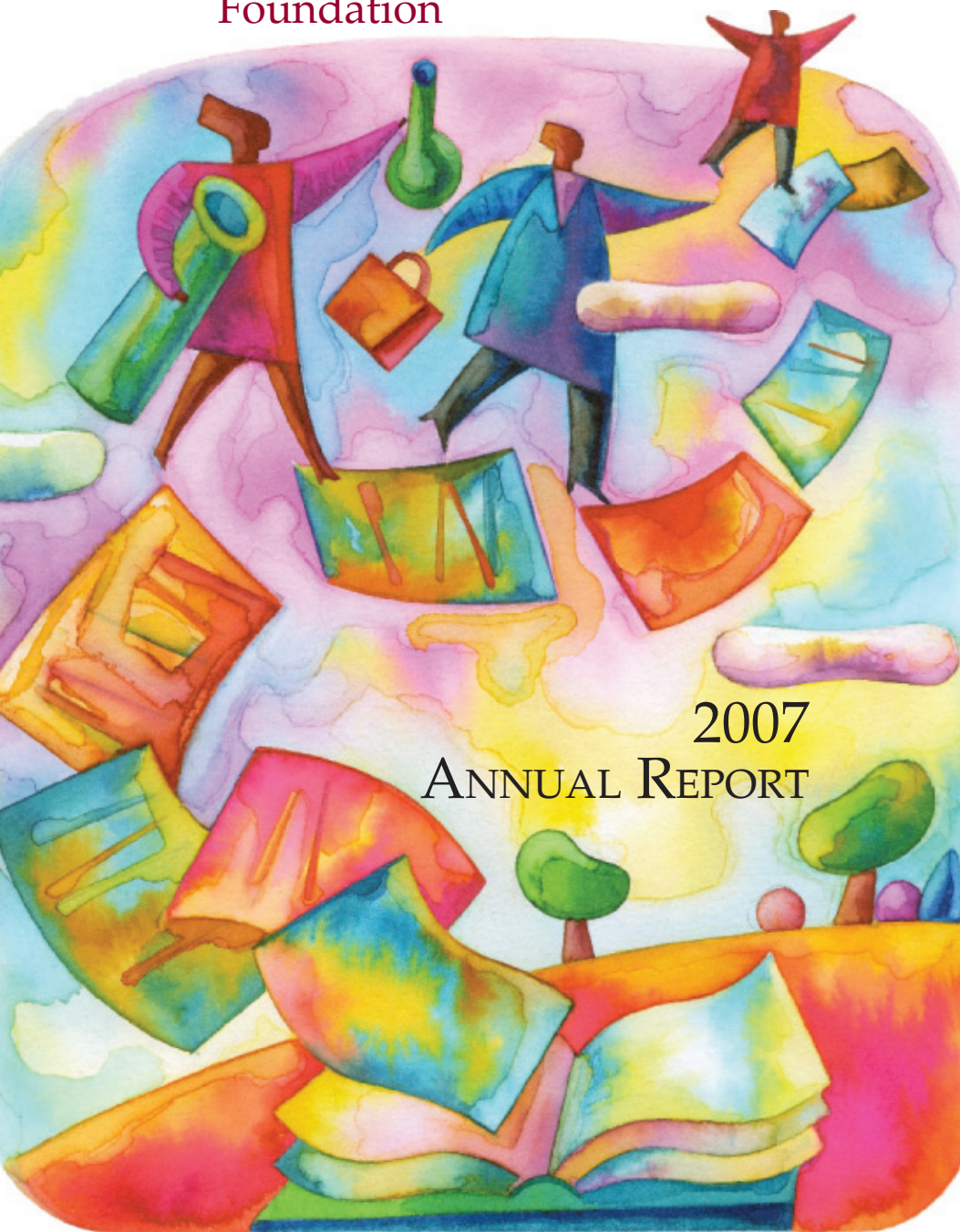


The
FAYE McBEATH
Foundation



2007
ANNUAL REPORT

2007 Annual Report

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Story

The Story of Faye McBeath



Portrait of Faye McBeath
by J. Anthony Willis
Kevin Kotke, Photographer

Faye McBeath was born in Milwaukee on February 4, 1882, the only child of Violette Nieman McBeath and Charles Henry McBeath.

She attended public school in Milwaukee, graduating from West Division High School in 1902. After completing a two-year course at the old Milwaukee Normal School, she taught in public schools in Milwaukee and Wisconsin Rapids until returning to college to complete her formal education. She graduated from the University of Wisconsin with a Bachelor of Arts degree in 1913. She then taught at North

Division High School until 1916 when her uncle, Lucius W. Nieman, founder of The Milwaukee Journal, persuaded her to join the Journal Company where she served in various posts for the next twenty years.

Upon Mr. Nieman's death in 1935, Miss McBeath inherited one-fourth of his holdings in the Journal Company, a substantial fortune which was eventually used to establish the Faye McBeath Foundation.

During the last thirty years of her life, Miss McBeath devoted herself actively to a variety of causes in the greater Milwaukee community. She established the Lucius W. Nieman Chair of Journalism at Marquette University in memory of her uncle, and gave generously and quietly to support many programs relating to the education and care of children, help for the blind, and in the arts. In her later years, she was honored by many organizations and institutions that had been strengthened by her leadership, her gifts, and her compassion.

Upon her death on June 7, 1967, the bulk of her estate went to the Foundation, which she had created a few years earlier, to be devoted entirely to the welfare of the people in the community in which she and her uncle had lived and worked.

For those interested in more information on the Foundation, [A Time for Giving](#), which covers the history and evolution through the late 1990's, is available in limited quantities at the Foundation offices.

Message

Message from the Chairman

2007 was a year that the Foundation focused on major priorities established in 2006, namely education of young children, the enhancement of nursing and other investments that strengthen the civic fabric of the Greater Milwaukee area.

- The Foundation coordinated and successfully secured a national Partners Investing in Nursing (PIN) grant of \$250,000, local grants from other funders totaling \$80,000 and collaborating partner cash match of \$75,000. McBeath is providing a \$60,000 grant, which helped leverage additional national and local support of \$405,000. Key collaborators are Robert Wood Johnson and Northwest Health Foundation, the WI Center for Nursing, NW Mutual and Greater Milwaukee Foundations.

- The Foundation underwrote a training session on effective planning, design and development of playgrounds, with Safe and Sound and KABOOM!

- We co-hosted a design charette with numerous funding and community partners at UW-Milwaukee. Eight teams of architects, and 100+ volunteers who attended focus groups and visited the charette, and an overflow crowd at the public reporting session were highlights. Four community forums in charette site neighborhoods were held to publicize results. One site is proceeding in its development, and the project received national recognition through Grantmakers in Aging. Major collaborators included UW-Milwaukee's School of Architecture and Urban Planning, the Donors Forum of WI, United Way and Milwaukee County Department on Aging.

- The Trustees began an annual process of direct review of selected project evaluations and discussing lessons learned. These sessions enrich our knowledge of community and the craft of grantmaking.

- A trend of providing additional evaluation support to selected applicants (Milwaukee Public Library, Woodland Pattern and Urban Ecology Center) continued with solid gains in measurement and reporting a result.

- In support of a vital institution, a major grant of \$100,000 was awarded to the Milwaukee Public Museum's debt retirement plan. While a diversion from customary grantmaking, this award reflects the Trustee's sentiment that a vibrant and stable Public Museum is important to our community.

- Several projects that could represent regional models were funded – the Crisis Resource Center (with Robert Wood Johnson, Greater Milwaukee Foundation and others), Emergency Department Nurse Case Manager project (S.E.T. Ministry, St. Joseph's Hospital and Assurant Health), and the Violence Free Zone Project (MPS, the Lynde and Harry Bradley Foundation and two local nonprofits).

In all the cases cited, the Foundation responds to and works with local leaders and colleagues who seek to improve the community. The accomplishments are theirs, and we achieve a measure of satisfaction in the results. As the above list indicates the Foundation often acts in partnership with other leaders and organizations in the community.

In the coming months and years, we will continue to search for ideas, initiatives and programs that have an impact in our areas of interest: "Children, Aging and Elders, Health and Health Education, and Civic and Governmental Affairs". We will do so under new leadership in 2008, as I have served my final year of a 3-year term as Chair. Patsy Aster, the new Board Chair, will no doubt help us improve upon our work in the coming year.

On behalf of all the Trustees, I would like to thank Scott Gelzer, Executive Director and Laura Mullen, Executive Assistant for another year of dedication and exceptional leadership and administration of the Foundation business.



Steven J. Smith
Chairman of the Board

Application

Who qualifies for a grant?

Grants are made to nonprofit, tax-exempt 501(c) (3) organizations organized under the laws of the State of Wisconsin. Grants are made within the state of Wisconsin and principally to support programs having primary focus on the residents of the greater Milwaukee community including Milwaukee, Waukesha, Ozaukee and Washington counties.



What types of grants are awarded?

The majority of grants support specific programs. On occasion, operating grants are awarded. Capital grants are limited to projects with community-wide impact that reflect the program interests of the Foundation.

What criteria are used to assess proposals?

Benchmarks that will be applied to projects and organizations in all five interest areas are the following:

- Strength of proposal - Foundation guidelines match
- Quality and creativity in project design, implementation and evaluation
- Quality of the applicant nonprofit's leadership and organizational capacity
- Potential to stretch or leverage McBeath funds
- Specific interests of Trustees and/or staff

Other grant-related information

- The Foundation does not award grants for annual fund drives, scholarships, support of individuals, sponsorship of fundraising events, or emergency funds.
- The Foundation does not consider general solicitation letters.
- Basic health sciences research is not funded by the Foundation.
- There are no published deadlines for grant proposals. Proposal deadlines are established based upon discussion with Foundation staff.
- Letters and proposals are to be submitted to staff at the Foundation offices.
- Any discussion of the availability of funding in a subsequent year should be initiated by the grantee and discussed with staff at least 60 days in advance of a project anniversary.

Application Process

1 Letter of Intent. Prepare a 1-2 page letter that includes a brief description of the applicant organization, the program to be funded, the corresponding match between the Foundation's guidelines and the request, the amount requested and the estimated total project budget. Include the name and address of the organization, and the name, phone number and e-mail address of a contact person. There are no deadlines for letters of intent. Letters will be considered as they are received; timing of actual response and any scheduling of a full proposal may vary.

Send the letter of intent to:

Scott Gelzer, Executive Director, The Faye McBeath Foundation
1020 N. Broadway, Suite 112, Milwaukee, WI 53202
info@fayemcbeath.org

2 Communication from Foundation. Upon receipt of a letter of intent, Foundation staff will formally respond by e-mail or letter. Staff may contact you to discuss the project and in some cases, may schedule a site visit. If the request is outside the current program, geographical, or funding interests of the Foundation, a letter will be promptly sent informing you of this determination.

3 Formal Invitation. Generally, applicants can expect a response to a letter of intent within 60 days of a letter's receipt. The final response will either be a decline of the letter or a formal invitation to submit a full proposal.

4 Submittal of Full Proposal. If you are formally invited by McBeath staff to submit a full proposal, you will be asked to use the Wisconsin Common Grant Application Form. The Foundation requires that a volunteer serving on the Board sign the application. Meetings are scheduled with many applicants at this stage of review. If possible, a person serving on the Board of Directors of the applicant nonprofit should participate in the meeting.

5 Trustees' Decision. The Trustees meet four times each year to consider grant proposals - generally in February, May, September and December. Written notification of Trustees' decision regarding a grant proposal will be sent within ten days of the meeting. Organizations awarded grants will receive written notification of grant conditions, payment dates and reporting requirements.

Funding Interests

The Foundation's Trustees are primarily interested in promising or established programs, operated by well-managed organizations. Benchmarks that will be applied to projects and organizations in all five interest areas are the following:

- *Strength of proposal - Foundation guidelines match*
- *Quality and creativity in project design, implementation and evaluation*
- *Quality of the applicant nonprofit's leadership and organizational capacity*
- *Potential to stretch or leverage McBeath funds*
- *Specific interests of Trustees and/or staff*

CHILDREN

The Foundation supports promising programs or established approaches promoting the welfare of children, particularly those living in poverty.

Specifically, the Foundation supports:

- Expanding opportunities for youth development, involving boys and / or girls, in programs that engage youth as resources.
- Protecting children in dysfunctional or out-of-home living situations.
- Building or renovating community playgrounds in Milwaukee.
- Strengthening parenting skills and resources for parents.

The highest priority in the children's area will be placed on results-oriented education programs serving ages 1 - 13.

Specific interests are efforts that:

- Improve or maintain reading skills, year round.
- Enhance staff development benefiting public and private school recruitment, retention and instructional improvement.
- Provide substantive enrichment programs for both before and after school time periods. Summer programs will also be considered.
- Improve parent involvement and build family engagement in education.
- Enhance high-performing schools, both private and public.

AGING & ELDERS

The Foundation supports promising programs or proven approaches for the challenges and opportunities involving adults aged 60 and older.

Specifically, the Foundation supports:

- Enabling elders to remain in the community, with a particular interest in living situations and services that help older adults “age in community”.
- Encouraging collaboration, networking and skills enhancement among service providers.
- Expanding opportunities for older adults, including projects that engage elders as resources in the community, improve access to and use of technology, and promote healthy aging.

HEALTH

The Foundation supports promising programs that will improve access to basic and preventive health services for underserved populations. The Foundation will place a higher priority on projects that link health and health education efforts.

Specifically, the Foundation supports:

- Expanding and enhancing the quality and scope of community-based primary and rehabilitative health services, including dental and mental health.
- Reducing homelessness and hunger in the Milwaukee area.
- Protecting children and adults from abuse and neglect.

HEALTH EDUCATION

The Foundation supports promising programs and fresh approaches in health education that lead to improved public health.

Specifically, the Foundation supports:

- Enhancing community programs that promote healthy lifestyles among children and adults.
- Supporting creative solutions addressing worker shortages and education of professionals in the health care field.
- Improving linkages between health care institutions and community organizations.

Funding Interests

CIVIC AND GOVERNMENTAL AFFAIRS

The Foundation is interested in building the capacity of nonprofit organizations and underwriting efforts to improve the effectiveness of local and regional government.

Specifically, the Foundation's interests encompass:

- Supporting projects for capacity-building of nonprofit and civic organizations, including:
 - The Nonprofit Management Funds of Greater Milwaukee and Waukesha County.
 - An annual *Report Card on Charitable Giving*.
 - Other projects of interest to the Trustees that are of timely importance.
- Underwriting studies and other consensus-building strategies to improve community services and policies in Foundation priority areas.
- Building regional cooperation in areas of Foundation interest.

FACTS

The Faye McBeath Foundation is a private, independent foundation providing grants to tax-exempt nonprofit 501(c) (3) organizations in the metropolitan Milwaukee area.

Its major areas of interest — children, aging & elders, health, health education, and civic and governmental affairs — were established by Faye McBeath and do not change. However, specific grantmaking interests within each of these major categories change periodically. The Faye McBeath Foundation was established in 1964, shortly before the death of Faye McBeath in 1967 and has been providing organizations with support for 43 years.

2007 Grants Awarded

CHILDREN

10-34 Wisconsin, Inc. (formerly Children's Safety Services)
\$10,000, Milwaukee, WI

For the support of Prevention Education, to build awareness and greater competence among children regarding varied dangers outside the home and on the Internet.

Aurora Sinai Medical Center
\$3,000, Milwaukee, WI

Year-end gift for Project Nikki.

Big Brothers Big Sisters
\$40,000 over 2 years, Milwaukee, WI

For the *Amachi Project* aimed at helping children of incarcerated parents by matching them with warm, caring adults through a cooperative partnership of public and private organizations.

Boy Scouts of America-Milwaukee County Council
\$3,000, Milwaukee, WI

Year-end gift.

Center for Blind & Visually Impaired Children

\$2,000, Milwaukee, WI

Consultant fees to develop the resources and refine planning for 'Lighting the Way' project, to engage families in center services

COA Youth and Family Centers
\$40,000, Milwaukee, WI

Family-Centered Programming Initiative, 3rd year support.

Counseling Center of Milwaukee
\$20,000, Milwaukee, WI

For the Pathfinders runaway and homeless youth program, providing shelter, counseling, case management, street outreach, and supportive services.



Diverse & Resilient, Inc.
\$10,000, Milwaukee, WI

Diverse and Resilient Youth Program, to improve the quality of services to gay and lesbian young people.

Greater Milwaukee Committee
\$10,000, Milwaukee, WI

Funding to hire a facilitator and for completion of a strategic plan for the Milwaukee Public Schools.

Greater Milwaukee Foundation
\$35,000, Milwaukee, WI

For the Violence-Free Zone, a project involving the Latino Community Center and Running Rebels, coordinated nationally by the Center for Neighborhood Enterprise.

InHealth Wisconsin
\$35,000, Milwaukee, WI

'It's Time! Youth Peer Education and Mental Health Project' and request for a separate planning grant to implement the work of a national summit on teacher training and identification of mental health challenges in the classroom.

Ko-Thi Dance Company
\$15,000, Milwaukee, WI

Transition support and expanded business planning for the organization's efforts to improve administration and secure a permanent home for the dance and arts education facility.

Ko-Thi Dance Company**\$1,500, Milwaukee, WI**

DrumTalk brochure promoting arts residencies and after school focused services.

Milwaukee Public Schools Foundation, Inc.**\$3,000, Milwaukee, WI**

Year-end gift for Washington High School of Expeditionary Learning.

Milwaukee Art Museum**\$16,000, Milwaukee, WI**

For Art Aloud, a joint effort with the Milwaukee Public Library that promotes reading, art appreciation and a more diverse audience for the museum.

Milwaukee Public Library Foundation**\$48,025, Milwaukee, WI**

For the Summer Reading Program.

Milwaukee Public Library Foundation**\$13,794, Milwaukee, WI**

Independent Evaluation of the 2007 Summer Reading Program.

Milwaukee Renaissance Academy**\$3,000, Milwaukee, WI**

Year-end gift.

Milwaukee Repertory Theater, Inc.**\$3,000, Milwaukee, WI**

Year-end gift for Middle and High School education programs.

Milwaukee Urban League**\$25,000, Milwaukee, WI**

Project ALIVE will create an expanded community movement to increase student participation in the Campaign for African American Achievement, the belief that youth can achieve, be well educated, and become economically self-reliant.

Mother Kathryn Daniels Conference Center (MKDCC)**\$40,000 over 2 years, Milwaukee, WI**

To expand the Argilla Youth Development Program, which provides character development training and employment opportunities for Milwaukee youth.

Neighborhood House of Milwaukee \$25,000, Milwaukee, WI

Early Childhood Services/Family Home-Based Literacy Program - a project of the International Learning Center.

**New Concept Self Development Center****\$1,000, Milwaukee, WI**

Milwaukee Fatherhood Initiative - 2007 Fatherhood Summit.

Next Door Foundation, Inc.**\$3,000, Milwaukee, WI**

Year-end gift for Books for Kids program.

Safe & Sound**\$23,000, Milwaukee, WI**

KaBoom! Milwaukee WE Play! Workshop Entirely on Play.

Samaritan Project Inc.**\$3,000, Milwaukee, WI**

Year-end gift for Children's Tutorial Project.

Urban Day School

\$40,000, Milwaukee, WI

Several different projects were supplied: the Advocate Program, Music Program, and a Planning Conference.

Urban Ecology Center

\$45,000 over 2 years, Milwaukee, WI

For Neighborhood Environmental Education Programs.

Urban Ecology Center

\$3,000, Milwaukee, WI

Year-end gift.

West Allis/West Milwaukee Recreation & Community Services Department

\$20,000, West Allis, WI

The Irving School Special Needs Accessible Playground, designed for special needs students as well as the general population.

Wisconsin Foundation for Independent Colleges, Inc.

\$25,000, Glendale, WI

Improve working partnerships with neighborhood organizations and design and launch math and science component of CR-21 with MCW.

Woodland Pattern Book Center

\$1,000, Milwaukee, WI

Fees to hire an evaluation consultant and a work plan to complete a logic model, evaluation survey and to assess their youth writing and literacy programs.

Woodland Pattern Book Center

\$15,000, Milwaukee, WI

For the Urban Youth Literary Arts Program, an enhanced community education effort that supports writing as a creative activity, through poetry and other projects, both in the summer and throughout the school year.

AGING & ELDERS

Badger Association of the Blind

\$15,000, Milwaukee, WI

For an expansion of vision rehabilitation services for seniors.

Layton Boulevard West Neighbors

\$40,000 over 2 years, Milwaukee, WI

Support for the Senior Housing and Neighborhood Connection Program, that focuses on providing seniors with tools to remain in their home and to play an active role in the community.

Legal Aid Society of Milwaukee

\$30,000, Milwaukee, WI

For support of the HELP (Helping the Elderly with Legal Problems) Program.

Milwaukee Aging Consortium

\$35,000, Milwaukee, WI

For the Senior Housing Project.

Rebuilding Together Greater Milwaukee

\$15,000, Milwaukee, WI

Expansion of home repair program, which provides free home repairs to low-income homeowners with physical disabilities and/or are over 60 years old.

United Community Center

\$25,000, Milwaukee, WI

For the Latino Geriatric Center, a model project serving older Hispanics in the Milwaukee area.

UWM Foundation

\$800, Milwaukee, WI

For costs associated with Housing Charette event.

UWM Foundation

\$5,000, Milwaukee, WI

For continuation of the Senior Housing Charette initiative with an emphasis on Public Policy and Capacity-Building for improved elder housing design.

HEALTH

Columbia St. Mary's Foundation

\$30,000, Milwaukee, WI

For the Madre Angela Dental Clinic, to support expanded dental care for low-income residents of the City.

CORE/EL Centro

\$3,000, Milwaukee, WI

Year-end gift.

Family House Inc.

\$15,000, Milwaukee, WI

For the Men with Vision Program which provides peer support, mentoring and opportunities for community services for young males in the Family House target area.

Gilda's Club

\$3,000, Milwaukee, WI

Year-end gift.

Grand Avenue Club, Inc.

\$20,000, Milwaukee, WI

Learning and Earning: Young adult supported work program.

Hope House of Milwaukee

\$3,000, Milwaukee, WI

Year-end gift for the organization's work in serving the homeless.

House of Peace

\$25,000, Milwaukee, WI

For capital support of the Make Room... for Hope Campaign, that will provide assistance during and after the building renovation and expansion project for a wide variety of basic human needs programs on Milwaukee's northwest side.

Meta House, Inc.

\$3,000, Milwaukee, WI

Year-end gift.

MilwaukeeCares, Inc.

\$30,000, Milwaukee, WI

For its efforts to expand physician involvement and access to specialists, in conjunction with the Milwaukee County Medical Society and the Milwaukee Free Clinic Coalition. The grant will also enable an expanded availability of free or deeply discounted prescription medicines to patients served through MilwaukeeCares.

Milwaukee Rescue Mission

\$3,000, Milwaukee, WI

Year-end gift.

S.E.T. Ministry

\$40,000, Milwaukee, WI

For the Emergency Department Community Case Management Program, a collaborative effort of Wheaton Franciscan/St. Joseph's, S.E.T. and Assurant Health Foundation.

Transitional Living Services

\$60,000 over 2 years, Milwaukee, WI

For the Milwaukee Crisis Resource Center, serving adults with serious mental illness, substance abuse and co-occurring disorders who are experiencing psychiatric crises. The project is an outgrowth of the Mental Health Task Force and has received national demonstration funding from the Robert Wood Johnson Foundation.

Transitional Living Services

\$15,000, Milwaukee, WI

For marketing and expansion of the TLS Community Pharmacy, a distinctive effort to provide persons with severe mental illness with suitable medications; the project will increase services and link TLS with allied organizations to expand the pharmacy's reach into the community.

Warmline, Inc.

\$3,000, Milwaukee, WI

Year-end gift.

Wisconsin Center for Nursing, Inc.

\$60,000 over 2 years, Milwaukee, WI

For the “Raising the Bar” project to demonstrate new methods of educating and employing public health nurses. The award is part of a national application to the Robert Wood Johnson Foundation.



Wisconsin Center for Nursing, Inc.

\$142,000, Milwaukee, WI

Awarded in partnership with the Robert Wood Johnson Foundation, Northwest Health Foundation II, Northwestern Mutual and Greater Milwaukee Foundations to launch the Raising the Bar project, that will expand and diversify the public health nursing workforce in WI. The Foundation is playing the lead role in coordinating the national and local funding for this valuable effort. There is a lengthy roster of University, public health and community partners engaged in this effort over the next two years.

Wisconsin Council on Children and Families

\$35,000, Madison, WI

Ready, Set, Grow Technical Assistance and Training Project – 3rd Year support for the Council’s efforts to build an area “Brain Team” to stimulate conversation and action among child care and health providers on healthy brain development and to provide technical assistance to selected child care providers on stimulating healthy brain development among very young children.

HEALTH EDUCATION

Aurora Psychiatric Hospital

\$20,000, Milwaukee, WI

For Kradwell School’s Playground and Outdoor Classroom Project that will expand recreational and educational opportunities for this distinctive K-12 school.

Wisconsin Center for Nursing, Inc.

\$30,000, Milwaukee, WI

For continued program and operations support for the Center, a confederation of schools of nursing, nursing associations and health systems.

Sojourner Truth House

\$30,000, Milwaukee, WI

For a recidivism tracking and continuing education program for those who have completed the Batterer’s Anonymous program.

CIVIC AND GOVERNMENTAL AFFAIRS

Walnut Way Conservation Corp.

\$1,000, Milwaukee, WI

For the Family Self-sufficiency Series (for families in a targeted neighborhood).

Donors Forum of Wisconsin

\$15,000, Milwaukee, WI

To support the work of the Forum’s Strategic Plan and efforts to improve the effectiveness of private philanthropy throughout the region.

Eisner American Museum of Advertising & Design
\$1,000, Milwaukee, WI

For support of a 6-month exhibit focusing on nonprofit and public service advertising. "Giving Back". Also for seminar on advertising for nonprofit Executives and Boards.

Greater Milwaukee Foundation/ Nonprofit Management Fund
\$25,000, Milwaukee, WI

To support the *BoardStar* project increasing the involvement and capability of Boards of Directors of nonprofit organizations in the greater Milwaukee area.

Greater Milwaukee Foundation/ Nonprofit Management Fund of Milwaukee

\$65,000, Milwaukee, WI
The Nonprofit Management Fund serving Milwaukee, Ozaukee and Washington Counties. The fund provides small technical and management assistance grants to small and medium-sized organizations to improve their business, governance and financing activities

Greater Milwaukee Foundation/ Nonprofit Management Fund of Waukesha

\$10,000, Milwaukee, WI
The Nonprofit Management Fund of Waukesha County, which provides technical and management assistance grants to Waukesha-County based organizations

Greater Milwaukee Foundation
\$2,500, Milwaukee, WI

For continued funding for the Report Card on Charitable Giving, the annual benchmark report on philanthropy in the metropolitan area.

Marquette University Law School
\$11,000, Milwaukee, WI

A planning grant for efforts which link law enforcement, court and community service organizations in an allied effort to replicate and adapt a violence-reduction project successful in several other communities.

Milwaukee Public Museum
\$100,000, Milwaukee, WI

For the Survival to Revival Campaign, which was sparked by a challenge grant from the Lynde and Harry Bradley Foundation and an anonymous donor to help the Museum regain financial solvency and the platform from which to launch enhanced programs.

Milwaukee Turners
\$15,000, Milwaukee, WI

For the 4th Street Forum, the civic and civil conversations, broadcasting and distribution of local and national expert's views on a wide range of challenges facing Milwaukee.

Public Policy Forum
\$50,000 over 2 years, Milwaukee, WI

Toward Higher Quality Childhood Education: An Imperative for the Regional Economy, a study analyzing the costs and benefits to our region of a best quality early childhood education system; the research will also create a means to measure current and future investments and their impact on quality child development programs.

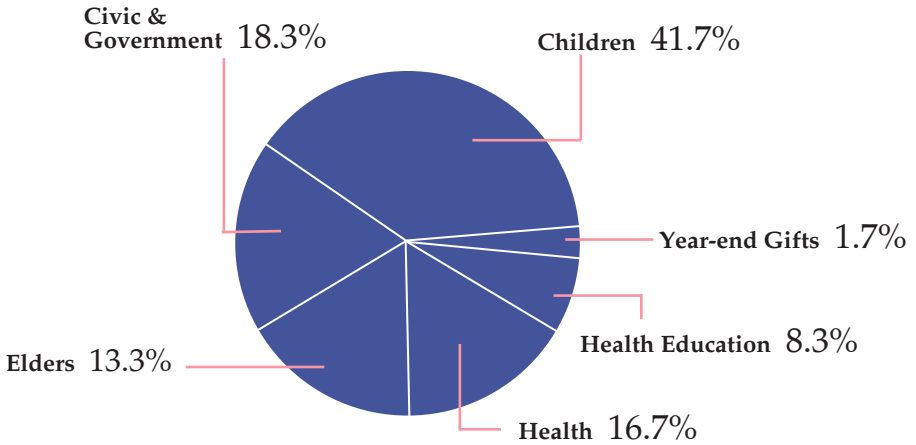
UWM Foundation
\$50,000, Milwaukee, WI

For the Helen Bader Institute for Nonprofit Management – ENTECH, a model University effort involving students, campus resources and philanthropic support to enhance the nonprofit sector's use of technology.

2007 Grant Request Analysis

2007 Grants by Charitable Field

During 2007, the Trustees approved 59 grant requests, The year-end gifts supported 14 organizations, reflecting a broad spectrum of Foundation interests.



Charitable Field	Number of Grants	% of Grants	Grant Dollars	% of Grant Dollars
Children	25	41.7%	\$556,319	30.8%
Civic & Government	11	18.3%	\$344,500	19.1%
Health *	10	16.7%	\$579,000	32.1%
Aging & Elders	8	13.3%	\$165,800	9.2%
Health Education	5	8.3%	\$116,000	6.4%
Year-end Gifts **	1	1.7%	\$42,000	2.3%
Grand Total	60	100.0%	\$1,803,619	100.0%

Average grant size \$27,327.

* The Health grantmaking includes a \$142,000 award in collaboration with several other funders (see Wisconsin Center for Nursing, Inc. grant on page 13.

** Year-end Gifts are grouped and counted as one.

Projects of Note

As the report shows, 2007 was a year of active grantmaking. In addition to applications and grants there were several other highlights in 2007.

■ Public Health and Diversity in Nursing

Local foundations, schools of nursing, public health departments and community clinics joined the Partners Investing in Nursing (PIN) initiative to improve the development, training and placement of public health nurses. Public health nurses work in critical areas of care ranging from school health and immunizations to teen pregnancy prevention. McBeath played a lead role in attracting, jointly funding and supporting development of a 2-year project. Partners include Robert Wood Johnson and Northwest Health Foundations, Northwestern Mutual and Greater Milwaukee Foundations and the Wisconsin Center for Nursing. For more information, visit www.wisconsincenterfornursing.org or contact Paula Lucey or Lea Acord at the WI Center for Nursing, (414) 288-0658.

community partners participated via focus groups and a weekend design charette where teams of architects and students created bold ideas for advancing older adult quality of life and community development. For more information visit, www.uwm.edu/SARUP or contact Gerald Weisman at UW-Milwaukee, (414) 229-3815.

■ Aging in Community – Housing Design

Together with a group of philanthropic, academic and community partners, the Foundation envisioned a new era of housing for older adults. UW-Milwaukee's School of Architecture and Urban Design led an "ideas competition" to create new ideas for design that support a high quality of life and community development. Eight architectural firms, 100 neighborhood residents and other

■ Enriching Play in Milwaukee

The Foundation's interest in children includes a focus on projects that build or refurbish playgrounds in Milwaukee. A frequent national partner is KABOOM!, that connects community projects with national and local partners. After neighborhood idea-generation, including a session with area children, a playground "build" is implemented using over 100 volunteers. It begins in the early morning and concludes with the ribbon-cutting in the afternoon. With program partner, Safe & Sound, the Foundation underwrote a day-long KABOOM! training event entitled WE PLAY in Milwaukee. Seventy organizations, including nearly 20 from WI, participated and the dividends, in terms of improved applications are apparent.

Financials

2007 Financial Report

Statements of Financial Position December 31, 2007 and 2006

Assets

	<u>2007</u>	<u>2006</u>
<i>Cash</i>	\$ 23,657	\$ 1,070
<i>Investments, at market:</i>		
Common stock	-	-
Fixed Income Common Trust Funds	4,371,181	3,511,872
Mutual Funds	5,164,960	6,634,813
Short-Term Investment Fund	251,702	267,500
	<hr/> 9,787,843	<hr/> 10,414,185
<i>Other Assets:</i>		
Grants receivable	165,000	-
Accrued investment income	22,527	119,527
Prepaid expenses	1,120	1,274
Total other assets	<hr/> 188,705	<hr/> 120,801
TOTAL	<u>\$ 10,000,205</u>	<u>\$ 10,536,056</u>

Liabilities & Net Assets

Liabilities:

Accounts payable	\$ 3,267	\$ 688
Grants payable	327,000	149,500
Deferred wages	8,000	15,687
Accrued retirement	31,148	34,928
Excise taxes payable	5,217	1,504
Total liabilities	<hr/> 374,632	<hr/> 202,307

Net Assets:

Temporarily restricted	9,625,573	10,333,749
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TOTAL **\$ 10,000,205** **\$ 10,536,056**

The financial information on pages 17-18 is a portion of an independent audit conducted by Reilly, Penner & Benton LLP. A copy of the full audit may be reviewed at the Foundation's offices, and a copy is on file at the Funding Information Center at Marquette University.

Statements of Activities December 31, 2007 and 2006

	<u>Unrestricted</u>	<u>Temporarily Restricted</u>	<u>2007 Total</u>	<u>2006 Total</u>
<i>Investment Income:</i>				
Interest	\$ 159,542	\$ -	\$ 159,542	\$ 153,337
Dividends	51,129	-	51,129	61,384
Net realized gain on sale of investments	-	972,222	972,222	661,017
Unrealized gain (loss) on investments	-	(222,657)	(222,657)	207,917
<hr/>				
Totals	210,671	749,565	960,236	1,083,655
Contributions	-	330,000	330,000	-
Other Income	3,011	-	3,011	760
Net assets realized from restrictions	1,787,741	(1,787,741)	-	-
<hr/>				
Total revenues	2,001,423	(708,176)	1,293,247	1,084,415
Grants	1,804,619	-	1,804,619	1,325,650
Grants cancelled	(1,000)	-	(1,000)	(25,000)
Management & general	186,563	-	186,563	181,534
Federal excise tax	11,241	-	11,241	3,404
<hr/>				
Total expenses	2,001,423	-	2,001,423	1,485,588
<hr/>				
Change in Net Assets	-	(708,176)	(708,176)	(401,173)
Net Assets, beginning of year	-	10,333,749	10,333,749	10,734,922
<hr/>				
Net Assets, end of year	\$ -	\$9,625,573	\$9,625,573	\$10,333,749

Foundation

2007 Foundation Board & Staff

TRUSTEES:

Steven J. Smith, *Chair*

Sara E. Aster, *Vice Chair*

P. Michael Mahoney, *Secretary*

Mary T. Kellner

Gregory M. Wesley

CORPORATE TRUSTEE:

U.S. Bank, NA

STAFF:

Scott E. Gelzer, *Executive Director*

Laura Mullen, *Executive Assistant*



Back row, standing left to right: P. Michael Mahoney, Scott Gelzer, Gregory M. Wesley, Steven J. Smith
Front row, seated left to right: Mary T. Kellner, Sara E. Aster and Laura Mullen
John E. Kimpel, Photographer.

Photograph of Faye McBeath in background

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