



Oshkosh Rotary Club

Endowment Fund

Oshkosh Area Community Foundation

Annual Report to the Club 2017-2018

Oshkosh Rotary Club Endowment Fund

Oshkosh Area Community Foundation

Committee Membership 2018-19

Bill Bracken – Chair 2018-2019

John Vette (for Sherry Lynch)

David Hayford

Karen Schibline

Lori Renning

John Fuller

Christy Marquardt

Dick Campbell – At large member

Dave Sennholtz – At large member

Jim Stahl - Club Treasurer

Michael Cooney – Fund Secretary

Oshkosh Rotary Club Endowment Fund

Oshkosh Area Community Foundation

Current Balances:

- **General Fund: \$96,856.89**
 - Leona Stapel CNA Scholarship fund
- **Oshkosh Local Projects Fund: \$21,047.96**
 - Project Peru - disbursed
 - Philippines Education Fund - collecting
 - Bonus 10 Fund – moved to independent status
 - Afghan Education Fund – moved to independent status

Oshkosh Rotary Club Endowment Fund

Oshkosh Area Community Foundation

Grants – November 6, 2018 Meeting

- Philippines Education Fund - \$1,000
Requested by David Sennholz
- Basic Rural Education,
KwaZulu-Natal South Africa - \$2000
Requested by Cathy Zimmerman
- Farmers Market Bonus 10 - \$3,000
Requested by Michael Cooney
- CNA Scholarship Fund - \$2,903.82
Requested by Jim Stahl

Oshkosh Rotary Club Endowment Fund

Oshkosh Area Community Foundation

General Fund:

Gifts:	\$162,391.16
Non Gifts:	\$10,367.12
Grants Paid:	\$110,983.32
Balance:	\$96,856.89

Local Projects Fund:

Gifts:	\$34,156
Non Gifts - na	
Grants Paid:	\$27,222
Balance:	\$21,047

Peru Fund:

Gifts:	\$96,556
Non Gifts	\$ 24
Grants Paid:	\$96,251
Balance:	\$ 70

Oshkosh Rotary Club Endowment Fund

Oshkosh Area Community Foundation

- \$303,497.70 Total Gifts for the life of the funds(3)
- \$234,456.37 Grants Paid over the life of the funds
- \$117,975.17 Current Fund Balance

2003 the Endowment Fund moved to the foundation.

- General Fund: \$29,733
- Local Projects Fund: \$10,987
- Peru Fund: \$800

Funds total: \$41,520

Oshkosh Rotary Club Endowment Fund

Oshkosh Area Community Foundation

- *Supporting Rotarian Sponsored Projects*
- *Adjunct to the club's service budget*
- *Honoring doner intent*
- *Providing Tax deductions for gifts*
- *Providing the Oshkosh Area Community Foundations fund management and market based growth.*

Please consider making the endowment fund part of your charitable giving and estate plan.

SNAP Incentive Program 2014 – 2018

Bonus 10 Match & Discover the Market

2014 – No SNAP Incentive Program

SNAP Benefits	\$7,540
Swipes	380
From Vendors:	\$6,198

2015 – First year of program

SNAP Benefits	\$12,579
Swipes	790
Bonus 10	\$ 7,430
From Vendors	\$18,844

2016 – Discover the Market program added.

SNAP Benefits	\$ 9,872
Swipes.	720
Bonus 10	\$ 6,890
Discover the Market	\$ 1,379
From Vendors	\$16,775

2017 – Additional partner agencies added to program

SNAP Benefits	\$ 8,636
Swipes	692
Bonus 10	\$ 6,600
Discover the Market	\$ 6,764
From Vendors	\$19,058

2018 – Increased Boys & Girls Club program

SNAP Benefits	\$11,194
Swipes	943
Bonus 10	\$ 9,340
Discover the Market	\$ 1,744
From Vendors	\$23,548