# 2023 Annual Report



# **ZONTA FOUNDATION, INC**



# ZONTA FOUNDATION, INC <u>Mission</u>

Zonta Foundation, Inc. was established on January 25, 1957, to serve the mission of the Zonta Club of Milwaukee by raising and distributing charitable funds. Decisions regarding charitable gifts to Zonta Foundation, Inc. are made by the Foundation Board of Directors. Zonta Foundation, Inc. has been granted 501(c)3 status by the Internal Revenue Service<sup>1</sup>.

### **History**

In the 1950s, the Zonta Club of Milwaukee was concerned about affordable housing for Seniors and worked to build Zonta Manor -- a \$1.3 million passive solar apartment building on East Cambridge Avenue in Milwaukee, WI. The building was designed by a female engineer who was a member of the Club. Due to the hurdles experienced by the Club while raising funds for Zonta Manor, the Club established Zonta Foundation, Inc. on January 25, 1957, to be the charitable arm of the Club. All members of the Club are members of Zonta Foundation, Inc. The building was sold in 1967.

## **Practices**

Zonta Foundation, Inc., a non-profit, exists to raise and disburse funds. Funds are raised from three sources: net proceeds from annual fund-raising events, donor gifts, and interest/dividends on investments.

Consistently over time, and in accord with Zonta International guidelines, one-third of non-institutional unrestricted funds raised are used to support Zonta International programs, including but not limited to international service projects, violence prevention initiatives, and scholarships. The remaining funds are used locally by the Club to fund grants, scholarships, and service and advocacy projects designed to empower women and girls.

Funding decisions regarding grants to local non-profit agencies are made based on non-profit status, alignment with the goals and objectives of Zonta, and the nature of the program's impact on the lives of women and girls in the greater Milwaukee area.

Grants generally have ranged from \$1000 to \$5000, in single or multi-year commitments. Through 2019, the Foundation Board solicited and reviewed agency applications in the fall/winter and presented grants at the annual spring fashion show fundraiser. In 2020, due to the coronavirus, we did not hold our fashion show fundraiser in spring, but we did disburse the funds raised the previous year to the chosen agencies. Beginning in 2021, applications were solicited in the spring, and grants were made at the fashion show fundraiser now held in the fall. Grantees are asked to provide year-end reviews of the program or project being funded.

The Foundation Board approves funding for local scholarships in advance of the scholarship year. The Club's Scholarship Committee manages the application and selection process. Funding for local service and advocacy projects are approved on an ad hoc basis, as opportunities and needs arise.

The Zonta Foundation, Inc. Board has been guided in its activities and decisions by documents currently in place regarding its mission, by-laws, and investment and disbursement policies. There is no paid staff.

<sup>&</sup>lt;sup>1</sup>Meaning gifts of the Foundation are tax-deductible

April 23, 2024

Dear Members and Friends of Zonta,

The Zonta Club of Milwaukee marked 97 years of dedicated service in 2023. During this past year, we have enthusiastically embraced our mission of "building a better world for women and girls" by supporting local and international projects/initiatives through service, financial contributions, grants, scholarships, and in-kind donations.

We disbursed \$33,044 to support local agencies, local scholarships, and the Zonta Foundation for Women, raised via our Fall Fashion Show and other donations. We received 8 completed applications and selected 7 agencies to receive \$22,000 in grant money in 2023. We also supported two local \$1,000 scholarships and donated \$9044 to the Zonta Foundation for Women.

In 2023, the Club continued its partnership with Neu-Life Community Development, an agency that provides youth development programming for the children of the Lindsay Heights neighborhood. This year, club activities included donating school supplies and 50 backpacks for elementary and middle school youth.

The Club also expanded service and support outreach to include three additional local nonprofit agencies whose mission, vision, and service needs aligned with Zonta's mission, selected agencies:

- Exploit No More (Freedom House) Provides support to victims of sex trafficking in a case management group home model. Club support included:
  - Gardening project (purchased, installed, and planted raised garden beds), provided dinner for residents, did fall garden cleanup, and ended the year with a holiday donation of sheets, pillows, and blankets.
- Allies for Teens in Foster Care Supplement educational and social needs for teens in foster care and group home settings.
  - In November and December, the Club donated gift cards, hats, gloves, slippers, and blankets.
- Cathedral Center Provides support to unaccompanied women and families with children experiencing homelessness, with emergency shelter and flexible housing for up to 2 years.
  - Purchased, prepared, delivered, and served a meal for up to 50 individuals with an additional 50 sandwiches prepared for the next day's meal.

On behalf of the members of the combined Zonta Club of Milwaukee and Zonta Foundation, Inc., we sincerely **Thank you** for your past support and ask for your continued support of our mission to build a better world for women and girls in the Greater Milwaukee area and throughout the world.

Sincerely,

Joann Harris-Comodore, President Zonta Club of Milwaukee

Donna Kahl-Wilkerson, President Zonta Foundation, Inc.

#### 2023 ACCOMPLISHMENTS

- Grants: The Foundation Board reviewed 8 applications for grants from local non-profit agencies.
   After careful review and consideration, the Board decided to award \$22,000 in grants to 7 worthy agencies to fund specific programs/services consistent with Zonta's mission to empower women and girls.
- Local Scholarships: The scholarship committee solicited applications and awarded two \$1000 scholarships, the Young Women in Public Affairs and the Jane M Klausman Women in Business awards.
- Donations to Zonta International Foundation: Consistent with past practices, the Foundation Board voted to contribute 1/3 of the funds raised at the 2023 Fall Fashion Show Fundraiser, of \$9044, to the Zonta Foundation for Women.
- Investment Policy: The Zonta Foundation Board updated its investment policy to add diversification and reflect a slightly more conservative risk profile. We turned over the investment portfolio in line with the new policy. The full Board meets annually with our Baird investment advisor.

#### Service Projects:

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## **2023 GRANT RECIPIENTS**

**Total Local Grants: \$22,000** 

#### **Exploit No More Freedom House \$5,000**



**Exploit No More**'s mission is to respond to the impact of sex trafficking EXPLOIT NO MORE through community education, housing, and supportive services. Exploit No More's vision is to be dedicated to seeing all survivors of sex

trafficking treated with dignity and have access to safe housing, supportive services, and the ability to move forward to work toward their goals. Funds from the Zonta Foundation will help them continue their 24/7 operations of Freedom House, a remodeled apartment building that provides a warm and safe bedroom to sleep in, good food to eat, a hot shower, laundry, personal care items, and individualized case management services. Guests at Freedom House regularly say that staying there and benefitting from the services "sayed their life."

#### Milwaukee Muslim Women's Coalition \$4,000



Milwaukee Muslim Women's Coalition's mission is to lead positive community change through advocacy, dialogue, education, and outreach, using faith-based values to ensure dignity and equity for all. Their vision is a world that nurtures women and girls and empowers them to reach their fullest potential. Funds from the Zonta Foundation will support their Girls Hoops Club, an important addition to their

Youth Leadership Program. Sports participation is known to increase confidence, improve health, and enhance academic success. The Girls Hoops Club will further support the mental health and physical well-being of Muslim girls and young women who are part of Milwaukee's immigrant and refugee communities.

#### Sojourner \$3,000



Sojourner Family Peace Center's mission is to transform lives impacted by domestic violence. Their core program areas focus on crisis response, systems advocacy, and healing services. They strive to ensure the safety of survivors of domestic violence and provide a pathway out through opportunities to make positive and lasting changes for survivors and their children. Funds from the Zonta

Foundation will support their Healing Services, which provides resources, support, and assistance to achieve personal goals and self-sufficiency. Specialized programming is designed for children and teens who have witnessed family violence. Healing Services offers referrals to survivors in many forms related to education, employment, financial empowerment, and wellness.

#### Core El Centro \$3,000



CORE El Centro's mission is to enhance the health and wellness of our communities by offering integrative natural health services focused on empowerment, healing, safety, and reducing barriers to access. CORE El Centro is

a grass-roots organization by and for Latinx women and families in Milwaukee's nature-deprived, low-income, underserved neighborhoods. Low-income and minority communities in Milwaukee experience systemic inequities in health care, higher exposure to health threats, and worse health outcomes. Funds from the Zonta Foundation will support women in low-income households accessing an array of Trauma & Healing services, including holistic natural therapies, health navigation, and health and wellness education and fitness classes.

#### Milwaukee Women's Center \$3,000



The **Milwaukee Women's Center**'s mission is to provide innovative, culturally competent, holistic care. The agency's vision is to serve and support individuals and families so they can live their lives free from domestic violence, addiction, and trauma. Funds from the Zonta Foundation will support the Domestic Violence Emergency Shelter Program serving women and their children who

have been affected by domestic violence in Milwaukee County. The Shelter provides safe housing and supportive services, including counseling and support groups, safety planning, and comprehensive case management to address housing and other basic needs. In addition, children participate in age-appropriate trauma-informed programming to increase their awareness, prevent the cycle of domestic violence, and to increase their safety planning and self-esteem.

#### The Cathedral Center \$3,000



The **Cathedral Center**'s mission is to provide a safe environment for women and families while working to end homelessness—one life at a time. Funds from the Zonta Foundation will support their employment program called the Women's Independence Program (WIP). Its purpose is to empower women and parents who are facing a housing crisis to achieve their fullest potential. WIP weaves professional case management, a stable and supportive living environment,

courses on work readiness and personal growth, meaningful incentives, and access to a network of actively engaged employer partners. With a focus on employment, WIP is designed to improve the economic status of women, resulting in increased income, long-term independence, and financial stability.

#### **Awesome Young Authors \$1,000**



**Awesome Young Authors** has a mission to empower and encourage children in their literacy and literary journey by providing various programs and initiatives. They believe that education can be a powerful catalyst for change. Their Empowerment Through Education Program aims to provide women and girls with access to quality education and development opportunities to overcome barriers, gain independence,

and contribute to the socio-economic development of their communities. Funds from the Zonta Foundation will improve the Program by expanding outreach and providing scholarships, improving the quality of educational resources, training materials, and facilities, and forging new partnerships with schools, vocational training centers, and community organizations.

### **2023 SCHOLARSHIPS**

To encourage and support women in pursuing careers and leadership roles in public affairs, business, and the STEM (science, technology, engineering, and math) fields, the Zonta Club of Milwaukee offered three scholarships in 2023:

**Young Women in Public Affairs Scholarship** of \$1,000 for young women between the ages of 16 and 19 who demonstrate a commitment to volunteerism, evidence of leadership, and a dedication to empowering women – with the opportunity for international awards as well.

**Jane M. Klausman Women in Business Scholarship** of \$1,000 for women pursuing an undergraduate or master's degree in business who show outstanding potential in their chosen field – with the opportunity for district and international scholarships as well.

**Women in STEM Scholarship** of \$1,000 for college juniors and seniors majoring in science, technology, engineering, or mathematics who show great promise in their field of study.

Zonta Club of Milwaukee scholarships are open and promoted to students in the six-county greater Milwaukee metro area (Milwaukee, Waukesha, Washington, Ozaukee, Racine, and Kenosha counties).

#### 2023 Scholarships to local recipients were:

#### Young Women in Public Affairs (YWPA) - \$1,000

**Avanti Kekane** was the 2023 Zonta Club of Milwaukee's Young Women in Public Affairs Scholarship recipient. Avanti aspires to be an Environmental Attorney and plans to continue her education at UW-Madison. She would like to analyze environmental policy and resolve legal problems to minimize the negative human impacts on the environment. She aims to be a bridge between scientists and the public to help everyone reach the common goal of sustainability.

Avanti was an active member of Brookfield Central High School's Key Club as well as serving as the Lieutenant Governor for the Wisconsin and Upper Michigan Key Club Board. She was also an executive board member of her high school's Spanish Honors Society.

Additionally, Avanti was a volunteer tutor at a non-profit organization called Global Nagri. She had been tutoring a girl from a village in India to read and speak English over Zoom. Avanti was also a student mentor for new volunteers joining the program.

#### Jane M. Klausman Women (JMK) in Business Scholarship

There were no applications submitted for the Zonta Club of Milwaukee's JMK scholarship, so a scholarship was not awarded in 2023.

#### Zonta International Women in STEM Scholarship - \$1,000

Valentina Romero-Moran was the 2023 Zonta Club of Milwaukee's STEM Scholarship recipient. As an architecture student with a deep passion for sustainability and a strong belief in community and people-centered design, her academic and professional goals revolved around creating innovative and environmentally conscious spaces that positively impact individuals and their surroundings. She passionately believes that architecture can shape our lives and that humans and nature can learn how to co-exist.



Valentina's goals are her dreams, and she wants to join the 1% of Latinas who are licensed architects. She actively seeks opportunities to expand her knowledge and skills beyond the classroom by attending lectures and being an active participant and now officer of the Society of Hispanic Professional Engineers. These experiences have broadened her understanding of sustainable design principles and have practical insights that she can apply in her future career.

# 2023 CONTRIBUTIONS ZONTA FOUNDATION FOR WOMEN



The Milwaukee Club's Zonta Foundation donates 1/3 of unrestricted funds raised by Club fundraisers to the Zonta Foundation for Women. In 2023, all Milwaukee Zonta Foundation Inc. donations were designated to the Rose Fund.

Rose Fund \$9044

The Rose Fund provides additional support to Zonta Foundation for Women programs not fully supported by fund-specific contributions and enables the Foundation to support new program development, like the Women in STEM pilot program.

#### **Zonta International Service Projects**

Zonta International is passionate about providing life-changing opportunities for women and girls through international service. By partnering with agencies of the United Nations and other recognized non-governmental organizations, Zonta has improved women's health, provided better economic opportunities, and prevented gender-based violence in 71 countries. Since our first service project, Zonta has contributed more than US\$35.9 million to our international service projects.

Four projects are currently supported by Zonta Foundation for Women:

#### **Engaging Girls on Climate Change in Madagascar**

Zonta's continued support of this project will allow more than 20,000 girls to realize their right to an education in a secure and protected environment. Zonta contributed \$2,000,000 through UNICEF in 2016-2020 and made an additional commitment to support Phase III with \$500,000 in 2022-2024.

#### Adolescent Girls' Health and Protection in Peru

This project's goal is to improve the capacity of services responding to the health needs of indigenous and rural adolescents, approximately 24,829 girls. Zonta is funding US\$750,000 to UNICEF USA.

# Delivering Survivor-Centered Response to Gender-Based Violence Survivors in Papua New Guinea and Timor-Leste

The objective is for all women and girls to live life free from intimate partner violence. Zonta is funding US\$750,000 to UNFPA.

#### **Ending Child Marriage - A Program to Accelerate Global Action: Phase II**

The Global Programme to End Child Marriage was designed to address the issue over 15 years 2015 through 2030. During this time, the priority remains to engage adolescent girls as key agents of change in 12 countries. The goals of Phase II are to elevate the voice of adolescent girls, increase resources and opportunities for adolescent girls and their families, and enhance legal and political action to prevent child marriage and to support married, divorced, or widowed adolescent girls. Zonta has promised US\$1,200,000 to UNFPA-UNICEF via UNICEF USA.

#### **ZONTA International Scholarships/Fellowships**

Gender Equality in Education is among the primary focuses of Zonta International. It is through education that women and girls are empowered with the necessary tools and resources to make good decisions about their lives and the future of their families. Zonta International sponsors scholarship, fellowship, and award programs to encourage women to pursue careers in the traditionally male-dominated fields of public affairs, business, aerospace, and technology.

#### Amelia Earhart Fellowship



While the number of women in the aerospace industry is increasing, progress is slow. Zonta International established the Amelia Earhart Fellowship in 1938 in honor of legendary pilot and Zontian, Amelia Earhart. Today, the Fellowship of US\$10,000 is awarded annually to up to 30 talented women pursuing Ph.D./doctoral degrees in aerospace-related sciences or aerospace-related engineering around the globe. Women of any nationality pursuing a Ph.D./doctoral degree who demonstrate a superior academic record in the field of aerospace-related sciences or engineering are eligible and encouraged to apply. The Amelia Earhart Fellowship has helped 1,305 women from 77 countries, with scholarships totaling more than \$11.6 million,

to conduct cutting-edge research and pursue their Ph.D./doctoral degrees.

#### Jane M. Klausman Women in Business Scholarship

The Jane M. Klausman Women in Business Scholarship was established in 1998 from a generous bequest by Jane M. Klausman, a member of the Zonta Club of Syracuse, New York, USA. The program operates at the Zonta club, district/region, and international levels, offering 37 international scholarships of US\$5000 annually. Since the program's inception, Zonta has awarded 750 scholarships, totaling more than US\$2 million, to 596 women from 74 countries.

#### Young Women in Public Affairs Award

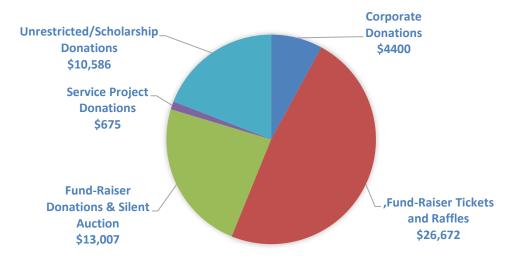
Zonta International established the Young Women in Public Affairs Award in 1990. The award recognizes young women ages 16-19 who demonstrate superior leadership skills as well as a commitment to public service and civic causes. The award encourages recipients to continue their participation in public and political life. 37 international scholarships of US\$5,000 each are awarded each year. Since the program's inception, Zonta has given 1091 awards totaling US\$1,488,750 to 919 young women representing 61 countries.

#### **2023 FINANCIAL SUMMARIES**

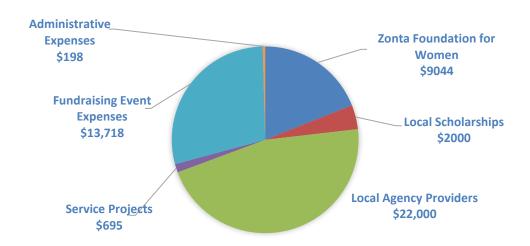
Zonta Foundation, Inc. began its fiscal year on January 1, 2023, with \$203,622.02 in its checking and brokerage (endowment) accounts. It ended the fiscal year on December 31, 2023, with \$242,129.88 in those same accounts. The change represents increased funds raised by the Fashion Show, significantly greater scholarship and unrestricted donations, as well as investment gains.

Funds raised at fund-raising events support the following-year grants to local service providers and our annual gift to the Zonta Foundation for Women. Our endowment supports local scholarships and supplements our local giving, with a prudent 3.5% of the rolling 5-year year-end investment account balance. Unrestricted and scholarship-designated donations are deposited in or transferred to the brokerage/endowment account.

2023 REVENUE: \$55,340



# 2023 DISTRIBUTIONS/EXPENSES: \$47,655



# **ZONTA FOUNDATION DONORS 2023**

#### \$1000 or more

Sandra Miller\*\* Diane Lindsley\*

#### \$500-\$999

Donna Neal\* Margaret Aboaqve\* Pamela Knackert\* Jacqueline Beaudry\* Joni Reese\* Eta Phi Beta Joann Comodore\* Five Nine Bank O'Leary & Anick RCM

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Karen Stasiewicz Julie Hanus Mary Kastelic Ann Brachman Kathy Price

\*Member, Zonta Club of Milwaukee \*\*Member, other Zonta Club

#### **ZONTA FOUNDATION IN-KIND DONORS 2023**

Access Boutique
Jacqueline Beaudry
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**Koss Corporation** 

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**LJO Creations** 

Lynden Sculpture Garden Marriott Milwaukee West

Meijers

Milwaukee Admirals

Milwaukee Downtown, BID #21

Milwaukee Magazine

Milwaukee Symphony Orchestra

MKE Wave (ROC Foundation)

Mimosa

Donna Neal

**Next Act Theatre** 

**Nothing Bundt Cakes** 

Cheryl Nowak

Lynne Oehlke

Oro di oliva

Papa Stache

PRP Wine International

Joni Reese

Ruth Robertson

St Mark's Quilters

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Skylight Music Theatre

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So Solace

Sunset Playhouse

Target

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LJO Creations

Five O'Clock

Slowinski & Associates, S.C.

Central States Insurance Agency, Inc.

# ZONTA FOUNDATION, INC 2023 BOARD OFFICERS & DIRECTORS

## Officers:

Donna Kahl-Wilkerson, President, term expiring 2025

Jacqueline Beaudry, Vice President, term expiring 2024

Donna Neal, Treasurer, term expiring 2026

Margaret Holzbog, Recording Secretary, term expiring 2024

Janet Kloser, Corresponding Secretary, term expiring 2025

#### **Directors:**

Barbara Wyatt-Sibley, term expiring 2024

Debra Koller, term expiring 2026

La Toya Sykes, term expiring 2025

Lynell Meeth, term expiring 2024

Foundation Board terms of office are aligned with Club Board terms, beginning on June 1 and ending on May 31. The Foundation fiscal year, however, is the calendar year, beginning January 1 and ending on December 31. Listed above are all officers and directors whose terms include service from June 2023 – May 31, 2024.

Contact the Foundation Board at <u>zfoundation@zontamilwaukee.org</u>

ZONTA FOUNDATION, INC.

www.zontamilwaukee.org