



## 2017 ANNUAL REPORT

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# MESSAGE FROM THE TRUSTEES

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Argosy Foundation is pleased to release its annual report for the year 2017. This year, the Foundation made \$6,669,441 in grants, a 13 percent increase over 2016.

To say that 2017 was an unusual year would be an understatement. With a new and often unpredictable administration - and a cultural divide seemingly growing by the day - many of our partners found themselves navigating rough waters while trying to attend to the needs of the communities they serve. Many have had to continuously re-strategize their programming in order to account for sudden changes from a variety of fronts - from harsh immigration policies to teen pregnancy prevention program cuts to the loss of environmental protections and more. The steadfastness of our partners in light of numerous challenges is inspiring, and reminds us of the important role each of us has - whether in nonprofit or the private sector - in working towards better communities for every American.

For example, some of our partners working with reproductive health in the South have compensated for the near-absence of medically-accurate information on sexual health for the youth in their communities with technologically savvy solutions aimed at closing this information gap: Teens in Alabama can now text their questions and have them answered by a healthcare professional in an age-appropriate, scientifically accurate way. Community Health Workers in the Texas/Rio Grande border area spent another year knocking on doors, calling residents, and tabling at local community centers to provide information and access to healthcare to an underserved immigrant population increasingly wary of circulating in public areas.

Argosy's reach into more Southern states has also brought new partnerships in STEM, increasing opportunities for children and teens to engage in FIRST robotics programs in Alabama, Louisiana, and Mississippi, in addition to our ongoing support of FIRST across the country and in Canada.

2017 has again brought us opportunities to reflect on the role of civil dialog and authentic exchange of ideas with people of differing viewpoints. From its inception, Argosy Foundation has been guided by a sense of continuous learning and curiosity. This often has translated into explorations into issues, topics, and organizations which at first may seem at odds with some of our personal values and beliefs, yet upon closer examination offer novel approaches to solving problems that affect us all equally.

At times when it seemed like the lack of dialog across the aisle - and even across the many "tribes" we each circulate in - increasingly deprived us of hope for furthering informed ideas and policies, our partnerships with groups doing cross-partisan work on renewable energy in 2017 was an invigorating reminder of what is possible through civil exchange of ideas and a unified focus on what is ultimately best for consumers.

This year, Argosy also made \$200,000 in grants aimed at relief efforts from hurricanes Harvey, Maria, and Irma. Disaster relief grantmaking, while in the past not a prominent program area within the Foundation's grants portfolio, has undergone much growth in the past five years as climate change exacerbates conditions for bigger and more violent storms and wildfires, putting more lives at risk than ever before. Since 2012, Argosy has granted out over a million dollars in emergency relief, and we will continue to respond to these emergencies while tirelessly pursuing climate change mitigation strategies and renewable energy projects elsewhere within our portfolio.

As we look on to the next year, it is our intention to remain committed to continually learning from our partners and fellow funders on how best to leverage philanthropic support in a rapidly changing, sadly fragmented, yet perennially promising world.

Our intention is to not only stay focused on addressing social and environmental problems, but also to draw inspiration from human potential regardless of circumstance, and evoke a sense of humbleness from our vast and beautiful natural world; to remain attuned and responsive to the serious issues affecting our communities, but to also find in optimism a dose of strength to carry on this work.

The Argosy Foundation

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# MISSION, VISION, AND GUIDING VALUES

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## **Mission**

The mission of the Argosy Foundation is to support people and programs that make our society a better place to live. We seek to employ creative and entrepreneurial approaches that help people to help themselves, and become self-sustaining whenever possible. Our intention is to solve systemic problems, build teams and communities, create replicable solutions, and inspire others to contribute in their own ways.

## **Vision**

Argosy's vision is a world where all people are empowered and inspired to make a positive impact on their communities and our world.

## **Guiding Values**

### *Family*

This foundation is formed around a family and is meant to strengthen it. We are committed to encouraging and empowering philanthropy among family members.

### *Fiscal Stewardship*

Argosy Trustees view themselves as stewards of financial and intellectual resources. We expect of ourselves and our partners a disciplined and responsible use of these resources.

### *Decision-Making*

Argosy is deeply committed to informing the decision-making process. Proportionate to their impact, decisions should be the end result of rigorous research, data, and analysis, including best practices, risk contingency, and scenario modeling.

### *Human Resources*

The most important variable in an organization is personnel. We are committed to aggressively seeking out, retaining, and developing an increasingly effective staff. We strongly support our partners in doing the same, particularly in leadership.

### *Method of Engagement*

We seek to make investments that empower through infrastructure and long-term capacity-building. We approach investments with a shared notion of engagement, defined benchmarks, and an exit strategy. We encourage creativity, try to avoid bureaucracy and dependence, and focus on outcomes.

### *Outcomes*

We are committed to continually assessing the effectiveness of ourselves and our nonprofit partners, and equally dedicated to learning from and adapting to the findings. We encourage and support partners to adopt efficient and creative study designs.

### *Volunteer Ethic*

We celebrate and encourage the charitable impulse in society. We believe in interacting with our peers, our partners, our staff, and the community with respect and grace. Where we disagree with others, we try to communicate productively.

### *Collaboration*

What is done well in isolation is often done better in partnership. We seek collaboration and encourage our partners to continually explore potential collaborations when they lead to greater efficiencies, scalability, and pooled-voice advocacy.

### *Curiosity*

We believe that continually examining the world in which we live and the fields in which we work makes us better grantmakers. We are committed to remaining open-minded, sharing knowledge, and learning from our successes and failures.

### *Integrity*

By operating in a manner consistent with our values, we hope our methodology and integrity will earn respect. We value diversity and differences of opinion regarding our decisions and actions. ●

# 2017 FINANCIAL ACTIVITY

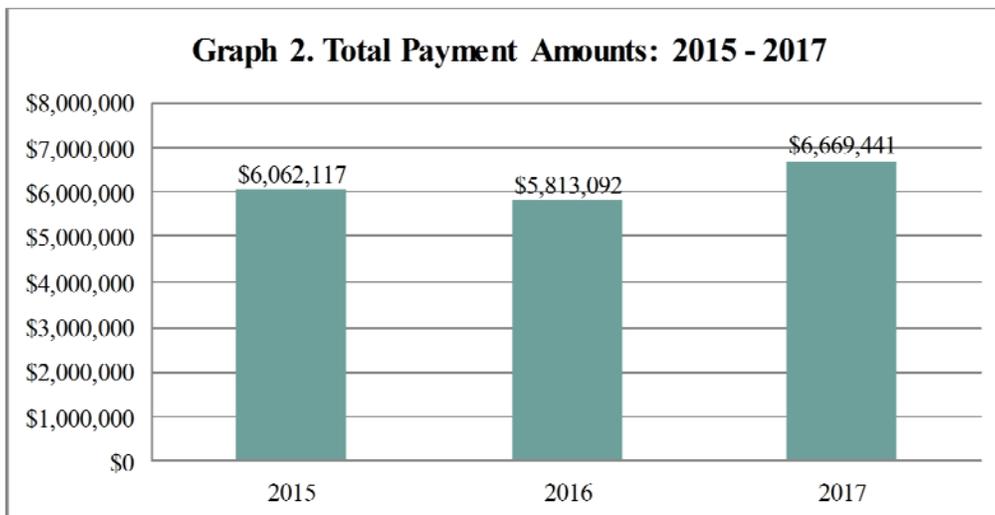
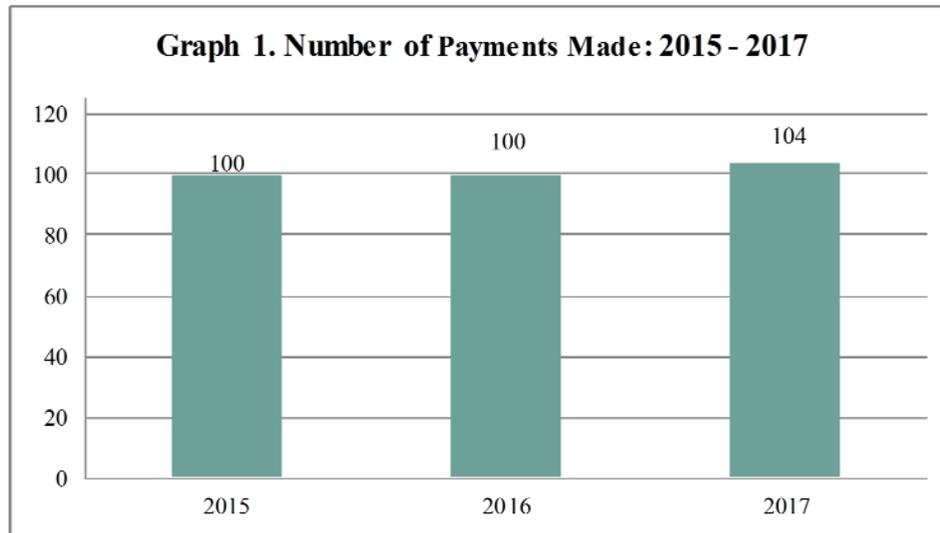
## INVESTMENTS AND EXPENSES

Operating & Administrative Expenses in 2017: \$589,181

Charitable Payments Made in 2017\*: \$6,669,441

\*Grant payments that were made in 2017 may have been approved in previous years, as grants can be paid over several years.

*Please note that Argosy's investments are not always financial. For example, Trustees and staff frequently serve on executive search committees and advisory boards, provide in-house research, and assist with program evaluations.*



# INVESTMENTS BY TYPE AND ORGANIZATION

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The following lists present Argosy's 2017 paid financial investments classified into two categories: grant payments \$20,000 and under, and grant payments over \$20,000.

## INVESTMENT FACTS

- 32 organizations received grant payments in the "\$20,000 and under" category for a total of \$370,623.
- 61 organizations received grant payments in the "over \$20,000" range, totaling \$6,319,533.

*Please note: Some of the organizations listed may have received more than one grant payment, and some payments may fulfill grants approved in previous years.*

## GRANT PAYMENTS \$20,000 AND UNDER

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### **Acumen Fund**

To support the general fund.

### **Arts @ Large**

To support purchase of musical equipment.

### **Attention Homes**

To support programs for the homeless.

### **Bella Voce Women's Chorus of VT**

To support a recording.

### **Bells of Milwaukee**

To support a restoration project.

### **Boulder Shelter for the Homeless**

To support programs for the homeless.

### **Boys & Girls Clubs of Greater Milwaukee**

To support an event.

### **Caras of the Americas**

To support disaster relief efforts in Puerto Rico.

### **CarShare Vermont**

To provide general operating support.

### **Colorado Organization for Latina Opportunity and Reproductive Rights—COLOR**

To support education efforts.

### **Colorado Public Radio**

To provide a matching grant.

### **Communities for a Better Environment**

To support an environmental project.

### **Dancing Without Borders**

To provide general operating support

### **East Troy Middle School**

To support STEM.

### **FIRST**

To support STEM.

### **Hands to Honduras**

To support construction and equipment for a hospital.

### **Intercambio de Comunidades**

To support a program for immigrants.

### **Jewish Museum Milwaukee**

To support a museum exhibit.

### **Keep Greater Milwaukee Beautiful**

To provide general operating support.

### **Lutheran Social Services**

To provide general operating support.

### **Milwaukee Institute of Art & Design**

To support an event.

### **Open Space Institute**

To provide general operating support.

### **Planned Parenthood Southeast**

To support a technology project.

### **Riverside University High School**

To match an employee donation.

### **Solaris Vocal Ensemble**

To support a recording.

### **Tamarack Waldorf School**

To match an employee donation.

### **The Montrose Center**

To match an employee donation.

### **United Way of Northwest Vermont**

To provide general operating support.

### **University of Vermont**

To support an arts event, and health programs.

### **Vermont Humanities Council**

To support Veteran's Book Clubs

### **Wind on the Wires**

To support an environmental project.

### **Women for MACC**

To match an employee donation.

## GRANT PAYMENTS OVER \$20,000

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**30th Street Industrial Corridor**

To provide general operating support.

**Access Esperanza Clinics**

To support health programs.

**Beyond Benign**

To support Green Chemistry education.

**Boston University College of Engineering**

To support a STEM program.

**Boys & Girls Clubs of America**

To support an initiative.

**Boys & Girls Clubs of Greater Milwaukee**

To support a campaign.

**Center for Biological Diversity**

To support an environmental project.

**Champlain Valley Office of Economic Opportunity**

To support heating and weatherization assistance, and the food pantry.

**CHOICES—Memphis Center for Reproductive Health**

To support a health program.

**Citizens Utility Board of Wisconsin**

To support an environmental project.

**Colorado Organization for Latina Opportunity and Reproductive Rights—COLOR**

To support a training program.

**Colorado Open Lands**

To support an environmental project.

**Colorado State University**

To support the Center for New Energy Economy.

**Communities for a Better Environment**

To support an environmental project.

**Conservation Law Foundation**

To support Lake Champlain conservation efforts.

**Cook Inletkeeper**

To support an environmental project.

**Cooperation Jackson**

To support an environmental project.

**DonorsChoose.org**

To support STEM programs.

**ECHO at the Leahy Center for Lake Champlain**

To support an environmental project.

**Environmental Learning for Kids**

To support environmental education.

**FIRST**

To support a robotics competition, and to provide a challenge grant.

**FIRST in Alabama**

To support STEM.

**FIRST Louisiana & Mississippi/Bayou Regional**

To support STEM.

**Fresh Energy**

To support an environmental project.

**Greater Houston Community Foundation**

To provide a disaster relief grant.

**Habitat for Humanity International**

To provide a disaster relief grant, and to support a housing project.

**If/When/How (Law Students for Reproductive Justice)**

To provide general operating support.

**Intercambio de Comunidades**

To provide general operating support.

**Kids on the Ball**

To support a tennis program for youth.

**Lambi Fund of Haiti**

To provide general operating support.

**Legal Voice**

To support health programs.

**Living Lands & Waters Restoration Organization**

To support an environmental project.

**Mercy Connections**

To support a justice initiative.

**Milwaukee Film**

To provide general operating support.

**Milwaukee Symphony Orchestra**

To provide general operating support.

**Minneapolis Foundation**

To support Re-AMP.

**Montshire Museum of Science**

To support youth programs.

**National Latina Institute for Reproductive Health**

To support health programs.

**Nurses for Sexual and Reproductive Health**

To provide general operating support.

**Penfield Children's Center**

To support an education project.

**Planned Parenthood of the Rocky Mountains**

To support reproductive health programs.

**Planned Parenthood Southeast**

To support an education program.

**Radio Milwaukee, Inc.**

To support a community project.

**RENEW Wisconsin**

To support an environmental project.

**River Revitalization Foundation**

To provide general operating support.

**Schools That Can Milwaukee**

To support general operating expenses.

**Shelburne Museum**

To provide support for general operations.

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## GRANT PAYMENTS OVER \$20,000

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**Spectrum Youth & Family Services**

To support a program for the homeless.

**Stand (FKA Forest Ethics)**

To support an environmental project.

**Steps Coalition**

To support an environmental project.

**The Conservative Energy Network**

To support a clean energy project.

**The Museum of Science—Boston**

To support an education project.

**United Performing Arts Fund**

To support Milwaukee arts organizations.

**United Way of Greater Milwaukee & Waukesha County**

To support teen pregnancy prevention.

**Urban Ecology Center**

To support environmental education.

**Vermont Foodbank**

To support general operating expenses.

**WGBH Educational Foundation**

To support an education project.

**WisconsinEye Public Affairs Network, Inc.**

To support a technology project.

**Wisconsin Policy Forum**

To provide general operating support.

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