



COMMUNITY  
FOUNDATION  
OF SOUTHERN WISCONSIN

# Inspired

ANNUAL REPORT 2015-16



Southwest Region



Green/Lafayette Counties



Rock/Sauk/Walworth Counties

# Mission and Vision Inspire Philanthropy



Dear Friends:

When you look at how often a community steps in to help people in need, chances are you'll think of many stories, locally and globally, that inspire hope and give rise to community spirit. For centuries, communities have come together in hard times and have celebrated collectively in good ones. Community spirit has kept many cities, towns, schools together and has certainly added to their vibrancy. That's why we are proud to have "community" not only in our name, but built into every aspect of our work.



## Mission

Matching personal philanthropy with community need. We will be there.

**For good. For ever.**

## Vision

The leader in **enriching** communities, **enhancing** lives, **enabling** giving.

ON THE COVER: A crew from the CAMDEN Playground Rebuild project cheers each other on. See page 12.



Look for these icons throughout the book for helpful informational tidbits.

Here at the Community Foundation of Southern Wisconsin, we are inspired every day by community spirit. Our donors, volunteers, staff, and Board of Directors prove through their passion that a deep sense of community creates involvement and improves the quality of life for all.

Through the generosity of our donors, the Community Foundation of Southern Wisconsin awarded 722 grants this year, totaling more than \$2 million. Projects supporting music and art, the environment, education, basic human needs, crisis response, and more, have made our communities more attractive, joyful, nurturing, and safe. We awarded \$876,348 in scholarships this year alone, highlighting an investment in youth and education. We're proud to share many of these stories with you in this report, and thank you for helping make these and so many other pay-it-forward stories worth sharing.

Next July, the Foundation will celebrate its 25th anniversary. It's a chance to reflect on the past 25 years of so many grassroots initiatives becoming exciting examples of community success, but it also inspires us to look ahead at new opportunities that, like our newly adopted vision statement states, make us the leader in enriching communities, enhancing lives, and enabling giving.

Our community spirit is strong throughout the regions we serve. To all of you who are a part of that, thank you for inspiring us every day to make our communities great places to live.

Executive Director

# A Million Great Things Donors Make Possible

# Thank you!



## 2015-16 AT A GLANCE

**614** TOTAL FUNDS

Donor-advised funds, community funds, excellence-in-education funds and more!

**722** # OF GRANTS

Health & human services, youth, community enhancement, arts & culture, education and more!



**6,757** # OF GIFTS

Donors recognizing the power of philanthropy and sharing our mission.

**538** # OF SCHOLARSHIPS

Students earning a financial boost to reach post-secondary education dreams.

**\$45,054,800**  
TOTAL ASSETS

Strong and healthy balance sheet that helps us achieve our mission for good, for ever.

**\$2,361,385**  
TOTAL GRANTS

Local nonprofit organizations continuing their great work with help from outcome-based grants.

**\$876,348**  
TOTAL SCHOLARSHIPS

Families breathing a little easier at the cost of post-secondary education for their child.





## Platteville Blends Harmony and History

### COMPOSER RESIDENCY PROJECT

Heidi Joosten, Composer and Wisconsin Native  
Photo courtesy of Mike Grittani Photography

Music has the power to influence us in many ways, especially culturally and emotionally, creating a powerful impact on world change. From words to rhythm, music's ability to connect us isn't always obvious. But it is in Platteville. Students eager to learn, plus a stone farmhouse and the legend within it, served as the inspiration for the Platteville High School Choral Program's Commission and Composer Residency Project.

The Platteville Community Fund and the Wisconsin Arts Board awarded grants to support Composer Heidi Joosten who wrote a piece for 6-12th-grade choir students. Based on the local mystery known as the Nodolf Incident (described at right.) Heidi beautifully blended history with harmony. The piece, *The Strange Night*, premiered in October, 2016 with 160 singers ages 11-18 assembled on the stage of the Platteville High School auditorium, and more than 600 in the audience with attendees from the school and the community.

"The students asked incredibly deep questions and really dug deep into the score to get the details right on dynamics, phrasing, and intent. It was a really beautiful process to see these budding musicians really get into a piece of new music," Heidi recalls. "I asked them to recreate the sounds of a rain storm using body percussion, wind sounds with their mouths, and to stutter for legend resemblance. They embraced these "extended" techniques like champs, a totally exciting thing to encounter," says Heidi.

The idea came from Amelia Armstrong, vocal music teacher at Platteville High School. **"We wanted to introduce students to a Wisconsin composer, involve them – and our entire community – in a fascinating piece of local history, and help them experience the compositional process firsthand," says Amelia. And that they did.**

# \$793,341

Platteville has a strong scholarship fund with us. This is the total number of dollars endowed in 24 named funds within the PHS Scholarship Endowment Fund. An additional \$45,349 in the general fund brings the number of scholarships given out locally each year into impressive life-changing ranges.



## 1881

A German farmer and his young wife discover their only children at the time outside at night in a powerful rain storm. When brought inside, the children's clothes are mysteriously dry, and the children now stutter but cannot explain what happened. They were the only two children out of the couple's eight who stuttered all their lives. The limestone house, while crumbling, is still visible and is an important part of local lore.



The financial stress in paying for college is felt by nearly every graduate seeking post-secondary education opportunities. But while scholarships can ease that burden, they also provide much more than just funds.

**Meet Casey Johannesen**, the very first recipient of the James E. Schroeder Memorial Endowed Scholarship – a four-year renewable scholarship awarded through the Iowa-Grant Educational Foundation). Casey is now in his senior year at UW-Madison where he is completing a degree in agronomy with a minor in environmental studies.

“Receiving this scholarship has meant a lot to me and my success as a student. Knowing that I have my community’s support makes me want to succeed that much more,” says Casey.

This scholarship endowment was established through the estate of Mr. Schroeder, well-known in the region as the ‘Father of the Madison Farmer’s Market on the Square.’ After a particularly bad wind storm that destroyed much of the orchard, Jim called the Iowa-Grant Schools to salvage as much of the fruit as was possible. Mitch Munson brought students from school and they worked hard to help with the clean-up. Jim was very impressed by their work ethic and behavior which reinforced his belief that if you know the land and have skills to work the land, you can survive. Jim cared about his local community and about the future of this local community. He also cared about kids and sought to help them develop survival skills for their futures. Jim, who died in 2011, didn’t forget what the students had done for him.

The Iowa-Grant Educational Foundation was established in 2000 to build an endowment that supports the Iowa-Grant School District.

In Grant County during the 2014-2015 school year, 59 youth in Platteville, Boscobel and Lancaster were identified as experiencing homelessness. That’s just three communities within the county, and just school-age children, meaning the number of children without homes countywide is much higher.

Family Promise of Grant County wants to see that number disappear and with the help of grants from the Lancaster Community Fund and the Platteville Community Fund they are on their way to reducing that number and helping children and families experiencing homelessness move forward with stability.

Family Promise coordinates host congregations throughout Grant County to provide overnight lodging, breakfast, lunch, dinner, and hospitality for homeless families during a given week. With the \$3,600 grant award from the Charles “Sonny” Tiedemann Charitable Fund, Lancaster Community Fund and the \$5,500 grant from the Elinore L. Loveland Trust, Platteville Community Fund, the organization was able to purchase a van for transporting families and children between host congregations and the Family Promise Day Center at St. Clement Parish, Lancaster. This new initiative is already making a difference in families’ lives, thanks to community support.

**“Having our van is crucial to our support of families in our program,” says Hannah Campbell Gustafson, Director. “We had one family that did not have a car of their own, but because we have the van (and two wonderful drivers) they were able to engage in the program and get back and forth between the host church and the Day Center.”**

Hannah also credits the van for helping clients who do have personal vehicles, but whose cars often aren’t as reliable as the van. “By using our van for daily transportation, clients that do have vehicles save money by buying less gas and reducing wear and tear on them. We are so so grateful for the grants!” Hannah shares.

## Helping Families Get on Their Feet

GRANT AWARD MEETS TRANSPORTATION NEED



# Hillsboro EIE Fund Changes the Face of Education



## 13

The number of EIE Funds currently managed by CFSW. Through solid partnerships with schools, CFSW can support students, strengthen education, actively engage families, and help build communities—today and into the future. For more on EIEs, visit [www.cfsw.org](http://www.cfsw.org)

A community school is an investment in the community itself. But what happens when traditional educational funding streams are fragmented and extra resources scarce—how can schools, and communities, stay current?

That's where the foresight of Hillsboro community donors to establish the Hillsboro Excellence in Education Fund comes into play.

The Hillsboro EIE helped fund projects such as *Standup Desks* to encourage the use of both bodies and brains that research points to as the perfect combination for the most effective learning and far better collaboration among peers than traditional desks; and *Leap into Legos* that teaches science and computer programming and beginning engineering principles; and the *SeaPerch Competition* that had students using physics to build a robot.

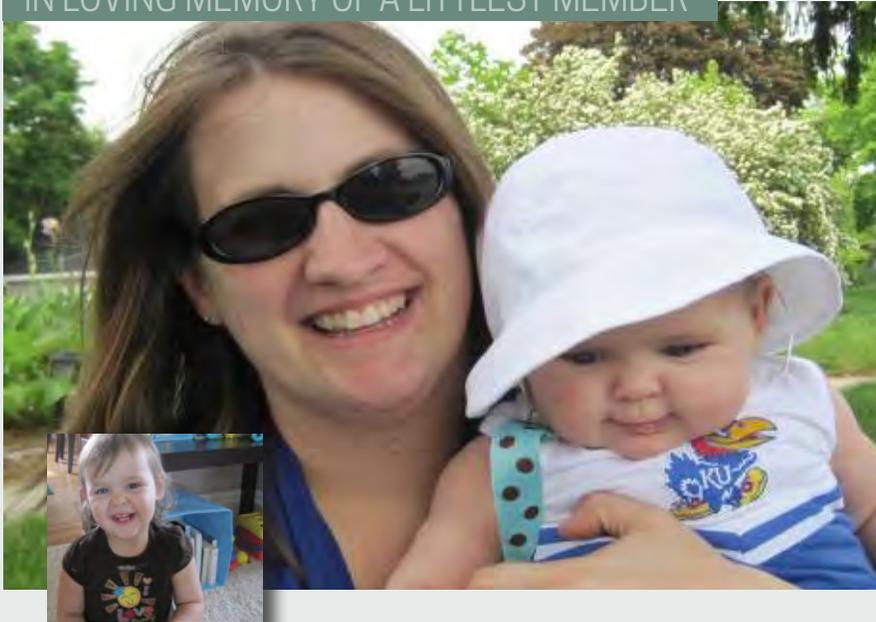
"It's important for so many reasons that we are a 21st Century learning environment," says Curt Bisarek, Hillsboro Superintendent. **"These grants provide our teachers the opportunity to pursue innovative approaches to learning for which they wouldn't otherwise have funding."**

The District is focused on implementing 21st Century skills needed by students for future success. Through research the district identified critical thinking, creativity, communication, and collaboration as key skills and have implemented curriculum to address development of those skills.

"These funds equip us to compete and ensure we are a robust, current, and innovative school that encourages students to explore not only their skills, but their passion," says Curt. "That's true academic *and* life-path achievements."

# Advisory Boards Shine in Communities

IN LOVING MEMORY OF A LITTEST MEMBER



Tracy Owen served as a dedicated active member of the New Glarus Community Foundation Advisory Board for two years, bringing wisdom and enthusiasm to the group. Even as a new mother, she still made time to serve, often strolling with her daughter to meetings. So when Catelyn passed away unexpectedly at 20 months old in September 2011, the board knew it had to do something to honor Tracy's commitment and hard work and Catelyn's loving and happy spirit they had all watched grow.

"The advisory board started putting aside money to build the amount up to a point where we could really make a difference. Since the New Glarus Public Library has its Capital Campaign with the Community Foundation it was a perfect match," explains Linda Gebhardt, Donor Services Representative.

This past August, members of the New Glarus Community Foundation presented the Library Board with a \$5000 grant to establish 'Catelyn's Corner,' an area for children to read with their families in the new library.

**"It was very moving and means so much to us to keep Catelyn's memory alive," says Tracy. "And what better way to show that than through families interacting beautifully with their children in a library. It's the kindest gesture. We were all in tears."**

With 18 community funds, the Community Foundation relies on the leadership and expertise of community members to learn of local needs, challenges, and opportunities. Each of our advisory board members has a strong sense of community and deep passion for improving the quality of life where they live – both of which help in raising funds and making smart decisions on grant distribution.

## 300

The number of local volunteers serving on our advisory boards throughout our service area who raise funds to build their endowment, and recommend distributions to qualified grant seekers. Thank you!

## NOTEWORTHY



Kaye Gilbertson has brought new energy to the Blanchardville/Hollandale Community Fund in her first year as

an advisory board member. She's been active with presentations, delivering grant awards, and offers space at her business for the group to meet. Since its start in 2007, the fund has re-invested more than \$60,000 in local projects.



In 2010, a group of committed volunteer advisory board members reached a fundraising goal of

\$50,000 in just 51 days to establish the Benton Community Fund. Jill Knight has served on the Benton Community Fund advisory board since its inception and currently serves as its chair.



# Cheese and Charity Help Children

## CAMPION FUND EVENT RAISES MONEY FOR YOUTH ART GALLERY

For the Monsignor Thomas F. Campion Charitable Fund, of Monroe, cheese and charitable intentions often go hand-in-hand. Their annual fundraiser, a cheese-tasting event, is proof Monroe gets behind its community with much support. This year, the event netted the Campion Fund nearly \$38,000 this year.

After Wisconsin cheese-making conventions showcased beautiful displays of delicious world-class cheese, organizers would often discard much of it at the end of the night. Fund advisory member and cheese-maker, Jeff Wideman, got the idea to make use of many of the award-winning selections that

were going to get tossed. Now, the cheese comes back to Monroe where local cheese companies spend days cubing it for the Campion event that hosts nearly 400 people.

This year, the fund supported the opening of the Monsignor Thomas J. Campion Youth Art Gallery at the Monroe Arts Center which celebrated its ribbon-cutting this September.

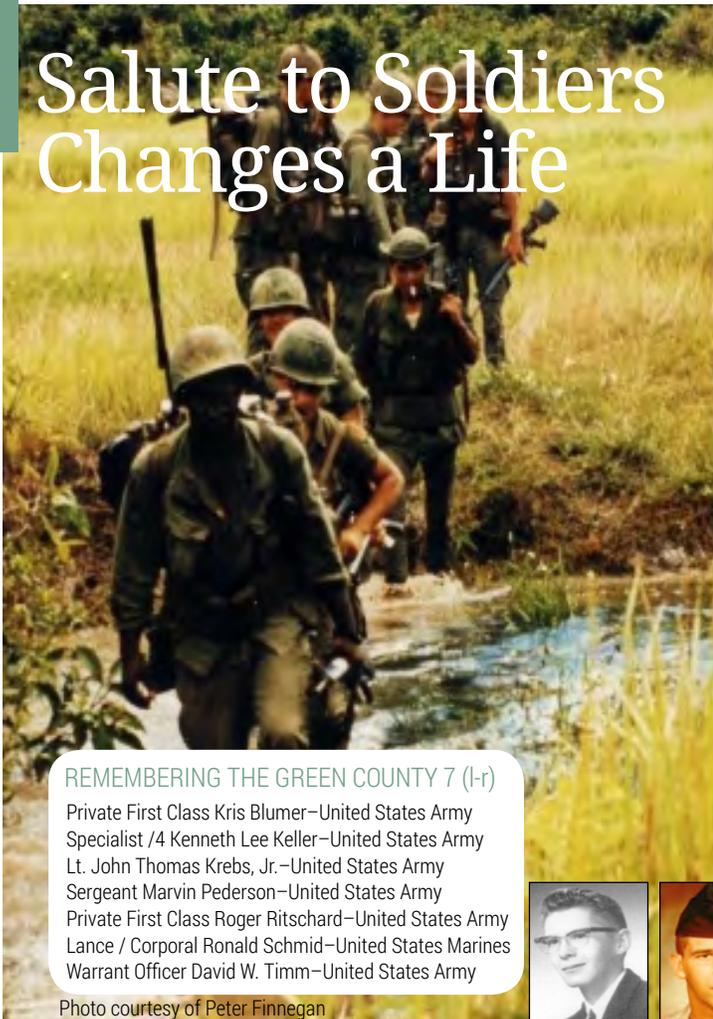
"I'm exceptionally proud of our community. It always comes through in support of projects that are a benefit to all who live here now and those who will live here in the future," says Ellen Marti, Campion Fund advisory board member.



A student proudly stands next to her artwork displayed in the new Youth Art Gallery.

Green/Lafayette Counties

# Salute to Soldiers Changes a Life



### REMEMBERING THE GREEN COUNTY 7 (l-r)

- Private First Class Kris Blumer—United States Army
- Specialist /4 Kenneth Lee Keller—United States Army
- Lt. John Thomas Krebs, Jr.—United States Army
- Sergeant Marvin Pederson—United States Army
- Private First Class Roger Ritschard—United States Army
- Lance / Corporal Ronald Schmid—United States Marines
- Warrant Officer David W. Timm—United States Army

Photo courtesy of Peter Finnegan



Tammy Derrikson, Director of the Behring Senior Center, first thought of a way to honor Vietnam War Veterans, including her own father who died in the war, after being so moved by a neighboring event. Knowing Green County had seven local men who lost their lives in the war, Tammy made a promise to their families that special recognition was imminently due.

The Clifford and Dorothy Reasa Charitable Fund of the Monroe Fund supported Tammy's 20-year vision with a grant to the Behring Senior Center's program, **A Salute to Vietnam Era Veterans**. It featured local presentations, a tribute to the seven soldiers, and a powerful exhibit by Vietnam Veteran Army photographer, Peter Finnegan. Nearly 700 people participated. But what was and continues to be inspirational to Tammy are the positive spiraling outcomes that came as a result: a new network of organizations also involved in honoring our veterans; a bonded group of veterans who now meet regularly; lasting community relationships that are committed to an ongoing programs; and thoughtful, courageous conversations about the war.

But perhaps the most meaningful response came from a Veteran himself who told Tammy, "I attended your event and I have to say that it changed my life. Up until then, I couldn't even talk about it."



Maxine Reasa, a resident of Pleasant View Nursing Home, plays cards regularly but makes sure the group ends their game in time for her to still enjoy the gardens during daytime. She is proud her family shares a tradition of giving back and pointed out several plaques in the garden honoring its generosity.



A sign as you enter the gardens from the back honors the grants from the Monroe Fund and its family of funds that made the project possible. It is one of many plaques thanking the community and the families for their gifts that made it blossom.



Sandra Hubert, staff member at Pleasant View Nursing Home, shares stories about the garden with residents. Prior to the garden completion, residents often went outside in the front of the facility with a view of the parking lot. As one resident joked, "these beautiful flowers are much better to look at than cars." The garden also hosts dances, family dinners, meetings, and other fun events.

# Purpose Blossoms in Garden

GRANT MEANS MORE THAN JUST BEAUTY TO RESIDENTS



Rosalie Leopold wakes every morning with the same request: please raise the blinds in her room so she can take in the beauty of the new gardens at Pleasant View Nursing Home in Monroe.

What used to be an unused yard is now filled with colorful blooms, paved walking trails, raised flower beds to accommodate reach, benches for rest, family gathering areas, even tomato plants for use in cooking. A grant from The Clifford and Dorothy Reasa Charitable Fund of the Monroe Fund helped make the extreme yard makeover possible.

Rosalie and fellow resident, Maxine Reasa (pictured above left), the two former "farmers' wives" as they proudly state, get outside to tend to the flowers and take in the fresh air as often as they can. Only now, the benefits are far less work-based, and far more leisure- and love-minded.

**"We really enjoy it out here now," says Rosalie. "We can relax, breathe, enjoy." Maxine adds, "It's not work to us. We love tending to the flowers. It's so nice because it gives us purpose again."**

Administrator, Terry Snow, says she is grateful for the grant because it made the garden project happen much faster – in one season – versus years it would have taken to build into the nursing home's annual budget that has to serve more than 100 residents.

"Monroe is an amazing community of generous people. There were so many that made this project possible," says Terry. "And what it's done for residents, is immeasurable. Thank you, Monroe Fund!"



# Lakes and Love Stre

ROCK AND WALWORTH COUNTY MEN GET CREATIVE WITH



## \$85,000

Established in 2001, the Edgerton Community Fund is a permanent financial resource for the Edgerton community and a means for Edgerton residents to match their philanthropy to community needs. Each year a portion of the Fund's earnings are given back to the community in the form of grants. Since its founding, the Fund has re-invested more than \$50,000 back into the Edgerton community.

Ask anyone who fishes regularly and undoubtedly you'll hear them say, there's a lot more to fishing than just catching fish. Never has that been more true than with Buck Jenkins, formerly of Edgerton, and the late, Jim "Plugger" Plautz of Edgerton.

It was tradition for Buck and Plugger to gather all their buddies at the end of ice-fishing season, unfreeze their catch to filet, batter, and fry it all up at Jim's Red Baron Restaurant. They loved the sport and the camaraderie so much they shared it, and their signature deviled eggs as accompaniment, with the community -- for free.

When the Edgerton Community Fund was looking for a fundraising event, advisory board chair, Wendy Oren, stepped up to ask Buck if the fund could continue the fish fry in Buck's name as a way to benefit the community in meaningful ways: through a fund that would invest proceeds to meet the needs of Edgerton and build an endowment to generate long-lasting support. He didn't hesitate to say yes.

20 years strong, the Buck Jenkins Fish Fry is held in the spring and this past year its advisory board set a goal to raise \$10,000 to establish the Buck Jenkins Fund within the Edgerton Fund. Hundreds of guests and numerous generous sponsors helped the group reach its goal. The Edgerton Fund also manages the Jim "Plugger" Plautz Endowment Fund.

**"A strong community doesn't exist from the power of just one person. It takes a whole community to make it great. Edgerton is filled with generous people," says Wendy. "And Buck is just a good, kind-hearted soul with a lot of pride for Edgerton."**

Now approaching 80 and living in northern Wisconsin where the fishing is also great, Buck Jenkins and his famous fish fry live on, along with a legacy in his name -- all because of the one that didn't get away.

# Strengthen Community

RAISING FUNDS FOR LOCAL LIFE-ENHANCING PROJECTS

At 70 years old, John Henderson felt there wasn't much he needed in his life that he didn't already have. In his words, "at this stage I'm trying to simplify." So when he decided that he was going to celebrate this milestone birthday in a big way he did so by "inviting the world" to a party on Lauderdale Lake and requesting no personal gifts. What he did do, however, was offer to match any monetary gifts given instead to the Elkhorn Fund.

**"We had a great time. More than 150 friends and family joined us and donated \$3,500 which my wife and I matched for a total of \$7,000 for the fund," says John.**

Those gifts came in a variety of sizes and creative ways: one of his friends made a donation of \$365 -- a dollar a day for the year of his birthday; his brother gifted \$1000 for what John jokingly thinks was a way for him to have to pay up.

John served on the Community Foundation of Southern Wisconsin Board for 6 years and in that time helped established the Elkhorn Community Fund to make critical investments in local projects. He was raised with a philosophy of philanthropy and paying it forward, saying it has all come back to him in the blessings he's received in return.

Currently the Elkhorn Fund has \$228,356 and has supported and leveraged other gifts to help the local food pantry, Habitat for Humanity, local schools, and more.

"I want to see the fund grow even more. I want to see it get to \$1 million in my lifetime."

Something tells us that as John and his wife, Jean, continue on their path of community generosity, friendships, and birthdays, he very likely could.

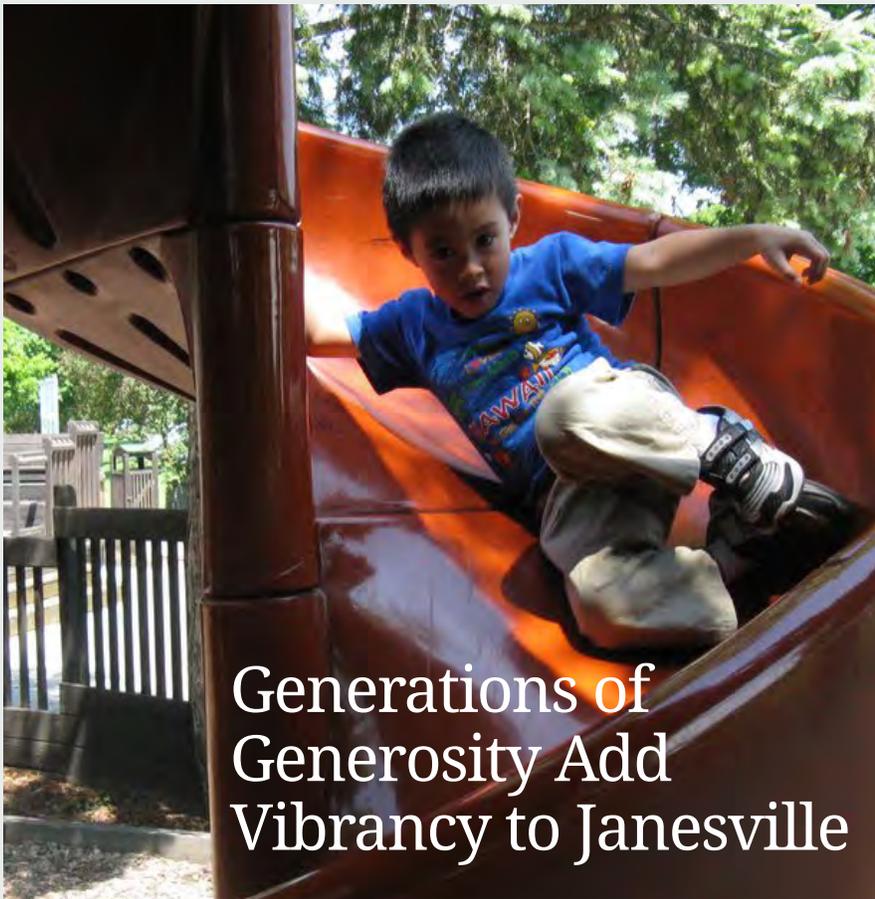


## A Birthday to Remember

"The Community Foundation is the perfect vehicle for giving back wisely.

They validate every donation, ensuring that gifts are going to credited organizations. As a donor, that's important to me. They also help keep communities vibrant, strengthening schools, the arts, neighborhoods and more."

– John Henderson, 2016



## Generations of Generosity Add Vibrancy to Janesville

While Camden Hookstead's brothers and cousins played at a park back in 1989, he watched from the sidelines unable to join in because of disabilities. For his aunt, Sherry Kuelz, that was the catalyst to change the playground arena. In May 1993, after much research, fundraising, and ordinance clearances, the largest and most accessible playground was completed in Janesville because of Sherry's perseverance and love for Camden. Twenty three years later, rotting wood and worn surfaces incited plans to rebuild this playground with maintenance-free, long-lasting materials. The effort swung to new heights thanks to a grant from the Janesville Generations Fund.

The project was estimated to cost \$360,000 to \$400,000. The Janesville Generations Fund partnered with Janesville Foundation to offer two \$50,000 matching grants then successfully raised the match for a total of \$150,000 in grants to the project. The CAMDEN Foundation raised the remainder with generous community support.

**"If not for the Generations Fund, we may not have met our goal," says Sherry. "Because of this grant, we have been able to purchase new equipment and most important, make this playground even more accessible." Now many more children and adults with special needs, and elderly will be able to have a place to come and enjoy life away from some of their challenges. "From my heart, I thank everyone who made this possible. It is a dream come true... again," Sherry expresses.**

[In the photo: Gabriel E. Bangasan, visiting from Hawaii, enjoys a trip down the swirl slide at CAMDEN Playground.]

# 6,000

The number of individuals with special needs in Rock County alone.

# 240

Similar playgrounds have been modeled after CAMDEN Playground world-wide, including in Holland, India, Canada, and all across the US.

TRANSFORMING LIVES

FOR GOOD. FOR EVER.

# Did you know...

COMMUNITY FOUNDATION OF SOUTHERN WISCONSIN MANAGES

**18**  
COMMUNITY FUNDS

**51**  
FIELD OF INTEREST/  
EXCELLENCE IN EDUCATION  
FUNDS



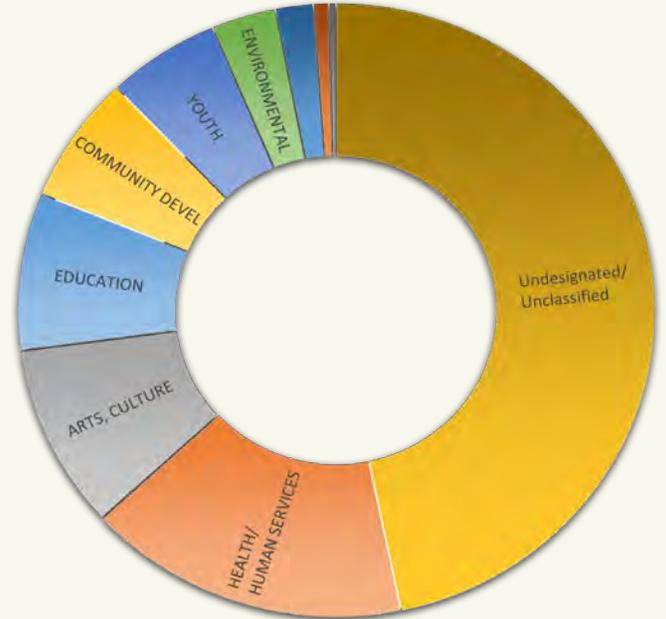
Serves 9 counties

ASSISTS **57** DONOR-ADVISED FUNDS

OVERSEES and DIRECTS

**87**  
DESIGNATED FUNDS

*For a description of funds and ways to create or give to them, turn to page 18.*



\$531,150.08	HEALTH/ HUMAN SERVICES
\$316,328.02	ARTS, CULTURE
\$268,317.80	EDUCATION (excluding scholarships)
\$217,353.75	COMMUNITY DEVELOPMENT
\$186,148.03	YOUTH
\$106,106.04	ENVIRONMENTAL
\$62,295.07	RELIGION
\$25,126.00	SPORTS/LEISURE
\$12,123.23	OTHER (animal, international, philanthropy)
\$1,512,784.84	UNDESIGNATED/UNCLASSIFIED

TOP GRANT CATEGORIES IN 2015-2016

TOTAL GRANTS \$3,237,732.86

MANAGES  
**235**  
SCHOLARSHIPS

**JULY 2017**  
MARKS CFSW'S 25TH  
ANNIVERSARY  
<EST. 1992>

# Caring for a Cause

THREE INSPIRING INDIVIDUALS MAKING A LONG-LASTING DIFFERENCE



**Esther Elmer**  
Monroe

Esther Elmer knew the value of hard work and a good education early on. She attended a rural school, graduated from Monroe High and Green County Normal School, and went on to earn her Master's degree in Education from UW-Platteville in 1964. She taught in Green County Rural Schools and moved on to Abraham Lincoln Elementary where she retired in 1985. Esther passed away in December 2015, but not without a plan to continue her support of education.

Esther and her husband, Robert, also farmed, and although they didn't have children of their own, she claimed many.

"She used to say she had hundreds of children," remembers Gladys Schild.

**Education, children, and community were highly important to her and the reason why, Gladys says, she left a bequest to the Excellence in Education Fund for Monroe Schools.**

"She was a great sister, a great teacher" Gladys reminisces. "But she was also a great person. She wanted to make a difference." And she still does.



**Louise Brockman**  
Platteville

Louise Brockman admits she knew little about the Platteville Community Fund before joining its Advisory Board. What she did know a lot about, however, was the power philanthropy has on the people and projects in her community. Now after two full terms on the board, Louise eagerly shares the importance of the fund and the impact it has had locally.

**"Whether you pay it back or pay it forward, the end result is the same: the good that it does – it's beautiful," says Louise.**

Louise credits community foundations for being the perfect conduits for easy ways to give. "They certainly can make dollars go much further collectively than a single donation can," Louise explains. "I firmly believe that we have all been beneficiaries of good things in our lives and should lend a hand or help in return."

Louise says she is proud of the board and the choices it has made on projects that enhance life in Platteville. It goes without saying, we are equally proud and grateful for all that Louise does for us, too.



**Darlene and Don Adee**  
Janesville

Don Adee died in 2001 at age 61 from Alzheimer's Disease, but his legacy lives on through his wife, four sons, and a fund they established in his name.

The Don Adee Alzheimer's Disease Fund, a donor-advised fund, provides support services and programs for Rock County people suffering from dementia-related disease and their families. While originally set up to support an organization that helped the Adees manage challenges, the fund never lost its purpose despite the agency ending services in Rock County. The Community Foundation helped redirect the fund's support to another local service provider that meets the family's wishes: outreach, education, and care for local patients and families coping with the disease.

"My dad was the first Alzheimer's patient to testify in front of the Wisconsin Congress to lobby for research and resources, says son, Jeff.

**"He was always about service despite the disease, giving back, making a difference for others. This fund would be a big deal to him. We're honored to have the Community Foundation manage it for us."**

9

Years of sharing wisdom, talent, and resources on our advisory boards and board of directors.

**Many thanks,  
Dick Jaeger!**



## Recognizing Service that Inspires

**D**ick and Marilyn Jaeger are so accustomed to giving back that even as they prepared to move from Blanchardville to Arizona they did so in charitable style.

With years of faithful support to the Blanchardville/Hollandale Area Fund and the Pecatonica Excellence in Education (EIE) Fund, the Jaegers decided to have a little fun – and a lot of philanthropy – with downsizing before their trip.

### THANK YOU FOR YOUR DEDICATION

“I enjoyed the years of serving on the CFSW Board of Directors. The families that entrust their philanthropic investment with CFSW deserve only the best. I have been very impressed with the quality and diverse talents of the board members and their dedication.

It was a pleasure to serve with the board and the dedicated staff of CFSW.” – Dick Jaeger, 2016

Before moving, the Jaegers decided to finish a goal they had started. While the The B/HAF was progressing, the Pecatonica EIE seemed at a standstill. Marilyn suggested the couple sell all the home furnishings their children and grandchildren did not want or need and give the proceeds to the EIE fund.

“We decided to match the proceeds personally to be sure we got the fund over the necessary \$10,000 startup,” explains Dick. “Many friends showed up and bought for themselves and their children because they knew our commitment to the fund. It was a fun and a relatively easy way to pay it forward.”

Dick has always recognized that there are many projects that would improve the quality of life in a community but ones that an individual would seldom be able to finance alone.

Together, he and Marilyn have had great impact on garnering additional support that shows that a community fund and an EIE fund bring a community together for the benefit of life within it. As Dick humbly puts it, “All we need to do is combine the resources of many and watch it happen.”



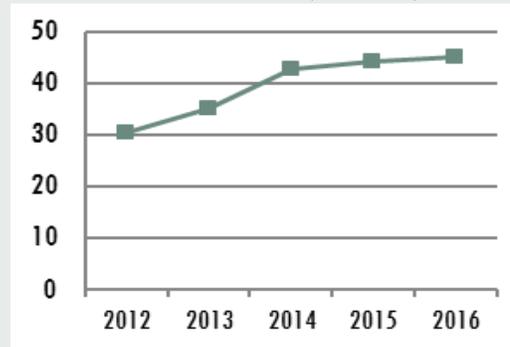
## Condensed Statement of Activity

	2016	2015
<b>REVENUES AND GAINS</b>		
Contributions	5,444,845	2,895,208
Investment and other revenue	456,539	1,696,143
<b>Total revenues and gains</b>	<b>\$5,901,384</b>	<b>\$4,591,351</b>
<b>GRANTS AND EXPENSES</b>		
Grants and program expenses	4,640,391	3,161,277
Management and general	364,144	327,966
Fundraising	96,982	91,914
<b>Total grants and expenses</b>	<b>\$5,101,517</b>	<b>\$3,581,157</b>
<b>Increase in net assets</b>	<b>799,867</b>	<b>1,010,194</b>
<b>Net assets, beginning of year</b>	<b>39,537,502</b>	<b>38,527,308</b>
<b>Net assets, end of year</b>	<b>\$40,337,369</b>	<b>\$39,537,502</b>

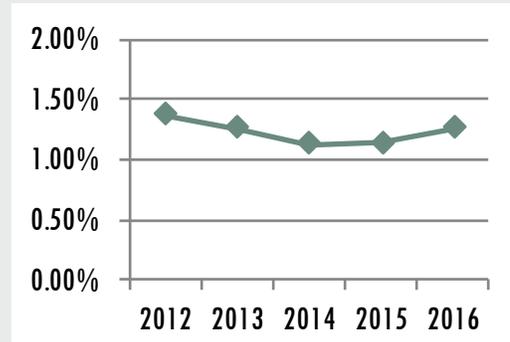
# Financials & Stewardship

Donations to the Community Foundation of Southern Wisconsin are pooled for investment purposes with total returns allocated to each component fund. The Asset Management Committee of the Community Foundation monitors the performance of our investments in conjunction with a team of investment managers from area financial institutions. Our investment managers are from BMO Harris, First National Bank & Trust-Beloit, Johnson Bank, Union Bank & Trust, US Bank, and Wisconsin Bank & Trust.

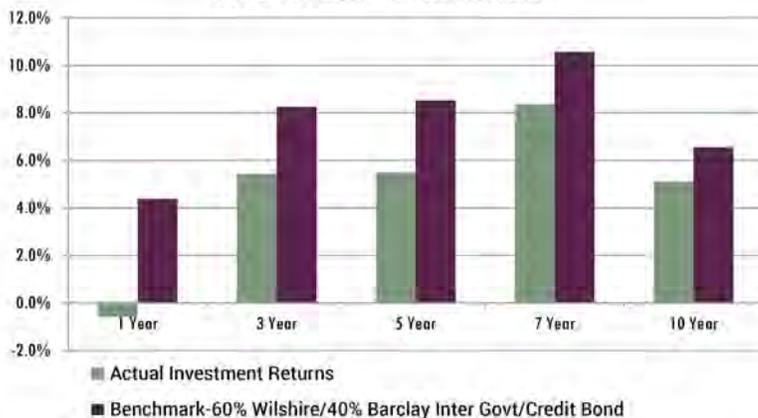
**Growth of Assets** (In Millions)



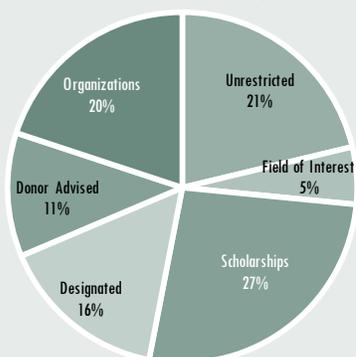
**Operational Expenses** (as a percentage of assets)



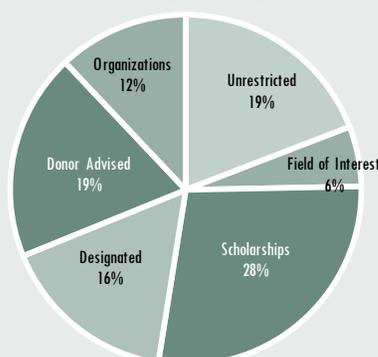
**Investment Performance**



**Assets by Fund Type**



**Grants by Fund Type**



Field of Interest	Donors support causes rather than specific organizations
Scholarships	Most scholarship awards are presented to high school graduates
Designated	Donors choose specific nonprofit organizations to receive on-going support
Donor Advised	Donors recommend grants to charitable organizations
Organizations	Founded to support specific organizations with annual grant awards
Unrestricted	Advisory boards recommend grants to address current needs. Includes community funds

# How a Community Foundation Helps Drive the Economy

A DRAW FOR LOCAL BUSINESS & GROWTH

While community foundations have not traditionally engaged in direct economic development services and programs, they have always supported economic development initiatives, and contribute to community enrichment in a variety of ways that are good for both the people who live here and businesses looking for positive social impact.

A community foundation is more than a guardian of charitable funds established by donors. A community foundation helps each donor match his or her charitable interests with community needs, and then manages them by investing the donor's gift in a diversified portfolio, soliciting applications from nonprofits that fit the donor's interests, overseeing the grantmaking process, and monitoring grantees' progress toward outcomes. This process – from gifts to grants to goals – is important because it tells the story of a community's willingness and ability to advance the health and well-being of local residents, respond to immediate needs, and plan for the opportunities and challenges that might arise in the future – things that promote a region's vitality in order to retain and attract commerce.

The Community Foundation of Southern Wisconsin awarded \$217,353 in grants to community development just this year alone for things such as park improvements, historic preservation, and environmental projects. We invested \$316,328.02 in arts and culture; nearly \$1 million in the education of our youth that further helps develop workforce skills; and \$532,150 toward health and human service needs. That represents significantly more than just gifts to the organizations carrying out the initiatives. That investment into communities also means employment, commitment to social priorities, and benefits that enhance life and build prosperity for all.

The Community Foundation of Southern Wisconsin knows the promising developments already underway throughout our region, and we are committed to helping our communities build upon family, community, and regional success to offer the best places to live for generations.



Sustainability of a community's social service programs and educational opportunities is critically important for our future.

The Community Foundation of Southern Wisconsin plays a vital role in long-lasting support of community needs.

– John Beckord  
President, Forward Janesville Inc.



# Make your gift timeless

## TYPES OF FUNDS

**Community Funds** Allows individuals and groups to contribute time and money toward the betterment of a specific geographic area. A local advisory board recommends grants to projects and programs based on the changing needs of that community.

**Donor Advised Funds** By establishing a Donor Advised Fund, donors retain the right during their lifetime, or during the lifetime(s) of other advisors(s) named, to recommend grants to specific agencies and institutions or to specific program fields.

**Designated Funds** Allows donors to support the good work of one or more specific nonprofit organizations. Because a gift is given through the Community Foundation, it provides the organization selected with a perpetual stream of annual income for operations and programs.

**Field of Interest Funds** Allows donors to target gifts that address needs in an important area of community life such as at-risk youth, the elderly, or the arts, while allowing the Community Foundation to make grants to support programs and projects within specified field(s).

**Organization Endowments** Nonprofit organizations may establish endowments with the Community Foundation to support their future operations.

**Scholarship Funds** Donors decide the name of the fund and specify selection criteria for recipients such as academic achievement, specific field of study, or financial need.

## WAYS TO GIVE

**Outright Gift:** Cash, stocks, bonds, real estate and property, or other assets.

**Life Insurance:** Name the Community Foundation as the beneficiary and owner of life insurance policies.

**Qualified Retirement Plans and IRAs:** Use assets accumulated in qualified retirement plans or IRA accounts to fulfill charitable goals, thereby keeping assets free from tax liability.

**Charitable Remainder Trust:** Place cash or property in a trust that pays annual income to you or a named beneficiary for life. After your death the remainder of the trust sum is transferred to the Community Foundation and placed in your charitable fund.

For comprehensive details and even more options, **visit [www.cfsw.org](http://www.cfsw.org)** or contact your regional Donor Services Rep at right. We also recommend connecting with your personal financial advisor or attorney for a closer look at the tax-savings benefits.

## WHO CAN HELP



**Jane Maldonis**  
Donor Services Rep  
**Contact: [jane@cfsw.org](mailto:jane@cfsw.org)**  
**(608) 758-0883**

Rock-Sauk-Walworth



**Barb Daus**  
Donor Services Rep  
**Contact: [barb@cfsw.org](mailto:barb@cfsw.org)**  
**(608) 778-3344**

Southwest Region



**Linda Gebhardt**  
Donor Services Rep  
**Contact: [linda@cfsw.org](mailto:linda@cfsw.org)**  
**(608) 328-4060**

Green-Lafayette Counties

## Spending policy

The spending policy allows the Community Foundation to pay out the most it can through its grantmaking while ensuring long-term growth of all permanently endowed funds. Generally, grants are not made from funds during the first three years to best assure no deterioration of the original gift. Then annually, after reviewing market trends and current climate, the Board, at its July meeting, approves a spending policy for grant-making in the coming fiscal year. The spending policy of each endowment will be a percentage between 4% - 6%, of its average market value over the 12 trailing quarters.

# Board of

# Directors



Ron Spielman  
Chair  
Green County  
Special Project Advisor  
Monroe Clinic



Steve Sheiffer  
Immediate Past Chair  
Rock County  
Retired  
City Manager, Janesville



Dick Jaeger  
Secretary  
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Retired



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Attorney  
Nowlan & Mouat



Larry Barton  
Rock County  
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Court Commissioner



Bobbie Bernet  
Green County  
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Laura Carney  
Rock County  
Nurse Practitioner  
Whitewater Family  
Practice



Carol Hatch  
Rock County  
Attorney  
Nowlan & Mouat



Cheryl Mader  
Crawford County  
Project Leader  
Community  
Development Alternatives



Cindy Tang  
Grant County  
Consultant



Lois Smith  
Rock County  
Professor, Marketing  
Retired  
UW-Whitewater



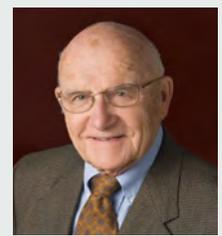
Ken Klaas  
Grant County  
Field Service Manager  
TDS Telecom



Bill McDaniel  
Lafayette County  
Attorney  
Johnson, Karanz &  
McDaniel



Julie Wilke  
Green County  
Retired  
Vice President  
Monroe Clinic



Alan Dunwiddie  
Director Emeritus  
Rock County  
**FOUNDER**

## Founders and Formers

### Founders

George Brunner  
Robert Collins†  
John Condon†  
James Cripe\*  
Barbara Daus  
David Deininger  
Alfred Diotte\*†  
Jane Dunk  
DeEtte Beifuss Eager  
Gregory Galvan  
Patricia Graham

Richard Gruber  
Melita Grunow  
Patricia Guttenberg  
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Rhonda L. Hartwig  
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Tina Lorenz  
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Steve Olsen  
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Janice Schmidt

Frank Scott  
Elizabeth Siegert  
Gary L. Smith\*  
James Stauff†  
George K. Steil, Sr.†  
John Steil\*  
Lisa Stevens  
Donald Templin  
Cere Turner

† Deceased  
\* Founding board members

Special thanks to Wegner CPAs for  
sponsoring this report.



## Connect with us!

### IN THE OFFICE

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Jane Maldonis, Rock/Sauk/Walworth Donor Services Representative • [jane@cfsw.org](mailto:jane@cfsw.org)

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Jackie Omodt, Grant and Scholarship Manager • [jackie@cfsw.org](mailto:jackie@cfsw.org)

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**Wisconsin Bank & Trust, 2nd floor,**

**1717 10th St., P.O. Box 733, Monroe, WI 53566**

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Kristine O'Connor, Administrative Assistant • [kristine@cfsw.org](mailto:kristine@cfsw.org)

**In Platteville | (608) 778-3344**

**Wisconsin Bank & Trust, 2nd floor,**

**10 Keystone Pkwy., P.O. Box 81, Platteville, WI 53818**

Barb Daus, Southwest Wisconsin Donor Services Representative • [barb@cfsw.org](mailto:barb@cfsw.org)

Andy Custer, Administrative Assistant • [andy@cfsw.org](mailto:andy@cfsw.org)

### IN CYBER SPACE

**[www.cfsw.org](http://www.cfsw.org)**

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The New Glarus Excellence in Education Fund grant to the New Glarus School's Therapy Dog Program allowed some furry friend-making at the New Glarus Home. The dogs, trained by students, participate in community service activities at the New Glarus Home through weekly visits.