



GIVING BACK. LOOKING AHEAD.

Our 2016-2017 Annual Report to Our Community



COMMUNITY
FOUNDATION
OF SOUTHERN WISCONSIN

Leading the Way with Passion and Purpose



Ann Heiden



▲ Jackson Street merchants with their wares, circa 1890. This batch of retail stores later became the Cain Ashcraft Building, 11 South Jackson Street, just down the street from the current Community Foundation of Southern Wisconsin Janesville office. [Credit: Gruver photos, vol. 1, p. 30 Hedberg Public Library.]

Giving Back. Looking Ahead. Thank you for being a part of our successful year and our promising future. In spring 2017, the Community Foundation of Southern Wisconsin reached \$50 million in assets. The significance in that is much more than dollars we hold, however. The significance is in the impact our assets have on people, places, and projects. Reaching that milestone means our donors trust in us to make the most of their charitable gifts, our communities and schools can make more essential projects happen because of an increase in grants, and more students can pursue post-secondary education because of additional scholarship support.

Our mission, *Matching Personal Philanthropy with Community Need. For Good. For Ever.*, is what fuels our passion and purpose for growth.

In my three years here, I have witnessed unparalleled dedication to community wellbeing: people stepping up to give back to causes important to them within the framework of making their communities better places to live for generations to come. You'll read about many of these stories in the pages ahead.

The Community Foundation of Southern Wisconsin is strong and focused on the future so that we can continue to ensure we meet each donor's charitable intentions and desire for creating lasting support. Thank you for seeing the value in giving back and recognizing the wisdom in looking ahead. More important, thank you for sharing our passion and purpose for doing good for ever.

Ann E. Heiden Executive Director



Ken Klaas

My first exposure to the Community Foundation of Southern Wisconsin was serving on the advisory board of the Lancaster Community Fund. It didn't take long for me to see the impact dedicated people from a small town like Lancaster could have on the entire community. As Board Chair, it is my honor to serve an organization with tremendous capacity to positively change many communities throughout nine counties.

All of us on the board and staff feel privileged to share our stories in this annual report — stories that will show you that our true inspiration for our work comes from you, our donors, our grant recipients, our students and teachers, and our community residents simply wanting to influence great things in our world.

On behalf of everyone featured within these pages, thank you for making a difference.

Ken Klaas Board Chair



▲ Current 26 South Jackson Street and home to the Community Foundation of Southern Wisconsin, Janesville office. We also have offices in Monroe and Platteville (see back cover.)

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.

2016-2017

AT A GLANCE

A snapshot of our annual impact.

By the Numbers

Total Funds



629

614
last year

Number of Gifts



7541

6757

Awarded Grants



765

720

Awarded Scholarships



542

538

By the Figures

Total Assets



\$50,257,055

\$45,054,800
last year

Total Grants



\$2,885,629

\$2,119,965

*includes grants from agency funds/not reflected in audit.

Total Scholarships



\$855,383

\$893,348

= Total Grants \$3,741,012



Iowa-Grant School District Gets Treated to Big-City Lessons

Nearly one-third of US children attend a school in communities of fewer than 25,000 people. These rural schools often have limited resources and challenging access to many of the activities and programs enjoyed by larger urban schools. The Iowa-Grant School District encompasses about 195 square miles in an area consisting primarily of agricultural lands and undeveloped woodlands. Serving 746 children in early childhood through twelfth grade, the district often has to get creative when looking to add extras to its teachings. For example, a field trip takes much more time because of the travel it takes; teachers look to piggy back other activities to maximize efficiency.

And such was the case with a grant from the Iowa-Grant Educational Foundation (IGEF) that brought in visiting author and illustrator, Rick Chrustowski. When

Title I Reading Specialist, Carolyn Laufenberg, learned Rick would be in the area for another program she jumped at the chance to bring him to the district.

"Getting this grant meant we could expand on what we have and offer something fun and educational that met goals of reading, writing, art, and science," says Carolyn. "This was absolutely amazing -- it not only excited children into learning, but greatly inspired teachers and parents, too."

In addition to demonstrating his talent of "quick draw," Rick also shared his gift of story-telling based on personal research to ensure facts and accuracy. Things like frogs, blue birds and other natural things took the shape of words and drawings.

In another example, last year, the Iowa-Grant Educational Foundation helped the

district bring in the Missoula Children's Theatre Group to expose kids to performance and keep them engaged in school even during the summer. Children ages 6-18, most of whom have never even had the chance to see a musical performance before, got the chance to act, sing, and dance in a full-length musical.

"The first grant started the momentum. When the community saw what the kids could do, support came in," says Tricia Sander, teacher and grant applicant. "That 'seed' money helped leverage additional support and now our ticket sales help fund the program as a continuing summer project for the students, the teachers, and our community," Tricia says.

The performances included more than 60 students and sold out every show in both summers. Tricia says that was not only great for the kids, but also the community

at large as they were able to see a theater performance at low cost that they would otherwise need to travel to see.

In addition, the Missoula group conducted an in-service for teachers on how to bring theater into the classroom setting, a lesson Tricia said was beneficial for getting kids more comfortable reading out loud and more confident in themselves.

"We wouldn't have been able to start this without the grant," Tricia explains. "It's grown in areas I never dreamed it would."

While the Iowa-Grant School District may be considered rural, its exposure and access to the same learning opportunities as more urban districts doesn't always have to be limited. With a little help from the Foundation, they are already shining under big-city lights.



The Impact of a Can-Do Community

While its population of just 2,487 residents is considered relatively small, Mineral Point, Wisconsin is proving its people care for their community in a big way.

The thought of establishing long-lasting support began in an economic development meeting in 2015 when the question was raised: *"How can Mineral Point establish an endowment fund that would add to the vitality and sustainability of all the good that exists within our community?"* After some homework, several people in the group committed themselves to learning even more and ultimately selected the Community Foundation of Southern Wisconsin to help manage their funds that would support their community and local education. In 2016, The Mineral Point Community Foundation (MPCF) and the Mineral Point Excellence in Education Fund (MPEIE) were created as component funds of CFSW, and in just three short months, the advisory boards raised endowments of \$100,000 and \$10,000 respectively for their community and school.

"There isn't anything you can't get done in Mineral Point," says Kristin Mitchell, chair of both MPCF and MPEIE advisory boards. "This is a community where everyone wants to do their part to enhance and sustain the quality of life. Everyone who lives here values Mineral Point. We all want to make it a better place for our children and their children."

Initially, the group raised funds by looking inward: board members each committed to gifts to get the fund growing. Now plans are underway to spread the word throughout the community in order to raise even more funds and award grants as early as next year.

"We have a list of exciting initiatives that will add significant value to Mineral Point," Kristin says. "We are just getting started!"





platteville community fund

Platteville's Philanthropy Drives Project Development

When it comes to philanthropic purpose, Platteville, WI seems to live it best. Through strong collaboration among area leaders, citizens, and businesses, groups are consistently able to raise critical funds, complete projects and offer educational support to enhance the quality of life for all who live there.

The Platteville Community Arboretum and its David Canny Rountree Branch Trail, the local library, the new outdoor fitness center, and local scholarships, all mark the effort of a community willing to reach into its pockets or roll up its sleeves. Local non-profits with endowments with the Community Foundation (PHS Scholarship Fund, Platteville Community Arboretum, Platteville Public Library Foundation and the Platteville Community Fund) are working to meet the needs of the community and school.

"We demonstrated early on that everyone has the opportunity to give something easily, whether that was money, time, or sharing of talent," says Gene Weber, who serves on the boards of both Platteville Community Arboretum (PCA) and the PHS Fund. "When you mobilize the right people and organize leadership collaborations, things get accomplished."

For example, while 500 contributions supported the new paved and lighted trail project under the leadership of the PCA, there were nearly 1500 volunteers who helped in some way to complete it, further demonstrating that everyone brings value to the efforts because both money and manual labor are always needed.

"Through organizational collaborations, we have completed many projects," says Gene. "With a quick look around you'll see smiling people walking, jogging and biking on our trail; children using state-of-art technology at the new library; people, young and old, using the outdoor fitness center to grow stronger and healthier; and our graduates furthering their education with support from their community."

All of these, says Gene, contribute to the health and vitality of our community today and for years to come.

Volunteers and donors in Platteville know what it takes to make a community great. Philanthropy is charitable giving that benefits the greater good. By donating time, money or other assets and by working to support the growth and advancement of a community, everyone can become a local philanthropist. Just ask the people of Platteville.



▲ Built by and for the community, the outdoor fitness/exercise facility makes Platteville healthier.



▲ Staff and volunteers were excited to finally move materials into the new library in late June.

Argyle Shows Support of Critical Epilepsy Research



Mathias Koch and Family Leave a Legacy of Hope



From a rare form of epilepsy that didn't respond well to medicine, Mathias Koch passed away at the tender age of just seven months.

His family looked for every way they could to help cope with the tremendous grief that came from saying goodbye to their little boy.

His mom, Mandy, explains that, for her, grief is one of those interesting emotions: deep sorrow that forever changes you and continues to change you each new day. Since running gave her the ability to pound out her emotions and allowed her to feel pain and freedom at the same time, she thought there was no better way to honor Mathias and symbolize the steps it takes to face another day than by starting the Chunky Monkey (a nickname of Mathias) Epilepsy Run. It continues to be a way for her family to remember Mathias and help other children living with epilepsy.

Argyle and surrounding communities have been with them every step. The Chunky Monkey 5K Run averages 300 participants each year with more than 100 children participating in the Kid's fun run. When

starting it in 2012, Mandy set up a fund at the Community Foundation that allows tax-deductible gifts. In all, her fund and event money raised has granted more than \$50,000 for pediatric epilepsy research.

"There is nothing better than living in a community that will love and support its people," says Mandy. "We felt love from the first moment Mathias had his first seizure and have continued to feel that love and support since."

Mandy also credits the Argyle Community Fund for being a supporter of the run and says she is thankful for what it accomplishes throughout the community with its many transformative grants.

"Personally, the run has given me a platform to sort out the tangled feelings of grief by creating good in our community," Mandy explains. "As a family, we treasure that Mathias has a day to call his own, that we can celebrate his life and create a legacy in his memory."

This year marks the 6th annual event in honor and memorial of a sweet little boy who continues to do so much for others, even beyond his lifetime.



Monroe Couple Leave a Legacy of Adventure

Through a spirit of adventure that took them hiking in the Dominican Republic, climbing the Great Wall of China, exploring Native American ruins, and skiing the Alps, (to name just a few of their travels), John and Becky Wegmueller leave a legacy that will be celebrated forever, thanks to their children's everlasting love and a gift enabling others to carry on that same spirit.

Combine that venturesome nature with a deeply rooted dedication to their community and it is obvious why the John and Becky Wegmueller "Abenteuer" (*the Swiss word for "adventure"*) Scholarship is even more meaningful to their family.

"My dad was a steward of the land," says daughter, Sarah Kettenmann. "He was an incredible, progressive farmer that cared a lot about conservation and protecting habitats, and he was incredibly active in the local community."

"My mom was just perfect in every way. She always put a huge focus on education and encouraged all of us to excel both academically and worldly with a love of languages, culture, travel," Sarah remembers. "Together, my parents loved community. Like a good harvest, they really appreciated seeing it grow because of everyone's effort. Through this scholarship, it can and we will forever honor them as amazing people."



Bequest Pays Tribute to New Glarus

When Arnold W. Kehrli Jr. returned from serving in World War II, he came back to New Glarus, Wisconsin where he was born and raised. Taking over his father's retail cheese-making store and tavern that he bought in 1911, Arnold firmly planted himself in the only community he called home. He went on to marry Dorothy Stuckey (the minister's daughter) and raise a family. It was his life-long commitment to New Glarus that compelled him to keep supporting his town even long after he was gone. He did so by narrowing down his list of charities to ones he viewed as being of highest priority, those able to have the biggest impact locally, and greatest sustainability, and set up his bequest with his attorney. His list included the New Glarus Community Foundation.

"My dad was very proud of his Swiss heritage, and very proud of the local cheese-making history," says his son, Arnold "Bud" Kehrli. "He talked a lot about New Glarus and its Swiss culture. He wanted to make sure he paid the community back for all the good he got out of it," Bud says.

And while Arnold closed Kehrli's Cheese Headquarters at 526 1st Street in 1972, he opened his heart to his community with a gift that will be remembered for years to come. Arnold passed away in November, 2016, just two months shy of his 100th birthday.



A Place of Healing and Reflection A Symbol of Hope and Freedom

Green County Veteran's Memorial Park Honors Vets

The Green County Veterans Memorial Park is a place where the legacy of American military veterans can be recognized, honored and memorialized. It is a place for soldiers to meditate and heal, make meaning out of loss, and reflect about their comrades. It is a place for community to pay tribute and respect to our nation's freedoms. It is a result of tireless fundraising and hard work by a county coming together for an important cause.

An M-60 tank in the park represents the valor of those who served in WWI, WWII, and the Korean War. Early this year, the GCVV Park Committee reached one of its goals and secured an historic Vietnam War Huey helicopter through Craig's List after years of trying. It sits in the park and serves as a remarkable tribute to the brave soldiers of the Vietnam War – the first war to use helicopters for the battle-transport of troops and medical evacuations that saved many lives. Most recently, a beautiful gazebo was built that will feature a Wall of Honor and the names of all veteran's from Green County.

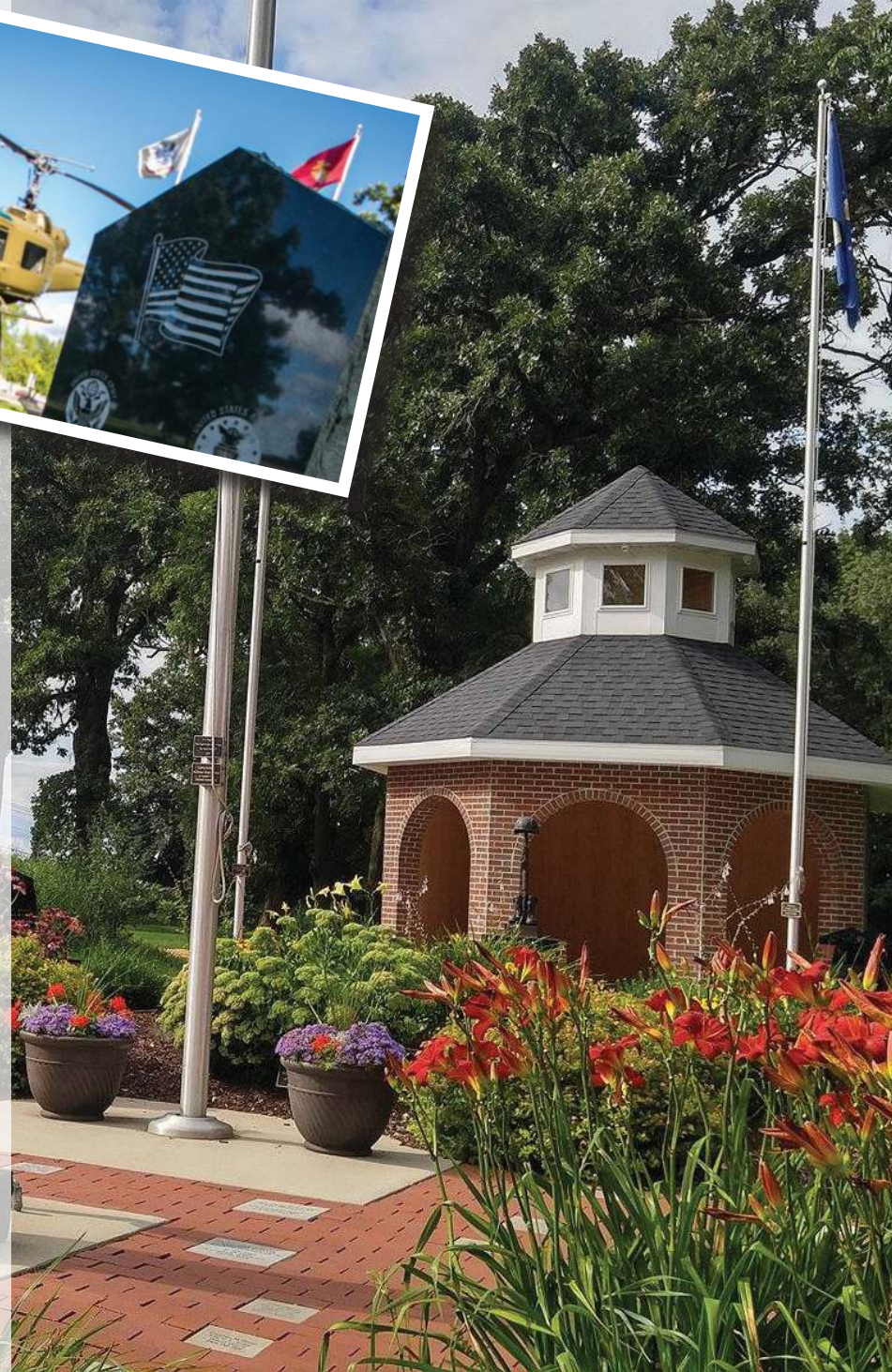
Jackie and William Hustad have not only served in the park's planning and fundraising efforts which began in 2004, they both have a deep, personal understanding of the sacrifices members of the armed forces and their families have made and continue to

make for our country. To them and many along-side them, the Green County Veterans Memorial Park serves also to help advance the cause of freedom and peace.

"This is certainly a very meaningful place for all vets," says William, who served in the Vietnam War. "It's a beautiful place to reflect and contemplate and remember, but it's also a place to educate everyone, foster hope, and honor what we have because of them."

In all, the group raised \$150,000. It looked to the Community Foundation of Southern Wisconsin to manage its fund and received grants for various projects that came at a time when the group could have easily surrendered because of lack of funds. This year, a grant paid for the installation of security cameras to also "serve and protect."

"Partnering with the foundation gave us credibility with donors early on that we were managing their gifts well and as intended," says Jackie. "Doing so had so many benefits such as increased publicity and the leverage that if the foundation believes in our project, then others could too. We couldn't be more grateful for all the foundation has done for us, and to a large degree, our veterans."





Film and Fund Support Needs of Women and Girls

Though her brothers went to school, Suma was forced into bonded labor at age 6. The Nepali girl endured years of grueling work by expressing her sorrow in music and lyrics. Suma glimpsed a different future by learning to read, the first step on the road to freedom for her and other girls like her.

Last January, more than 100 guests attended the showing of the powerful film, *Girl Rising*, in Janesville, Wisconsin. The inspiring film features role models and success stories highlighting actions that real people have taken to break down the barriers girls face in our world. It was the perfect message to help share the story of the Community Foundation's The Women's Fund.

The mission of The Women's Fund is to provide a permanently endowed funding

source to non-profit agencies serving the needs of women and girls in Rock County.

In 2015, The Women's Fund held three community forums to identify the current needs that exist for local women and girls. Topics centered on women's and girls' health and wellbeing, finances, and education.

In each forum the issue of mental/behavioral health surfaced, which made that topic the focus of the fund's grantmaking in 2015 and 2016.

"We know that when we lift up girls, especially through education, our entire community benefits. Education is key to empowerment and overcoming barriers to success," says The Women's Fund creator and advisory board chair, Sue Conley.

"Supporting women and girls and tackling the barriers are vital to building stronger communities and a better society overall."

The fund recognizes that philanthropy can help lead the way for progress on numerous intersecting women's issues, including women's rights, health care, and education.

The *Girl Rising* event not only captivated the audience with its look into the sometimes unimaginable stories of international girls and young women, but informed attendees of concerns facing local women and girls served by the organizations who received The Women's Fund grants: CASA, HealthNet, House of Mercy and Rock County Human Services.

"We wanted the audience to understand the important role educating girls plays in

advancing healthy families, communities, nations and the world," Sue says.

The Women's Fund Advisory Board is currently evaluating the specific outcomes and impact of the mental/behavioral health grants awarded to determine its grantmaking focus for 2017 and beyond.

Events like *Girl Rising* and the community forums continue to increase awareness of real-time issues facing women and girls, and raise critical funds to further support local women and girls throughout Rock County.

Today, Suma is a certified Community Medical Assistant pursuing a more advanced medical course that will allow Suma to open a medical clinic in her village where there is currently no doctor.



Milton Trivia Night Applauds Brains and a Birthday



At its first Trivia Night event, the Milton Fund attracted gifts to the fund and had a lot of fun in the process. Nine teams made up of local residents, business people, and the school district pitted their wits against each other to raise support that goes right back into the local community. In all, the event came very close to the Fund's goal of raising \$3500.

Milton Fund Advisory Board Member, Betsy Lubke, says for a first-time event, Trivia Night was successful on many levels.

"We had great sponsors and the participants had a lot of fun with kind-spirited, high energy competition," says Betsy. "It is so important to support our local community and its non-profit organizations in meaningful ways. The Milton Fund does that by providing grants that help people right here in Milton." Led by trivia master, Rod Hilton, and his

wife Nancy, participants strategized answers to questions about science, finance, history, language, cultural arts, and more. If stuck, they could bid on available experts to share their knowledge.

Once again, the Milton community stepped up for sponsorships for the event with food provided by Piggly Wiggly and the venue offered by the Gathering Place. Taking home the winning trophy donated by American Awards and Promotions, The Misfits claimed this year's overall bragging rights and included Sue Hilton, Terri and Tom Lieder, Jan Carwardine, Carol and Terry Astin, and Pastor Steve from Milton United Methodist Church.

In addition to celebrating a successful event, the Milton Fund also honored its 20th year of supporting the community. To date, the fund has reinvested more than \$123,000 into local projects.

Evansville Fund Celebrates 20 Years

One Fund Attracts Several More in the Family of Funds



E. Susan Eager wanted a way to give back to the community that she strongly felt served her well. With the encouragement of her attorney, she made a \$6,200 gift and in 1996 the Evansville Fund was born.

Susan also established a donor advised fund and a scholarship fund. Upon her death, the family requested that the successor advisors of her fund be the Evansville Fund Advisory Board to reinforce Susan's legacy to community philanthropy. She created the first named fund for the Community Foundation of Southern Wisconsin – a fund that what would go on to serve as leverage for other funds adding to the family tree.

Seeing the value in establishing funds to support community vitality, other donors came forward. Joining the E. Susan Eager Fund are the Millie Tait Charitable Fund, Richard & Elaine Strassburg Fund, Alvin & Dorothy Helgesen Family Fund, Dr. Roger & Elizabeth Gray Fund, Meals on Wheels Fund, Clifford & Jeanette Fellows Fund, William C. and Thea Brunsell Fund for Elementary Education and two who choose to remain anonymous.

Now 20 years later, the Evansville Fund and its Family of Funds have given back more than \$110,000 to the community. **Happy Birthday, Evansville Fund!**

Original Scholarship Recipient Now Dean of Students in Janesville

After graduating from Parker High School with his sights set on becoming a dentist, Daniel Jackson headed to college at the University of Minnesota. He left there with a degree in African-American studies and minors in Public Health and Family & Social Science. But his path led him to further pursue interest in athletic administration through the Educational Leadership and Policy Analysis program at UW-Madison. It was back here in Wisconsin, though, that a visit with his high school wrestling coach who steered him toward becoming a teacher, suggested he look into the Janesville Multicultural Teaching Scholarship (JMTS) Program to help him afford the opportunity.

JMTS was created in 2007 to grow the percentage of teachers of color in the Janesville public schools. Selected students receive a multi-year renewable college scholarship of up to \$5,000 per year for tuition, books and fees. In return the student must pursue a degree in education, obtain Wisconsin state teacher certification, and apply for a position with the School District of Janesville when they have completed their degree.

The JMTS program's target is that Janesville students of color will return to the community as professional teachers and role models for all students. With Daniel Jackson, JMTS hit the bullseye.

Daniel completed his degree in K-12 administration and his teaching certification for 1-8th grade. He was hired as an At-Risk teacher at Edison Middle School in 2012. Three years later he was teaching 6th grade students in a Transitions class that focuses on college and career prep. In January 2017, Daniel was hired as the Dean of Students at Marshall Middle School.

"It means a lot to me to be in the district in which I grew up," says Daniel. "I wouldn't want to be anywhere else." Daniel credits JMTS for helping young people of color realize their dreams and says the scholarship program is highly beneficial as society moves with changing demographics and diversity. "Teaching is the greatest profession in the world to be able to positively shape and influence the next generations."

Daniel is so honored to be one of the first JMTS recipients, he didn't hesitate to say yes when asked to sit on its advisory board.

"I was so humbled when asked," Daniel remembers. "As an advisory board member I now serve as a mentor to a current recipient who happened to be in the first school I taught. I want him and all students to be inspired by what can be accomplished when you are given opportunities. That's pretty cool!"



photo courtesy of the Janesville Gazette

Meaningful Tributes of Time and Treasure



Meet Jeanne Hora

"I made a donation to the Hillsboro Scholarship Fund in memory of my grandmother, Marie Haugh Butcher. Marie was born in 1899 near Rockton, WI. There were no cars, no electricity, and no telephones. Yet, her family valued education and it took devotion and hard work to achieve an education in that day. She and her sisters and brothers walked to Rockton to grade school. In order to attend high school, her father drove her and her sister to LaFarge with a team of horses. He took them on Sunday afternoon and picked them up on Friday. They shared a room in town in order to attend high school. After high school, Grandma

attended the Vernon County Normal School to receive her teaching degree. Remarkably, her two sisters and two of three brothers also became teachers. Her two daughters and two granddaughters became teachers. Now, two great-granddaughters teach, one at a university. Marie was a Valley school board member and clerk for many years. It was she who made the motion for the district to provide free books so all students could learn from the same book. Marie was our family historian. For these reasons and many others, I honor my grandma, Marie Butcher." — Jeanne Hora



Meet Carol & Norm Aulabaugh

Carol and Norm Aulabaugh, Orfordville, have always wanted to give back to others because, they say, they have been given so much themselves. Over the years, the couple has established donor-advised funds and two scholarship funds to meet the needs of their community and make a difference in the lives of others. The Aulabaughs have gifted more than \$450,000 to CFSW in support of various projects and people in need. Norm says they chose CFSW because he's always been impressed with our management of funds.



Meet Tod Gillilan

On his 90th birthday, Tod Gillilan, a long-time business owner in Lancaster, decided to give rather than receive. Tod gave \$50,000 to the Lancaster Community Fund, in honor of his late wife, Rosa, and his parents, Everett and Madeline, who fostered his giving spirit. Thanks to the Gillilan Family Community Fund new additions to the community include the AED at the Senior Center and custom display cases for memorabilia of the local veterans organization. Tod is pictured here, *right*, presenting his gift to Rod Roggensack, *left*.



Meet Laurie Vierthaler

Laurie is serving her second term on the Monroe Fund's Advisory Board — a big task but one that, she says, gives her much more back in return. This year in particular, Laurie and the board received 50 applications from local students for school scholarships. Laurie organized them into an efficient, streamlined process and nearly all of the applicants received an award. "Knowing we met a need, made someone's life better is such an honor," says Laurie. "To be able to witness all the great projects and people the funds impact is truly a gift to me, too."



Meet Sarah Kyrie

Sarah Kyrie, Director of the Argyle Public Library, proves that when it comes to how educational a library can be, its size doesn't matter. A town of about 800 people, Argyle has been treated to many interesting and innovative programs typically seen in cities triple its size, all thanks to Sarah. She has added several exciting children's projects, hosted several presentations, and offered new hands-on learning opportunities for kids and adults alike. Sarah is now contributing her wisdom and talents to the Argyle Fund's Advisory Board!



The Power of the Gift

Donating to Your Favorite Causes Is Easier Than You Think

What does the Community Foundation do?

The Community Foundation of Southern Wisconsin is a tax-exempt, public charity. It was established in 1992 with the mission of matching personal tax-deductible gifts of all sizes to needs in all the communities it serves. The foundation manages a collection of permanent and temporary funds established by individuals, families and nonprofit organizations. Through a portion of the income earned on those funds, the foundation awards grants and scholarships that enhance the quality of life locally and regionally, now and well into the future.

The generosity of donors make it possible for the Community Foundation to make grants to nonprofit organizations whose work strengthens our communities and to award scholarships to area students. Through wise investment management and community leadership oversight, those gifts can multiply over time for perpetual grantmaking and scholarships that always meet current local need.

Why give to the Community Foundation?

At CFSW we understand that charitable giving is highly personal. While many donors do make direct gifts to their favorite organizations, some wish to provide ongoing support forever, beyond their lifetimes. Many feel more comfortable making those gifts through us because of our permanence, professional investment management, and oversight role to ensure their wishes are met by the recipient organizations.

Note: All funds are component funds of the Community Foundation of Southern Wisconsin. The foundation has exclusive legal control over all fund assets and has authority to redirect earnings and grants from the fund, if distribution becomes unnecessary, incapable of fulfillment or inconsistent with the needs of the foundation's service area.

How is the money I give to be endowed invested?

The Community Foundation of Southern Wisconsin brings together the financial resources of individuals, families, and businesses to support effective nonprofits in the communities. The assets are pooled and invested and that investment is overseen by wealth management departments of well-known, reputable banks. The Community Foundation adheres to an investment policy established and approved annually by the Asset Management Committee, made up of investment professionals, and our Board of Directors.

How can I be sure my money will be used as I've specified?

As a donor, you get to specify your giving goals. We then draw up a fund agreement that is tailored to your goals. A fund agreement is our way of ensuring that what you want your gift to accomplish is documented. It is also a legally binding agreement between you and CFSW. The law prohibits us from changing the document and the original intent of your gift. We help ensure that charitable endowment gifts remain effective and relevant over long periods of time.

I read about Required Minimum Distributions from my IRA. How does that work with charitable giving?

In 2015, the PATH (Protecting Americans from Tax Hikes) Act made the IRA charitable rollover tax incentive permanent law. That means if you're age 70½ or older, you can distribute the Required Minimum Distributions (RMDs) and additional dollars up to \$100,000 per taxable year, to an eligible charity without a withdrawal penalty. In other words, giving from your IRA is easy because these distributions are made payable directly to the charity you choose, and your money that's gifted is free from federal income tax! Please work with your financial advisor, attorney, accountant and/or IRA administrator for details. Also, remember to advise CFSW of your donation indicating the fund(s) that should receive your gift.

Gifts to Show You Care about Your Community

Donors who create a fund with the Community Foundation find this an easy and convenient way to manage their charitable giving. As a fund creator, you personalize your fund by choosing its name and establishing its purpose. We design giving to match your unique interests and financial circumstances. **Your Fund. Your Cause. Your Life's Legacy.**

TYPES OF FUNDS

Community Funds Allow 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 of other advisors named, to recommend grants to specific agencies and institutions or to specific program fields.

Designated Funds Allow 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 Allow donors to target gifts to 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.

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.

GIVING OPTIONS

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 taxability.

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 or contact your regional Donor Services Rep. (See page 6.) We also recommend connecting with your personal financial advisor or attorney for a closer look at the tax-savings benefits.

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 approves a spending policy for grant-making in the coming fiscal year. The spending policy of each endowment will be a percentage between 4% and 6% of its average market value over the 12 trailing quarters.

Bestow a family gift.

Back in 2005, philanthropic organizations began research on the wealth potential in Wisconsin. The study, called the **Transfer of Wealth**, explored the potential gains from one generation transferring their assets to the next generation at the time of death. What was discovered was that Wisconsin stands on the cusp of a substantial wealth transfer.

It found that, during the next 50 years, Wisconsin will experience an estimated \$687 billion in inter-generational wealth transfer. If just five percent of the wealth being transferred over the next 10 years were pledged to community-based endowments, a cumulative endowment of \$5.3 billion could be created. Such a collection of endowments, prudently invested and managed, and often offering tax incentives, could generate \$263 million of charitable investments into communities each year.

The Community Foundation of Southern Wisconsin encourages you to think about your assets as potential gifts. For example, do you know you can list us as a partial beneficiary of your retirement account or life insurance? What an impressive legacy to your community that would be!

Check out all of our gift options at left, then call us to learn more!

Source: Wisconsin Philanthropic Network



We're here to help!



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

Rock-Walworth Counties



Grants

Our grantmaking averages nearly \$2 million per year and covers a wide range of focus areas including education, community development, economic development, health and human services, arts and culture, the environment, animal welfare, public safety and more.

Grants are offered to 501(c)(3) non-profit organizations. Many of the grants awarded by the Community Foundation are from Donor Advised Funds established to serve the charitable wishes of the donors.

For a list of available grants, visit **www.cfsw.org**

Scholarships

At CFSW, we assist students by serving as a scholarship resource for both high school graduates and older students. Each year the Community Foundation awards more than 500 scholarships across the Southern Wisconsin region.

Established to honor or memorialize a loved one, to recognize a specific academic institution, or to support a particular field of study, Scholarship Funds make it easier for students pursuing post-secondary education at a college, university or technical school.

The availability of scholarships is publicized through local high school guidance offices. Each scholarship is distinct and recipients are selected in accordance with criteria established by the donor.

EIE Funds

Each year, The Community Foundation gives out more than \$250,000 to local schools in the form of Excellence in Education (EIE) funds. EIEs are a means to strengthen our schools with the use of private charitable resources.

EIE funds are awarded for the benefit of school district students and staff. They encourage creative and innovative educational programs, recognize and reward outstanding achievement, and encourage local business, civic and community involvement in schools. EIE funds operate independently of school board oversight and typically fund projects unfunded by any other source.



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Southwest Region



Linda Gebhardt
Donor Services Rep
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(608) 328-4060

Green-Lafayette Counties

Board of Directors



Ken Klaas
Chair
Grant County
Field Service Manager
TDS Telecom



Ron Spielman
Immediate Past Chair
Green County
Special Project Advisor
Monroe Clinic



Lois Smith
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Rock County
Professor, Marketing
Retired, UW-Whitewater



Cindy Tang
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Jim Cripe
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Bobbie Bernet
Green County
Retired Postmaster



Laura Carney
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Nurse Practitioner
Whitewater Family
Practice



Carol Hatch
Rock County
Attorney
Nowlan & Mouat



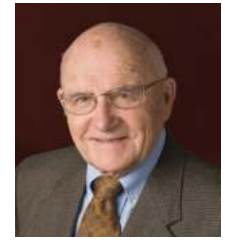
Cheryl Mader
Crawford County
Project Leader
Community
Development Alternatives



Julie Wilke
Green County
Retired
Vice President
Monroe Clinic



Bill McDaniel
Lafayette County
Attorney
Johnson, Karanz &
McDaniel



Alan Dunwiddie
Director Emeritus
Rock County
FOUNDER



Jennifer Revels
Rock County
Owner
Revels Consulting, LLC



Paul Mair
Rock County
CPA, Shareholder
Summit Accounting
Group, Inc.

Founding and former board members

Larry Barton
George Brunner
Robert Collinst
John Condont
James Cripe*
Barbara Daus
David Deininger
Alfred Diotte*†
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Gregory Galvan

Patricia Graham
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Melita Grunow
Patricia Guttenberg
James Hartwig
Rhonda L. Hartwig
Linda Heckert
Geraldine Hedberg†
John Henderson
Margaret Hollenberger
Dick Jaeger
Ann Johnson

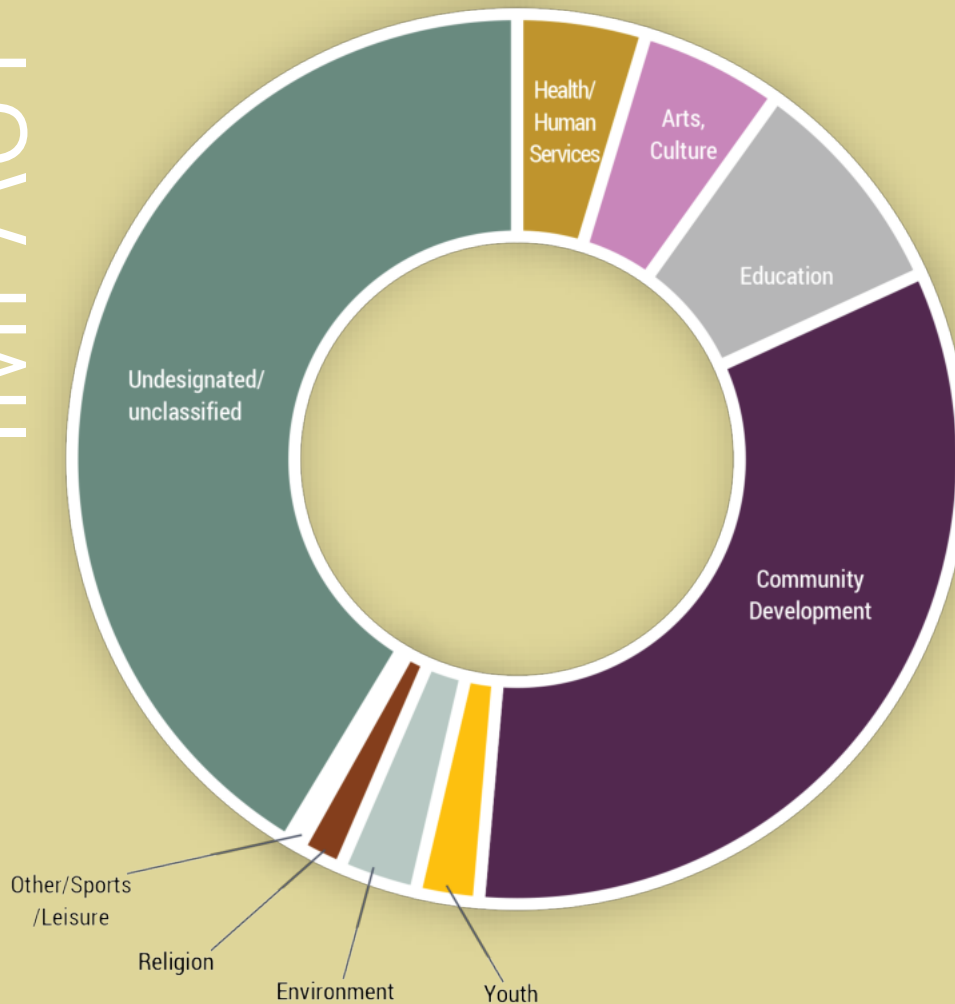
Marshall Johnston*†
Martin Kennedy*†
Sharon Kennedy
Stephen King*
John Kundert†
Robert Lisser
Tina Lorenz
David MacDougall†
Timothy McGettigan
Lance McNaughton
Lois Merrill
Carolyn Mowbray*

Joan M. Neeno
Jane Nelson
Joseph Nemeth
Steve Olsen
Phillip Reuter*†
Rod Roggensack
Rick Rolfsmeyer
Ray Ropers
Tom Rowe
Mike Sanders
Janice Schmidt
Steve Sheiffer

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

† deceased
* Founding Board Member

IMPACT



SUPPORT

\$1,546,411	UNDESIGNATED/UNCLASSIFIED
\$1,243,680	COMMUNITY DEVELOPMENT
\$308,504	EDUCATION
\$194,092	ARTS, CULTURE
\$175,890	HEALTH/ HUMAN SERVICES
\$106,448	ENVIRONMENTAL
\$86,036	YOUTH
\$60,362	RELIGION
\$11,654	OTHER (animal, international, philanthropy)
\$7,935	SPORTS/LEISURE

TOTAL
GRANTS

\$3,741,012

AWARDED TO MEET
VITAL COMMUNITY
NEEDS

*includes grants from agency funds/not reflected in audit.

Statements of Financial Activities

Years ending June 30, 2017 and 2016

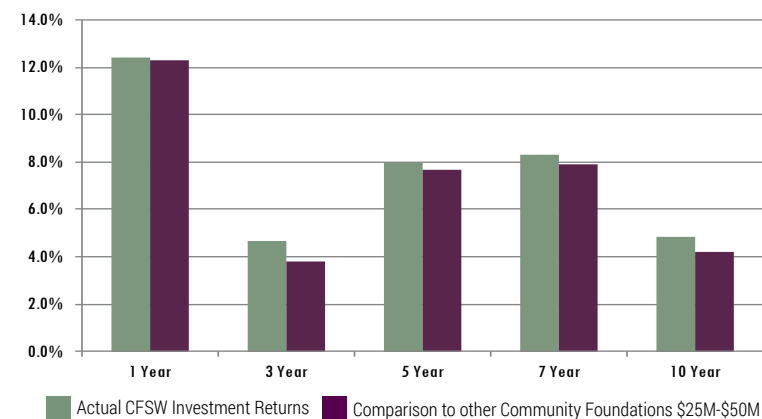
REVENUES AND GAINS	2017	2016
Contributions	4,307,855	4,667,532
Investment and other revenue	5,605,048	456,538
TOTAL REVENUES AND GAINS	\$9,912,903	\$5,124,070

GRANTS AND EXPENSES	2017	2016
Grants and program expenses	4,549,003	3,863,078
Management and general	433,468	364,144
Fundraising	59,332	96,982
TOTAL GRANTS AND EXPENSES	\$5,041,803	\$4,324,204

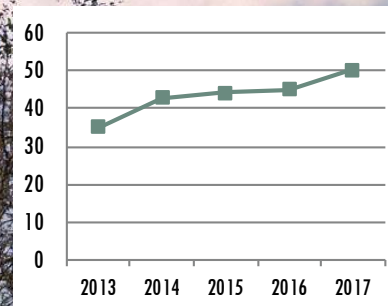
CHANGE IN NET ASSETS	2017	2016
Increase in net assets	4,871,100	799,866
Net assets, beginning of year	40,337,368	39,537,502
NET ASSETS, END OF YEAR	\$45,208,468	\$40,337,368

Gifts 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.

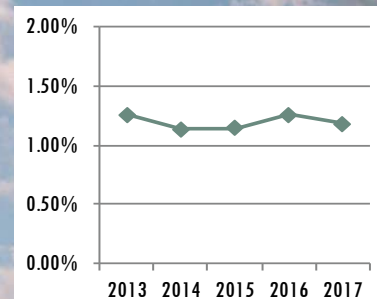
Investment Performance



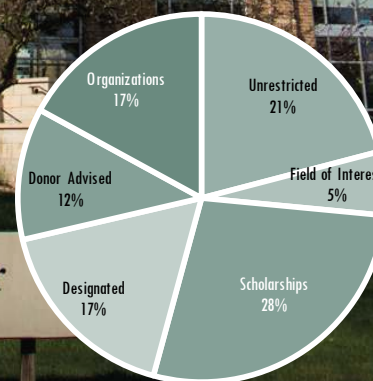
Growth in Assets (in millions)



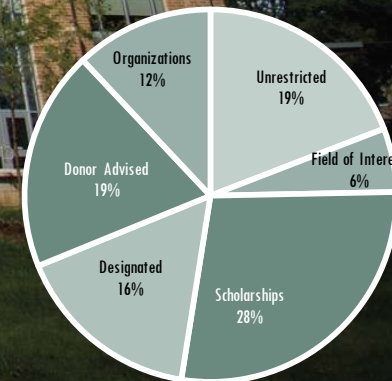
Operational Expenses (as a percentage of assets)



Assets by Fund Type



Grants by Fund Type



Monroe Arts Center

www.monroeartscenter.com

Special thanks to Wegner CPAs for
sponsoring this report.



Contact us throughout our Nine-County Region



www.cfsw.org



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Jane Maldonis, Rock/Walworth Donor Services Representative • jane@cfsw.org
Allison Hokinson, Communications Director • allison@cfsw.org
Jackie Ommott, Grant and Scholarship Manager • jackie@cfsw.org
Lannie Troon, Gift & Grant Manager/Administrative Assistant • lannie@cfsw.org

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Kristine O'Connor, Administrative Assistant • kristine@cfsw.org

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

Barb Daus, Southwest Wisconsin Donor Services Representative • barb@cfsw.org
Andy Custer, Administrative Assistant • andy@cfsw.org