

COMMUNITY FOUNDATION OF SOUTHERN WISCONSIN ANNUAL REPORT 2017-2018



23

years

WITH SINCERE GRATITUDE TO OUR DONORS, VOLUNTEERS, AND COMMUNITIES

Thank you for serving, trusting, sharing and...

Dear Families, Friends, Colleagues and Neighbors,

In 2017, the Community Foundation of Southern Wisconsin celebrated 25 years of matching personal philanthropy with community need. Back in 1991, local resident and retired bank professional, Alan Dunwiddie, was working with investments and individuals interested in creating scholarships for local students. (Read his story on page 13.) Fueled by the notion that this could be something much bigger and be managed organizationally, Alan approached his friends about starting a community foundation to not only direct scholarships but raise and manage funds that could transform communities for the greater good. His vision at the time was, "well let's see what we can do." Twenty five years later, what started with just \$5,000 is now more than \$55 million. Suddenly the "we" in his comment takes on a far bigger significance.

Growth is rarely by accident. It is the result of all the right elements working together to stimulate progress. The Community Foundation of Southern Wisconsin's growth embodies the phrase, "We are **better together**." It's not a new phrase. In fact, it has been used in many contexts. That's because teamwork creates accomplishment.

When Alan started the foundation, he enlisted the help of friends. As a group, they raised the funds to start it. They were **better together**. By pooling gifts, funds reach endowment levels that can last forever. **Better together**. When staff meet with prospective donors and guide them through charitable giving decisions that meet their needs and keep causes closest to their hearts, we are **better together**. By helping students reach post high school educational goals through scholarships, and teachers grow their projects through grants -- the power of "we're **better together**" is evident. When grants inspire positive change and impact lives for the better throughout our communities, "**better together**" shines.

Thank you for 25 years of getting better together by giving and sharing throughout the communities we serve. It is your trust, loyalty, and support over the past quarter of a century that makes working with the belief that we are **better together** a continued commitment.

With gratitude,

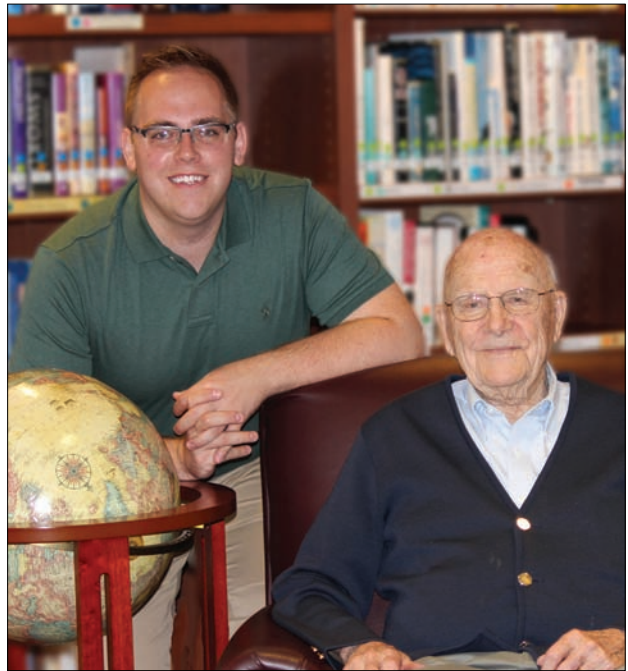


Wyatt Jackson
President/CEO



Ken Klaas
Board Chair

For Good. For Ever.®
We are better together.



▲ President/CEO, Wyatt Jackson, gets global perspective on the Foundation from Founder, Alan Dunwiddie.

For 25 years now...

...the Community Foundation of Southern Wisconsin has been powered by a solid history of partnerships, collaborations, and relationships that strive for common outcomes and bolster the intended social good.

Thank you!

Alan Dunwiddie, a life-long resident of Janesville, shares his vision for a community foundation with five like-minded individuals. Alan advances the idea of a community foundation with endowed funds to which any and every citizen can donate.

1992

July 1992, the United Community Foundation is formally recognized by the IRS as a 501(c)(3) public charity serving Northern Rock, Green, Jefferson, and Walworth counties. Initial assets are \$5,500. Within six months, assets increase to more than \$300,000. C. Pete Evans Wanner becomes the first executive director of the Foundation.

Founding board members (pre-July 1992): Alan Dunwiddie, Jim Cripe, Martin Kennedy, Gary L. Smith, Phillip Reuter, John Steil. First board members (added post-July 1992): Al Diotte, Marshall Johnston, Steve King, Carolyn Mowbray, Joan M. Neeno.

1992



2017-2018

IMPACT AT A GLANCE



Total Funds
680

Our Mission

*We Match Personal Philanthropy with
Community Need. For Good. For Ever.®*



Number of Gifts
7374



Awarded Grants
891



Awarded
Scholarships
569

Total Grants



\$2,806,893

Total Scholarships



\$868,684

\$3,675,577

The total amount of grants
awarded throughout our service
area to enhance communities
and give students opportunities
beyond high school.



Total Assets

\$55,887,374

1993

Twenty-five donor agreements are signed. Cecelia Howe, age 93, establishes the first endowed fund with a gift of \$50,000. The Cecelia Howe Scholarship Fund benefits graduating seniors from Craig High School where she taught for 40 years.

The first grants from the Unrestricted Fund, B&MK Fund, and the Cabin Fund are awarded.

1994

1995

The first mission Statement is created: "To help the citizens of southern Wisconsin create enduring charitable contributions in their communities."

Feeding a Critical Need for School Kids

Featuring The Milton Fund



For most children, the end of a school year means the start of swimming with friends, bicycling around the block, and family cookouts. But for the seven percent of families living in poverty in Milton struggling to put healthy meals on their tables daily, summer also means no longer having access to school lunches, and consequently, hungrier kids.

Milton United Methodist Church knew that its mission and this critical local need intersected and launched the city's first free summer lunch program that ran from June through August. The program provided kids a sandwich, snacks such as fruit, granola bars or chips, and bottled water every Monday through Friday at Lamar Park in Milton.

The program's original goal was to serve the 400 local school district students who receive free or reduced lunch. Thanks to strong community interest in volunteering and giving generous gifts, more than 2600 meals made their way to the mouths of many kids. One source of support, The Milton Fund, awarded a grant to the program for food-transport coolers, banners, a storage cabinet, and food.

Barb Braun, Milton United Methodist Church outreach coordinator, who started the program, said getting the community involved was both intentional and important. "This is a community issue that can be helped with community support. It was extremely successful because of everyone's generosity."

The truest measure of success, however, comes from the families the program benefitted. "My children enjoyed lunch several times this summer, and made friends, too," says a local mom who accessed the free lunches. "We are grateful for programs like this that give families one less worry in our lives and show kids that people do care."

The "United Community Foundation" changes its name to the "Community Foundation of Southern Wisconsin, Inc." to better reflect the geographic service area.

1995

The Monroe School District consolidates 13 scholarships into one Monroe School District Fund with CFSW. Since then more than 50 additional scholarship funds have been established for the Monroe School District.

1995

1995

The Community Foundation accepts its first gift of closely-held stock to create the Schilberg Park Fund, in Milton, WI.

Caring for Caregivers and Their Loved Ones

Featuring Donor-Advised Fund: The Don Adee Alzheimer's Disease Fund

According to many caregivers of loved ones with dementia, Alzheimer's and other related diseases, building a support system is a key component to managing care for the entire family. One family touched personally by that experience established a fund at the Community Foundation to ensure local families get the help they need as they care for a loved one with memory loss issues and disease. The Don Adee Alzheimer's Disease Fund (DAAD Fund) carries on Don's name and also provides support for vital local services.

Cori Marsh, Dementia Care Specialist at the Aging and Disabilities Resource Center of Rock County, thanks the DAAD Fund for helping her add to the program's mission. The organization has used gifts from the fund to buy educational materials and books for family caregivers, and this year, treated 75 caregivers to a night out to see a comedy show where they could laugh and relax. Funds from the DAAD Fund also support the agency's *Caregiver Boot Camps* – two annual, free full-days of support and education for family caregivers, which to date, have strengthened more than 60 families. This year, Cory implemented Caregiver Pizza Parties – a casual, unintimidating gathering that offers a safe and comfortable place for entire families to share their stories and be inspired by others. While the fund provides food and other refreshments, the nights give families companionship and emotional tools to help them in their daily lives. And one night served as an avenue for public advocacy, such as strategizing about the group's trip to Washington, DC to meet with government officials about furthering research and program support.

"This disease still has such a stigma to it. It is nice to get together with others that are going through the same or similar issues," says Leann Curry, whose husband has Younger Onset Alzheimer's Disease. She, her husband, and their daughters, ages 15 and 17, attended the pizza party night to connect and share with others. "My husband, who rarely talks openly about his disease, was comfortable enough to speak up. Both of my girls also shared their stories and concerns. I was extremely proud of all of them," Leann remembers.

A Donor Advised Fund allows you to create a charitable legacy. Its flexibility allows you to manage your charitable giving and offers the ability to create a multi-generational family legacy with meaningful and personal social impact.

Visit www.cfsw.org for details!



The New Glarus Community Foundation is established as the first community fund.

1996

1996

Spurred on by a \$100,000 anonymous challenge match, Monroe establishes the second community fund. The anonymous donor is later revealed to be Rudy "Big Rudy" Regez.

The Milton Fund is established.

1996

Giving Because it Feels Good

Featuring Ruth Ann Potts, Donor

Nearly twenty-five years ago, CFSW Founder, Alan Dunwiddie approached his neighbor at the mailbox and struck up a conversation about giving to the Community Foundation. At first, Ruth Ann Potts told Alan she didn't have a lot of money to give. When he explained you didn't need a lot to make a difference, Ruth Ann took notice.

"I was a school teacher," explains Ruth Ann. "I was busy and appreciated the fact that the foundation would take care of even the small gifts I could make back then to area organizations."

Ruth Ann retired from 36 years of combined teaching at Marshal and Franklin Middle Schools in Janesville, and began reflecting on all that she considered she was given in her life. She felt it was more important than ever to support people and projects in a community filled with good memories and one she called home for more than 60 years.

Now, at age 83, Ruth Ann's giving plan is a result of careful and calculated homework on the organizations she cares most about.



▲ Ruth Ann Potts made a gift from her fund at the Community Foundation of Southern Wisconsin to Rotary Botanical Gardens for the creation of a new wellness garden. The dedicated bench reads her words of, "Hope Our Guests Find Inner Peace." Ruth Ann volunteered at the Gardens for more than 17 years and considers it one of her charities of choice when it comes to giving back.

Photo courtesy of the Marsha Mood.

"The Community Foundation of Southern Wisconsin gives each us the power to create our own legacy by setting up funds that offer others the ability to keep doing their good work forever."

— Ruth Ann Potts

Her standards are high: she gives to local agencies that have measureable outcomes of helping people, she requires that 80% or more of her gift goes directly to clients in need, and asks for reports of the work being done. Because of those high standards, Ruth Ann gets much happiness from giving back knowing her gifts are having impact, and credits the Community Foundation for helping her manage her gifts through her will set up with her attorney.

"It's fun to share," says Ruth Ann. "The Community Foundation is a wonderful organization. Celebrating its 25th anniversary is testament that I am putting my money in a place that is well managed, professional, and solid. I know the foundation and my directed gifts will carry on well beyond my lifetime."

Ruth Ann estimates she has had more than 10,000 students cross her teaching path and continues to see students from years past. Only now, instead of teaching Home Economics and Careers, Ruth Ann is the textbook example of paying it forward from the heart.

E. Susan Eager, working with her attorney, Jim Cripe, makes a gift to establish the Evansville Fund in December.

1996

From borrowed office space on South Parker Drive, the Community Foundation moves one block west to 111 N. Main Street.

1997

Iowa and Lafayette counties are added to the Foundation's service area.

1997

Bank One (now Wisconsin Bank & Trust) donates office space to the Community Foundation's donor services representative serving Green and Lafayette counties

1997

Teaching the Art of Kindness

Featuring The Blanchardville/Hollandale Area Fund

Along WI-39 in Hollandale, Wisconsin sits a former immigrant artist/dairy farmer's home that has become known as one of the Midwest's premier art environments. Nick Engelbert's Grandview home and farm is now a unique sculpture garden, house and museum and a place where students, artists, and teachers come to learn, discover, and create. Since 1999, Grandview Academy has been hosting summer art classes from May to August, and this year's Grandview Summer Arts Academy for young students, in particular, got a little help from the Blanchardville/Hollandale Area Fund (B/HAF).

For two weeks this past August, the Academy brought in two local professional artists who not only taught technique and skill, but in a more powerful way, helped students realize that art is valued, needed and appreciated. They taught them that their voice within the creative process is an equally important tool to use.

For the first week, artist in residence, Dan Slick, and local art teacher, Sally Schaller, encouraged students to work collaboratively as a team to develop ideas that used recycled, reused, and repurposed materials to build a sculpture that would be set up on the banks of the Pecatonica River for the area's Art on the Pec event. "Snappy the Turtle" made its debut at more than 10 ft. wide by 15 ft. long and staked claim along the water route and on the backside of the local golf course for all to see.

"Kids took their families kayaking and canoeing to see it," says Academy coordinator and retired art teacher, Marilyn Rolfsmeyer. "The students were so excited to have their projects looked at by adults as pieces of value. They felt, as they should have, that they were doing artistic work like real grownups – highly creative work that was getting the attention of the community."



The second week, artist in residence, Heidi Hankely, taught students lessons in non-representational art – art that is full of self-expression in abstract form. Students were inspired to experiment with textures, colors, and materials, and, at times, gained lessons in chemistry as they blended various media in their creations.

According to Marilyn, the grant from the B/HAF is more than supporting art for young people; it shows that the community is invested in people, community-building projects and programs.

"We make sure we tell the kids that the community brought this here for them and the grant made it possible. We even show them the big check display, too," says Marilyn. "We wouldn't have been able to bring in local professional artists of that talent without the support of the fund. It was an extremely successful two weeks. We are very grateful."

The two weeks even culminated in a unique *culinary art* event: a pizza party using the newly constructed wood-fired pizza oven.

Alan Dunwiddie, Marsh Johnston and John Steil are the first board members to complete two full terms of service.

1998

More than 200 funds have been established. Service expands to Grant County.

1998

1998

The South Wayne Area Community Fund is established.

Darlington establishes a community fund.

1999

Restoring Love and Life in an Old Building

Featuring The Darlington Community Fund



▲ The first floor restoration proudly stands completed and phase two of the project is slated to begin in January 2019. ▼ Driver Opera House Board Member, Kalee Crist, gives two thumbs up to the top floor prep work.



A gift to the Community Foundation of Southern Wisconsin strengthens your community! Give today at www.cfsww.org

Built in 1883 by Josephus Driver of Yorkshire, England, The Driver Opera House in downtown Darlington, WI originally served as a flat floor Opera House for traveling theatre groups of that era. After hosting groups for much of its early history, the Opera House staged American Legion dances during the 1940s with the last dance taking place in 1951.

Like many old buildings over time, and after damage by flood waters, it was in need of significant repair and preservation as a local historic treasure. It sat without an aria heard or a dance tapped since 1951... until now, that is.

A group of historically passionate community members saw the gem that it was, purchased the building in 2012, applied for it to become its own non-profit organization, and started a campaign to raise \$2 million for phase one of the building's restoration. The Darlington Community Fund played a small part in awarding the organization grants for the beautiful undertaking.

The Driver Opera House Restoration Project Phase One is now near completion and included making the building structurally sound, flood proof, and ready for retail space on the first level. Had the countless volunteers, donors, and inkind supporters not stepped in when they did, the building likely wouldn't be around today.

The next phase will start in January 2019 and includes the upstairs Opera House – a project that is slated to cost significantly less than the first phase, but one that is equally important as a piece of the past that is sure to draw visitors to the city's downtown district.

"There are tremendous possibilities here," says Angie Thuli, Director of Main Street and Driver Opera House Board member. "This venue is sure to attract significant public use through local theatre performances, dance lessons, concerts, poetry recitals, art exhibitions, creative workshops, and even wedding receptions."

Angie credits the community and its support, small and large, for making this project happen and says every gift helps to show that there is belief in this project and recognition that it adds value to tourism, shopping, dining, and more.

As for the star of the show, that has to go to the Driver Opera House itself as a shining example of what can happen with community pride.

Emily and Keith Tiedemann make a gift of \$20,000 to establish the Lancaster Community Fund. Keith dies in 2007. The Tiedemann's have made arrangements to bequeath an estimated \$2.4 million to the Lancaster Fund upon Emily's death.

1999

"For good. For ever." becomes the registered tag line of community foundations across the United States.

2000

The Argyle Community Fund is established.

2000

A Donor Service Representative is added for Grant and Iowa counties.

2000

Helping Kids and Community Smile

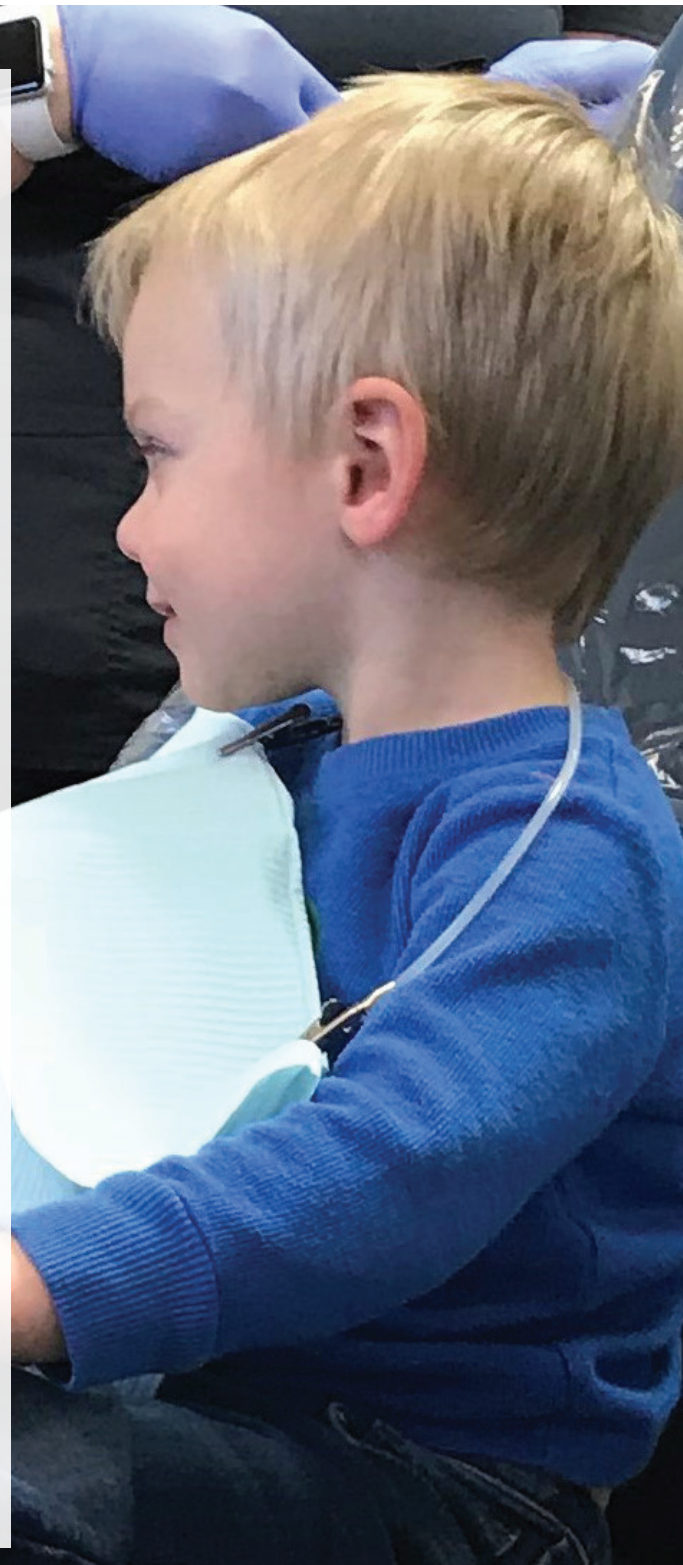
Featuring The Monroe Fund and the Lysaght Fund

A Green County community assessment in 2009 revealed a significant need for dental care throughout the area for underinsured or uninsured children, ages 1 to 12 years. Concerned, a group of caring people got together to start the Fowler Dental Clinic, named after a local dentist who passed away and whose equipment helped outfit the start of the clinic.

The non-profit, clinic served 51 children that first year. In 2017 more than 310 received care. Facing rapid patient growth even after an expansion, the clinic was notified that the building they called home was going to be razed and replaced. They needed a new home. That fall, the clinic partnered with a pediatric dentist and the Monroe Clinic to offer hospital-based rehabilitation services for children with more severe dental needs. That partnership turned out to be a key component to the clinic's move and ultimately their plan for sustainability.

When a building on the Monroe Clinic campus became available, its President, Michael Sanders, thought of the Fowler Dental Clinic right away. With shared missions of providing care the Fowler Dental Clinic and the Monroe Clinic will support further development of pediatric partnerships and expand education and prevention methods. Getting the building ready and equipped for a dental practice would cost more than \$250,000. A significant portion of that came from a grant from Delta Dental, while approximately \$80,000 came from the generosity of in-kind labor and donations from the subcontractors at the Monroe Clinic. That's the building portion. It will cost Fowler Dental Clinic nearly \$16,000 to move the equipment alone. The Monroe Fund and the Lysaght Fund contributed \$7,000 to help transport and set up the complex dental equipment and help get the clinic running again by late October.

"The support we've received has been remarkable," says Deb Douglas, Clinic Executive Director. "The Monroe Fund has been wonderful in its support of so many projects throughout the community." Deb says she and her team are excited to open the new clinic and look forward to a hosting community open house. "It's going to be an outstanding new home for the dental clinic!"



Edgerton establishes a community fund.

2001

2001

Monroe establishes the first Excellence in Education Fund.

The Platteville Community Fund is established.

2002

Encouraging Rural Communities to Fulfill Big Dreams

Featuring The North Crawford Community Education Foundation

Ask anyone who grew up in a small town what they loved or still love about it and chances are you'll get answers along the lines of, "there's a collective sense of ownership and pride of community." "You could always count on your neighbors for help." "Everyone is friendly here." The same answers turned into the right ingredients for building educational endowments for the North Crawford School District.

The North Crawford Community Education Foundation began in 2016. Tarasa Lown, who worked for the North Crawford School District, researched options for building endowments to benefit the school. The school administration and school board established the NCCEF Scholarship Endowment with the Community Foundation, while work continued on recruiting a group of local community people to advocate for private support of the School. An advisory board was formed, with Chuck Bolstad as board chair. The board expanded its vision to include building an Excellence in Education endowment that provides funding for special projects within the school.

The communities in the North Crawford School district have a long history of supporting educational opportunities for their students and teachers even during challenging times. The area faced three horrific floods in the past 10 years. While in many communities repeated disasters change donor capacity, residents in the North Crawford school district maintained their focus on the support of education.

"In our case, it starts with the people involved. The Fund's advisory board exemplifies what it means to be good role models," says Chuck, NCCEF advisory board chair. "The board had 100% gift participation at the start, several board members encouraged family members to make a charter donation, and we also received charter donations from local service clubs," Chuck explains.

Offering flexible giving options such as allowing people to commit to the charter donor amount but pay for it over three years was also an important success factor.

Another element to the group's endowment building achievement was



its ability to raise funds in response to a critical growing need: The school district is located in a very economically challenged area of Wisconsin. The scholarships awarded are much needed by high school graduates. Additionally, the impact of the Fund's Excellence in Education grants allows teachers and staff to create programs and projects not funded in the school district budget.

All this work would be impossible, says Chuck, without the ideal mix of success factors: the right people steering the committee, the group's tremendous effort in raising awareness of need, and a community believing in and generously supporting that need.

"I believe we are making a difference in local schools and in students' lives," says Chuck. He remembers the family with children who received post-secondary educational scholarships. That couple was among the first \$1000 donors.

"They said they were very grateful and wanted to pay it forward, says Chuck. "I always knew the North Crawford community was very generous. The support we've gotten proves that."

Our Excellence in Education Funds make school and student support easier than you think! Visit www.cfsw.org for details!

2002

Happy 10-Year Anniversary to us!
The Community Foundation celebrates a decade of matching personal philanthropy with community need.

In ten years, assets grew from \$5,000 to \$16.5 million. Grants grow from \$13,950 in 1992 to \$2.16 million in 2002.

2002

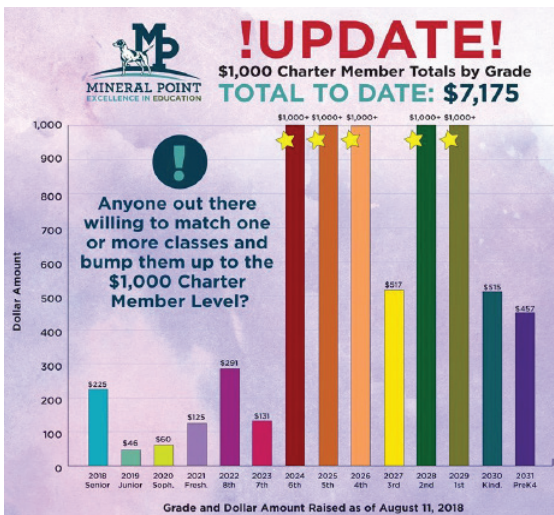
Sue Conley becomes the second executive director of the Community Foundation of Southern Wisconsin.

2002

Championing a Cause Worth Every Penny

Featuring The Mineral Point Excellence in Education Endowment Fund

Students and families in the Mineral Point School District saw the value of a penny grow recently as their Every Penny Counts Campaign raised more than \$7000 for the Mineral Point Excellence in Education Endowment Fund (MPEIE). Initiated during the 2017-2018 academic year by volunteer leaders of the MPEIE advisory board, the campaign proved that small gifts can have big, and meaningful, results.



The challenge was for every #PointerNation class, beginning with the Class of 2018 and extending to the 2017-2018 PK4 class (the Class of 2031) to collect pennies and other coins to reach a goal of \$1000 each. Students learned that the ambitious saving of the small coin typically found on a sidewalk or in couch cushions could be competitive, fun, and most important, a windfall collectively.

In all, the classes of 2024, 2025, 2026, 2028, and 2029 exceeded their mark. And there's confidence in the momentum of the campaign that the 2018-2019 academic year will see another five classes each reach or surpass the \$1000 target.

The Mineral Point Excellence in Education Endowment began in 2016 and awards grants for special projects, programs, and initiatives in the Mineral Point Schools otherwise unfunded by other sources. The inaugural grants, totaling \$1990, were awarded in May of 2018. The projects funded included Opera for the Young, a subscription to Nearpod, an interactive learning platform, and needed supplies to be able to offer yoga and mindfulness for school-aged children.

Want to help the other classes reach their goal? Your gift of pennies and more to the Mineral Point Excellence in Education Endowment can be made at anytime!

Help the other classes hit or exceed their target to become a \$1000 charter member! Give today at www.cfsw.org/givenow

Celebrating Philanthropy

For Sharon Murphy and Brad Niemcek, volunteers in Crawford County, philanthropy means being a good neighbor.

"We've seen so many instances of good neighborliness and often been its beneficiaries," says Sharon. "And we've seen plenty of examples of folks who have gone above and beyond what might be expected, whether it be in physical labor, comfort and spiritual support, donations of goods or funds, or combinations of such things."

Those examples have stirred in the couple the philosophy of "if they can do that, then we can do something, too."

Sharon and Brad have witnessed incredible responses to recent flooding in their Kickapoo River community. They have joined teams of volunteers, helping clean away mud and debris, collecting donations of cleaning supplies, gathering garden produce and other kinds of food and preparing meals. Their enthusiasm is fueled by the adults who have involved young people in these efforts, teaching by example that philanthropy is, and should be, a part of growing up.

Sharon Murphy and Brad Niemcek are known throughout their region for pitching in, whether it's serving on a board (The Crawford County Community Fund, North Crawford Community Education Foundation, Crawford County Farmers Markets Grow, Driftless Development, Driftless Area Art Festival, to name a few) or sharing their talents in communication, organization and business.

"It's good to be involved," says Sharon. "To know that the work or funding we can contribute can help, in some small way, to make things better for individuals and communities."

State of Wisconsin Attorney General's office uses Wisconsin community foundations to disburse funds received from the state's tobacco settlement. CFSW awards \$76,000 to health care projects in our service area.

2002

More than 400 funds have been established.

CFSW is one of nine Wisconsin community foundations to be confirmed in compliance with U.S. Standards for Community Foundations.

2002

Lending a Hand to Historical Importance

Featuring The Platteville Community Fund

Platteville, WI is the largest city in Grant County, Wisconsin. In the mid-1800s, when the area's population was barely 1,000, lead and zinc ore were discovered and mining became the predominant economic activity. One miner, Lorenzo Bevans, struck it rich just a few yards from Platteville's Mining & Rollo Jamison Museums' back door, and in 1845 developed a very industrious lead mine that produced more than two million pounds of lead ore in one year. In 1972, the 1845 Bevans Lead Mine was re-discovered. It was excavated and opened to the public in 1976.

More than two centuries of mining history are commemorated on the grounds of The Mining & Rollo Jamison Museums, giving the nearly 10,000 visitors and 3,000 school-age children who tour annually a deep look into a past worth preserving. The mine teaches valuable lessons in geology and geography, and opens a lens to Platteville's cultural history as well as historic natural resource development.

"The Bevans Mine truly is an example of underground architecture, and one of a very few Wisconsin mines left that people can actually tour," says Museum Director, Erik Flesch. "It also offers an exciting and important look into a part of Platteville's heritage. Many people still know families who have a connection to working in the area mining industry in some capacity as recently as the 1970s, or who studied mining engineering at the UW-P through the 1980s," Eric states.

The 1845 Bevans Lead Mine is one-quarter of a mile long. When visitors enter and exit the mine, they descend and climb a 90-step stairway (called the mine's incline) with the aid of a handrail. In early 2017, staff decided it was time to retire the original handrail, which was showing the effects of 40 years of exposure and wear. It was not just unsightly; its jagged iron edges and flaking rust meant it was also potentially unsafe.

With the help of a \$7,800 grant from Robert and Marian Graham Community Fund, administered by the Platteville Community Fund, the mine now has a rust-free handrail anchored and welded in more than 66 spots to help guide tourists down to what was once a source of richness that made Platteville what it is today.



"Our annual visitors help us to continue our important work in preserving the past," says Erik. "We want to make their visit easy, fun, educational and, of course, safe. The incline's new railing allows us to do that."

Erik Flesch, Director, credits the Platteville Community Fund as a highly respected collaborator in the museum's work.

"PCF has been the most amazing partner in supporting valuable community projects."

The Women's Fund is established

2003

2003

"Big Rudy" Regez passes away. Friends and family make gifts to the Monroe Fund totaling more than \$6,000.

2004

Phil Reuter, a member of the first board of directors, passes away.

Realizing a Dream Come True

Featuring Alan Dunwiddie, Founder and Friend

For 25 years now the Community Foundation of Southern Wisconsin has been matching personal philanthropy with community need. And we have Alan Dunwiddie to thank for being a visionary and humanitarian when it came to developing a place where gifts of all sizes could have a profound positive effect on local people and projects.

As a banker at M&I Bank (now BMO Harris), Alan helped manage the Parker Pen Company's charitable giving through his desk drawer at the bank. When he retired, he realized both local banks and donors could benefit from a foundation that could handle gifts, he jokes, in a more secure and manageable place than his desk. He became the president of the local Janesville Foundation where he quickly learned about community foundations and their purpose. When he heard a story about a local man leaving a sizable gift in his estate that ended up going to a charity's national headquarters in New York, Alan started thinking the community needed a professional organization that would allow gifts to stay local. He gathered five of his friends who each contributed \$1000 and the Community of Foundation was born. The group's goal was to raise one million dollars a year. After 25 years, the Foundation has doubled their goal and now manages more than \$55 million in total assets.

"We've had the support of a lot of people. Some bigger gifts, sure, but many, many small gifts," says Alan. "The real service of the Community Foundation is that those small gifts are pooled to become big gifts, invested and managed very well to have significant impact."

Alan remembers a particular story while at the Janesville Foundation. A man wanted to contribute to a scholarship for local students and would appear every Christmas Eve for many years to make a gift. "I didn't dare leave early," Alan laughs. The man continued stopping there, and one year Alan suggested they transfer the man's funds to the Community Foundation which had larger capacity and advanced investment management that could help the scholarship fund grow. It is now more than \$73,000, a legacy the now-deceased man would be honored to have started.

"I am most proud that I've been part of the Foundation transforming a lot of small gifts into large ones," says Alan. We've been able to do a lot of good. A lot of good that will last forever."

**On behalf of all of us in every
community we serve,
Thank you, Alan.**

The Shullsburg Community Fund is established using the newly developed 'How to Build a Community Fund' manual.

2004

2005

Assets are \$22.3 million.

CFSW holds 14 Excellence in Education Funds.

2005

Creating Meaningful Legacies



Lucy Walkup received a number of honors over the years including Woman of the Year at NAU in 1961 and the Platt Cline Award for Humanitarian Service in 2016 from Arizona Daily Sun Citizens of the Year.

Lucy Walkup, formerly of Benton, WI

The January 16, 2018 Arizona Sun Times newspaper began an article with the sentence, *A Flagstaff institution has passed away.* Lucy Meloy Walkup died that Monday at the age of 101. But as much as she was seen as a Flagstaff Institution, the gift she left to her hometown, Benton, WI, makes her a legend here, too — a generous bequest from her estate to the Benton Community Fund is testament that she still cared deeply about her birthplace.

She earned her BA in Secondary Education from Rosary College in River Forest, Illinois. She was subsequently hired by J. Lawrence Walkup, teacher, principal and superintendent, to teach in Sheridan, Missouri.

On June 2, 1943, Lucy and J. Lawrence Walkup married. The Walkups moved to Flagstaff, Arizona, in 1948, when Lawrence Walkup accepted the position of assistant professor of education and psychology at Arizona State College (ASC). Formerly a music and elementary school teacher, Lucy was a substitute teacher at the ASC Training School and later taught sophomore English at Flagstaff High School while Dr. Walkup served as professor, Dean of Education and ultimately President of ASC. Lucy earned her MA in Secondary Education from ASC in 1958.

Lucy became immersed in campus life, serving in this role for 22 years. After Lawrence's death in 2002, Lucy donated her time to the American Cancer Society, the Symphony Guild, the NAU Faculty Wives Club and as a volunteer at DeMiguel Elementary School, where she helped second- and third-grade students with their reading skills until "retiring" at age 98.

The Benton Community Fund was started in 2010 when a group of committed volunteer advisory board members reached a fundraising goal of \$50,000 in just 51 days. Lucy's gift to the fund will allow it to continue to support and strengthen the community forever.

Shakespeare! By Kids! For Kids! Gets Applause and Support from the Monroe Fund

Shakespeare on the Edge, Inc. is a Monroe based non-profit serving youth throughout Green County that brings arts programming to rural youth to help develop character, self-esteem, confidence, peer bonds, and combat bullying. This year, the Monroe Fund awarded a grant to support added technology in the form of hands-free headsets. Now that's something to clap about!

FUN FOR ALL AT WINSKILL ELEMENTARY SCHOOL

Lancaster Community Schools celebrated the addition of inclusive playground equipment this fall at Winskill Elementary School with help from the Charles "Sonny" Tiedemann Charitable Fund of the Lancaster Community Fund. "When the Community Fund awarded us the grant I am pretty sure I cried," says second grade teacher, Melissa Sperle. "Everybody believed it was something not just our school, but our community, needed. It really was the effort of a whole community that made it happen."

2005

CFSW, along with 20 other certified Wisconsin community foundations, commissions a study on the inter-generational transfer of wealth.

Marty Kennedy, one of our founders, passes away. His wife, Mary, establishes the Martin J. Kennedy, Jr. Scholarship Fund.

2005

2005

Al Diotte, one of our founders, passes suddenly in December. The Alfred P. Diotte Education Fund is established by his family.

2006

CFSW holds more than 475 funds.

Inspiring Others to Give Back



Robb Paquette

*Former Shullsburg Fund
Advisory Board Member*

The Shullsburg Community Fund salutes Robb Paquette for his gifts of time and dedication to the the Fund and to the community. Rob served on the fund's advisory board for eight years, with six as its chairperson.

Because of its growth, the Fund has had major impact on local community projects: for example, the creation of the basketball court in the park and the new swimming pool sitting area, to name a few of many projects the fund has supported.

"Shullsburg is my hometown and I care very much for it. I love to see it thrive and continue to get better. There's so much pride and generosity here from both current and past residents. Shullsburg is very unique that way," says Robb proudly.

How an IRA Changes Charitable Giving

Louise Brockman

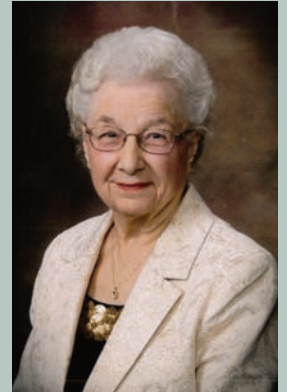
Donor/Former Platteville Community Fund Advisory Board Member

When it comes to the subject of charitable giving, Louise Brockman doesn't hesitate to share with others just how easy it is to make a difference with a gift of any size, particularly through your Individual Retirement Account. Having an IRA of her own, Louise became familiar with the latest tax ruling that owners of IRAs who are at least age 70½ can contribute some or all of their IRAs to charity. And anyone with a traditional IRA, must begin taking required minimum distributions (RMDs) at age 70½ even if they neither need nor want the money at that time. A qualified charitable distribution (QCD) lets you transfer those distributions directly to an eligible charity so you're not taxed on it. QCDs count toward your required minimum distribution for the year. And as Louise states, doing so has dual purpose: you avoid having to pay income taxes on the distribution and you give a gift to organizations in need.

"I took part of mine and set up a scholarship, gave some to my church, and used some for income," explains Louise. "Giving can be done is so many ways but this is very easy. All I had to do was contact my policy holder and tell them where I wanted my gift to go. And you don't miss it because you haven't really had use of it anyway."

Louise's passion for giving back comes from her belief that no one got to this point in life without the help of others. "We've been the recipients of past giving and have benefitted from others' generosity. We need to do the same," says Louise. "Plus it gives you so much joy in return."

To give a gift through your IRA, please consult with your tax professional for the most up-to-date information.



Scholarship Recipient Sends Moving Letter of Thanks, An Excerpt, by Karleen Wojczak

"As a 2013 graduating senior at Parker High School (Janesville), I applied for and received a scholarship and shared with you my dream of becoming a Physician Assistant. I am happy to report, I did it! I went to Marquette University and received a Bachelor of Science in Biomedical Sciences and a Masters of Physician Assistant Studies. I am so excited to start my career! Five years ago, you believed in me and invested in my future. I am proud of my accomplishments throughout my time at Marquette and am eager to start my next adventure of working in an area that will challenge me every day and continue pushing me to do better for my patients. Thank you for putting my dream within reach!"

A nod to the Theodore W. Batterman Family Foundation Scholarship, the Janesville Woman's Club Association Scholarship and the Youth Baseball of Janesville Scholarship.

Crawford County is now
being served by CFSW.

2007

The mission statement is updated to
"We match personal philanthropy with
community need."

2007

The Elkhorn Community Fund is
established with a \$100,000 challenge
match from Peoples Bank.

2007

The Blanchardville/Hollandale Area
Fund is established.

2007

Believing You Can Be a Philanthropist

When individuals hear the words *Estate*, *Philanthropy*, and *Legacy* they often think of Bill Gates, Warren Buffet, Oprah Winfrey, or those Lifetime® stories where the perfect couple inherits a stately southern mansion and wealth from an estranged relative. But it doesn't take a fortune to be charitable. Philanthropy at the Community Foundation of Southern Wisconsin is a habit of the heart that allows us to prepare for the needs of tomorrow through endowment-building today. Gifts, big or small, can help make the world a better place.

We understand that your top priorities in life are to take care of your family and loved ones, but what if you made a gift of 5% of your estate to help address the future needs of your community, your high school, that nonprofit that helped you get back on your feet when times were hard, or

even for your church to assist in the future building of that community hall. Leaving behind 5% doesn't sound like a lot, but imagine how that 5% will grow over the next 100 years with strategic and practical fund management by the Foundation. We are here to assist you in creating your legacy, developing your style of philanthropy, and addressing questions you might have about your estate planning in the hopes creating a deep impact on the lives, communities and world for generations to come.

The Community Foundation enhances the lives of people across Wisconsin and improves the economies of the communities we serve. Through your own personalized act of philanthropy no matter the size of it, the Foundation will carry on your legacy and wishes **for good, for ever®**.

Giving with Goals in Mind

At the Community Foundation of Southern Wisconsin, we know that giving to any charitable cause is a very personal choice that involves thoughtful and meaningful decision making. Regardless of the amount, we are confident we can help you tailor your giving plan to where you are in your life, your personality, and to best reflect your vision and values. The first step is simply considering your answers to a few questions:

- What motivates you to give? (Your spiritual beliefs, or a desire/passion to help others, fear or hope, etc.)*
- What values have your family and other role models passed on to you that are important for you to carry on?*
- What experiences have shaped your beliefs/your thinking?*
- Where have you spent your time and money in the past?*
- How do you prefer to make gifts? One gift to one organization or several to many?*
- Do you prefer Spendable Gifts or Endowments?*

Spendable gifts are given to be entirely spent out immediately or over a short time. Endowments are restricted funds that are invested in perpetuity, with annual distribution amounts available to spend. Both support activities consistent with donor intent.

- What funds listed on page 17 interest you?*
- Did you know there are certain tax benefits to giving to charity that would allow you to give to charity AND take care of your family?*

Ready to learn more? We are happy to meet with you and your family any time to share how a fund with the Community Foundation could fit in with your goals for giving back.

Contact your regional donor services representative, page 17, visit www.cfsw.org or call us at (608) 758-0883.

2008

CFSW moves to 26 South Jackson Street in August. The Crawford County Community Fund is established.

2009

An anonymous donor offers a challenge to communities with farmers markets and contributes \$1 for every \$2 raised up to \$2,500 per community in our region to provide coupons for food pantry clients to redeem at their local markets.

The Benton Community Fund is established.

2010

With the addition of the Wisconsin Dells area and Vernon county, CFSW now serves communities in nine southern Wisconsin counties.

2011

Donor Services Staff



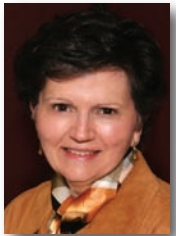
Rock-Walworth Counties

Jane Maldonis

Donor Services Rep

Contact: jane@cfsw.org

(608) 758-0883



Southwest Wisconsin Communities

Barb Daus

Donor Services Rep

Contact: barb@cfsw.org

(608) 778-3344



Green-Lafayette-SE Iowa Counties

Linda Gebhardt

Donor Services Rep

Contact: linda@cfsw.org

(608) 328-4060

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 Allow donors the right during their lifetime, or during the lifetime of other advisors named, to recommend grants to specific agencies and institutions or to the 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 Allow nonprofit organizations to establish endowments with the Community Foundation to support their future operations.

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

Types of Gifts

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. 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 typically between 4% and 6% of its average market value over the 12 trailing quarters.

More than 530 funds are currently providing grants and scholarships. Assets total \$30.3 million.

2012

Assets go from \$35M in 2013 to \$43M.

2013

The Friends of Pleasant View and The Team Mathias funds are established.

2013

Statements of Financial Activities

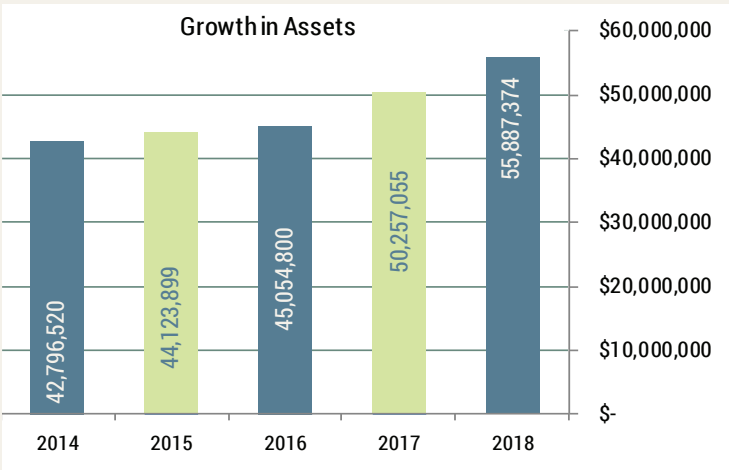
Years ending June 30, 2018 and 2017

Revenues and Gains	2018*	2017**
Contributions	6,873,674	4,935,618
Investment and other revenue	3,718,529	4,975,033
TOTAL REVENUE	\$10,592,203	\$9,910,651

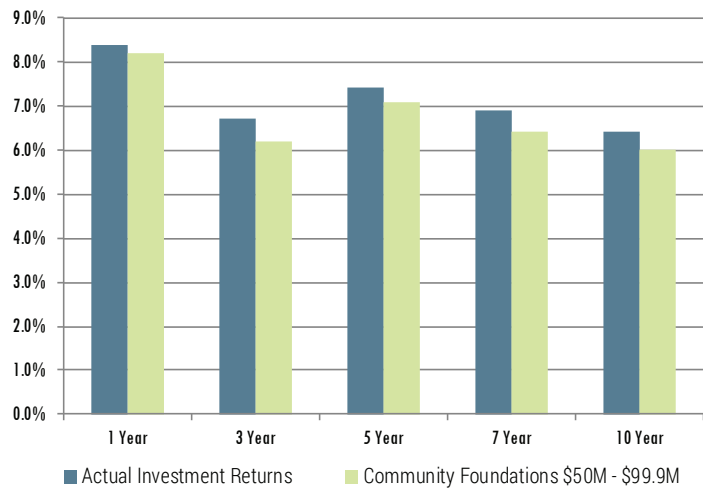
Expenses and Grants	2018	2017
Program expenses and grants	4,428,437	4,549,003
Management and general	507,228	433,468
Fundraising	43,748	59,332
TOTAL EXPENSES AND GRANTS	\$4,979,413	\$5,041,803

Change in Net Assets	2018	2017
Change in Net Assets	5,612,790	4,868,848
Net Assets, beginning of year	45,206,216	40,337,368
NET ASSETS, END OF YEAR	\$50,819,006	\$45,206,216

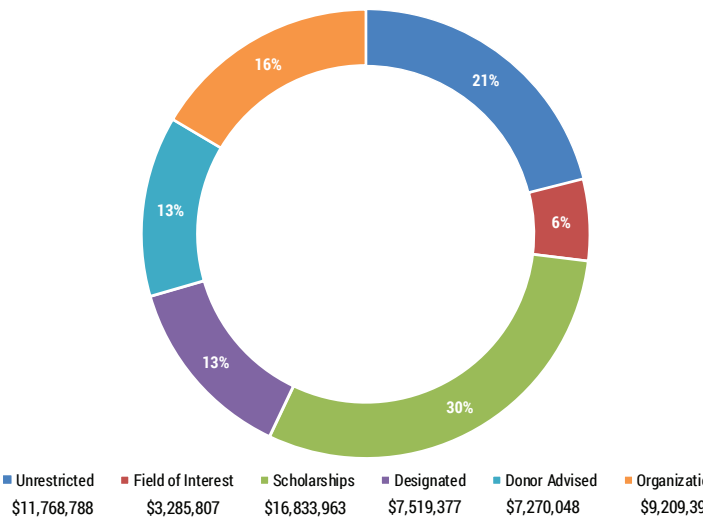
Total assets - liabilities = net assets *Subject to audit **Restated per audit



Investment Performance



Assets by Fund Type



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 include:

- BMO Harris
- First National Bank & Trust-Beloit
- Johnson Bank
- Union Bank & Trust
- US Bank
- Wisconsin Bank & Trust.

The Belmont Excellence In Education Endowment Fund is established.

2013

Executive Director, Sue Conley retires after 13 years with CFSW. Ann Heiden is hired.

2014

The Janesville Education Foundation of the Janesville School District merges with CFSW's Janesville Excellence in Education (EIE) Fund.

2014

The Platteville Scholarship Endowment Fund reaches 24 named funds. CFSW now manages 14 EIE funds and 18 Community Funds.

2015

The Mineral Point Schools Excellence in Education Endowment and the North Crawford Community Education Foundation Endowment Funds are established.

2016

Leading with Passion and Pride

Featuring The Community Foudnation of Southern Wisconsin Board of Directors



Ken Klaas
Chair
Grant County
Field Service Manager
TDS Telecom



Jennifer Revels
Vice Chair
Rock County
Owner
Revels Consulting, LLC



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



Jim Cripe
Secretary
Rock County
Attorney
Nowlan & Mouat



Kelly Bauer
Sauk County
Senior VP
Bank of WI Dells



Laura Carney
Rock County
Nurse Practitioner
Whitewater Family
Practice



Cindy Tang
Grant County
Consultant



Fred Koster
Green County
CPA
Reffue, Pas, Jacobson,
Knox, & Koster, LLP



Carol Hatch
Rock County
Attorney
Nowlan & Mouat



Curt Bisarek
Vernon County
Superintendent
School District of
Hillsboro



Dan Winter
Rock County
Planning and Wealth
Management Director
LifeCircle



Erin Ogden
Iowa County
Attorney
OgdenGlazer, LLC

Founding and former board members

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Bobbie Bernet
George Brunner
Robert Collinst
John Condon†

James Cripe*

Barbara Daus
David Deininger

Alfred Diotte*†

Jane Dunk
DeEtte Beilfuss Eagert†
Jim Finley
Gregory Galvan
Patricia Graham
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Melita Grunow
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Rhonda L. Hartwig
Linda Heckert
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John Henderson
Margaret Hollenberger
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Marshall Johnston*†

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Janice Schmidt
Steve Sheiffer
Frank Scott
Elizabeth Siegert

Gary L. Smith*

Lois Smith
Ron Spielman
James Stauff†
George K. Steil, Sr.†

John Steil*

Lisa Stevens
Donald Templin
Cere Turner
Julie Wilke

† deceased

*** Founding Board Member**

Interested in becoming involved with your local coomunity fund, excellence in education fund, or with the Community Foundation of Southern Wisconsin? Call us today to find out how!

The Mineral Point Community Fund is established.

2016

The total reinvestment into our communities since our establishment reaches more than \$45 million given back in grants in scholarships!

2017

Assets reach \$50 Million.

2017





Special thanks to Wegner CPAs for
sponsoring this report.



In Janesville | (608)758-0883 or toll-free (800) 995-2379
26 S. Jackson St., Janesville, WI 53548

Wyatt Jackson President/CEO wyatt@cfsw.org
Mary Wileman Chief Financial Officer mary@cfsw.org
Jane Maldonis Donor Services Representative jane@cfsw.org
Jackie Ommott Grant and Scholarship Manager jackie@cfsw.org
Lannie Troon Gift & Grant Manager lannie@cfsw.org
Allison Hokinson Communications Director allison@cfsw.org

In Monroe | (608) 328-4060
Wisconsin Bank & Trust, 2nd floor,
1717 10th St., P.O. Box 733, Monroe, WI 53566

Linda Gebhardt Donor Services Representative linda@cfsw.org
Kristine O'Connor Administrative Assistant kristine@cfsw.org

In Platteville | (608) 778-3344
Wisconsin Bank & Trust, 2nd floor,
10 Keystone Pkwy., P.O. Box 81, Platteville, WI 53818

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Andy Custer Administrative Assistant andy@cfsw.org

