

*It's about family.*



Staying strong, sticking together, and caring for others.



COMMUNITY  
FOUNDATION  
OF SOUTHERN WISCONSIN  
Annual Report 2019-2020

## COMMUNITIES, LIKE FAMILIES, COME TOGETHER DURING CRISIS



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### MISSION

Matching personal philanthropy  
with community need.

We will be there.  
For Good. For Ever.



This past year, the COVID-19 pandemic has impacted families, workplaces and communities everywhere. In comparison to other disasters, this one has affected all of us universally, making the phrase “in this together” even more significant.

To all of us here at the Community Foundation of Southern Wisconsin our communities are like our families: ones we want to take care of, nurture, and strengthen in good times and during stressful ones.

Despite this challenging time in our history, your generosity and compassion for our communities continue to bring hope in what we can accomplish together. The Community Foundation and all our funds are a testament to every community’s efforts to safeguard assets for the next generation—funds that address today’s and tomorrow’s critical needs.

Our purpose is to help our communities respond to problems with effective long-lasting solutions so needs are met whenever they arise.

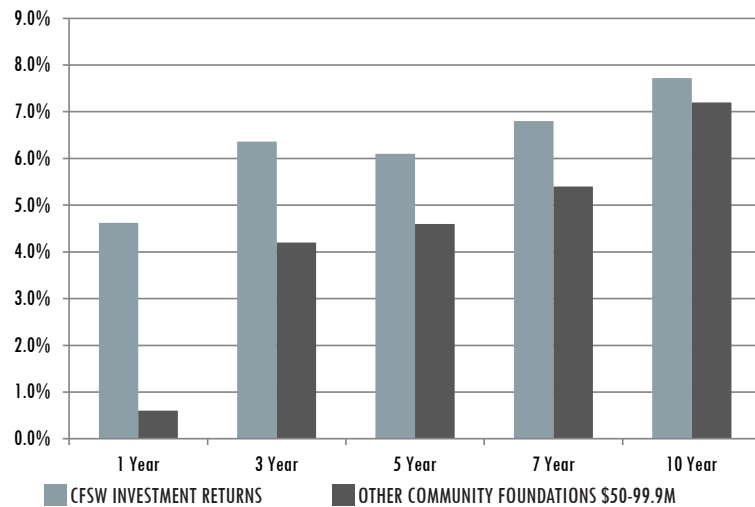
This year, we’ve enclosed a gift envelope in this report. As you plan your charitable giving, please consider a gift to your community through the Community Foundation of Southern Wisconsin. It’s the perfect way to say you care, to say thank you to the organizations that enhance everyone’s quality of life, and to help your friends, family, and neighbors enjoy plentiful carefree days ahead.

From our family to yours, we wish you the greatest health and warm wishes. If we learned anything this past year, we know now, more than ever before, we’re all better and stronger together. We can’t thank you enough for your support and for being a part of our community family.

A handwritten signature in blue ink, appearing to read 'Wyatt Jackson'.

Wyatt D. Jackson, President/CEO

## INVESTMENT PERFORMANCE FYE JUNE 2020



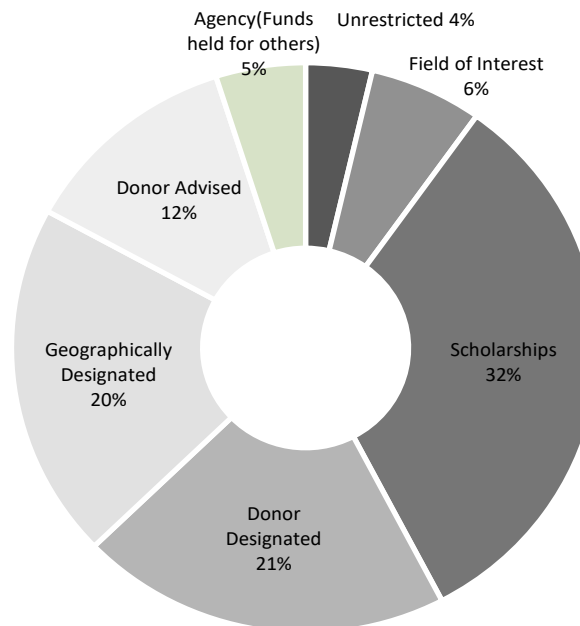
## 2019-2020 IMPACT

### BY NUMBERS

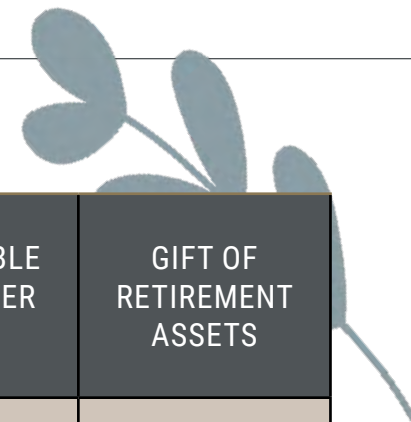
TOTAL FUNDS	722
NUMBER OF GIFTS	4,831
GRANTS AWARDED	777
SCHOLARSHIPS AWARDED	568

### BY THE FIGURES

TOTAL ASSETS	\$61,533,009
TOTAL IN GRANTS	\$3,105,263
TOTAL IN SCHOLARSHIPS	\$726,926
TOTAL GRANTS/ SCHOLARSHIPS	\$3,832,189



# YOUR GIFT YOUR WAY



YOUR GIFT	CASH GIFTS	STOCKS & SECURITIES	BEQUEST	GIFT OF LIFE INSURANCE	CHARITABLE REMAINDER TRUST	GIFT OF RETIREMENT ASSETS
YOUR GOAL	Make a quick and easy gift.	Eliminate tax on long-term capital gains.	Defer a gift until after your lifetime.	Make a large gift with little to no cost to yourself.	Secure a fixed and often increased income.	Avoid taxation on long-term capital gains.
HOW TO MAKE A GIFT	Simply visit <a href="http://www.cfsw.org">www.cfsw.org</a> and choose Give Now or mail in a check.	Contribute long-term appreciated stock or other securities.	Name CFSW or your local community fund in your will or living trust. Designate a specific amount, percentage or a share of the residual.	Change ownership on a life insurance policy you no longer need.	Create a trust that pays income annually; the principle is retained for a qualified charitable organization like CFSW or one of our funds.	Name us as the beneficiary of your retirement account after your lifetime. Take advantage of Required Minimum Distributions on IRAs through a gift to CFSW or your community fund.
THE BENEFITS YOU RECEIVE	Income tax deduction. Personal gratification in giving immediately to your community.	Immediate charitable deduction. Avoidance of capital gains tax.	Control of your assets for your lifetime. Donation exempt from federal estate tax.	Current income tax deduction.	Variable or fixed income for life. Immediate income tax charitable deduction.	Allows you to make a gift from the most highly taxed assets. Meets requirements for RMD.

Many of these gifts, based on a qualified minimum (see page 5), allow you to create a Named Fund to honor your family or someone else you love and admire, leaving a beautiful legacy. We'd be happy to talk with you more about that at any time! As always, we suggest you speak to your financial professional for tax and estate advice.

# FUND CHOICES MAKE IT EASIER TO GIVE



FUND TYPE	ESTABLISHING A FUND SUGGESTED BALANCE
Donor Advised	\$15,000
Scholarship	\$25,000
Field of Interest	\$10,000
Community Fund	\$50,000
Agency Fund/Organization Fund/Nonexempt Fund/Named Community Fund	\$10,000
Spendable Fund	\$1,000 minimum balance

**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 appointed successors, 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, and a donor the legacy of support to their favorite charities.

**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.

**Agency Endowments** Allow nonprofit agencies to establish endowments with the Foundation to support their future operations.

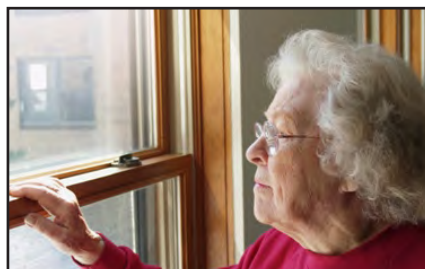
**Field of Interest Funds** Allow donors to target gifts to address needs in an important area of community life such as at-risk youth, the elderly, or the arts, while allowing the Community Foundation to make grants to support programs and projects within their chosen field.

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



# GRANTS GUIDE COMMUNITIES THROUGH CHALLENGES

As Community Funds grow with gifts, their granting impact increases.



**The COVID-19 Pandemic** has, without a doubt, brought with it anxiety, fear, and uncertainty, but it has also brought hope, compassion and community collaboration. As challenging as it's been, it reminds us of the importance of looking out for others: family, friends, neighbors. As an extension of acts of kindness, Compeer Financial partnered with the Community Foundation of Southern Wisconsin back in April to help support essential services and critical community needs during this challenging time.

Through a generous donation from Compeer, the Community Foundation of Southern Wisconsin was able to offer each of its Community Funds the opportunity to apply for a grant for up to \$1,100 to help local organizations respond to COVID-19 relief efforts. This one-time grant helped our Community Funds meet the local needs of qualified, local nonprofit organizations, city/government agencies, or schools that addressed food and housing insecurity, transportation needs, childcare programs, and other relief efforts, during the pandemic.

The current pandemic shows us that each of us, at various times, depends on the strength and resilience of our community, it also encourages us to give passionately to keep that strength going for generations to come. The Community Foundation of Southern Wisconsin is grateful for the opportunity to help... **for good and forever.**

Argyle Community Fund .....	Ole's Cupboard
Benton Community Fund .....	Benton Public Schools Food Insecurity Program
Blanchardville/Hollandale Area Fund .....	Pecatonica Area School District
Crawford County Community Fund .....	FFA-Pick-a-Pack Program
	National Honor Society – Backpack Program
Darlington Community Fund .....	Food Pantry of First Baptist Church of Darlington
Edgerton Community Fund .....	Edgerton Community Outreach Inc.
Elkhorn Fund .....	Walworth County Food Pantry
	Elkhorn Food Pantry
Evansville Fund .....	Community Action-AWARE Evansville
Janesville Generations Fund .....	ECHO Food Pantry
Lancaster Community Fund.....	Lancaster Food Pantry
Milton Community Fund .....	Milton Food Pantry
Mineral Point Community Fund.....	Mineral Point Rescue Squad, PPE necessities
Monroe Fund.....	United Way of Green County COVID-19 Relief Fund
New Glarus Community Fund .....	Caring for Kids Back Pack Buddy Program
Platteville Community Fund.....	Senior Nutrition and Food Pantry Voucher Program
Shullsburg Fund.....	Shullsburg School District Lunch program
	Shullsburg Food Pantry
South Wayne Community Fund .....	Black Hawk Food Pantry





# STOCK GIFTS MAKE IT EASY TO BE CHARITABLE

A gift of stock or securities helps donors avoid long-term capital gains tax.

**Kris Koeffler, Milton, WI**, has worked one full-time job and one part-time job her "whole life." As she earned a living, she grew her giving spirit along with it. Giving back is something that, she says, has always been important to her having grown up in a small town with parents who instilled getting involved locally for the "greater good."

For Kris, there are two kinds of gifts: a push and a drip. The push is a gift that helps push a project of a non-profit to completion. The drip is an on-going gift made recurringly. Both types of gifts, she says, are effective, meaningful, and needed.

Kris began giving through the Community Foundation of Southern Wisconsin 15 years ago. "Because the Community Foundation has wise investment strategies, it grows my gift," explains Kris. "I put money in. It grows. I have more money to give away. That's how it works. I make several gifts yearly. It's that easy!"

Kris's giving strategy of choice has been stocks. "I bought 100 shares of a stock five years ago at \$25 per share or a \$2,500 investment. That stock grew to be worth \$400 a share – My initial \$2,500 had grown to \$40,000!" says Kris.

She explains that, in September 2020, the stock was split: four shares for every one share she owned which today gives her 400 shares at \$100 per share. If she cashed in the stock now her cost per share is only \$6.25. Put another way, that's about \$94 on every \$100 of capital gains.

"A smart move for me is to donate 100 shares of stock to a Donor Advised Fund at the Foundation. Now I have a tax donation of \$10,000 and it cost me about \$500, and I still have \$30,000. How cool is that!?"

Kris's stock donation qualifies as a tax-deductible charitable donation to the Community Foundation which, through any interest on the investment, will allow Kris to decide when and how to reinvest it back into the community, and for that, she does her homework.

"I give locally and annually to organizations I know are doing important work in our community. I usually have some personal connection with the agency: I know someone they helped, or have seen the director in action. I talk with the administrator and ask how can a gift from me help?" Kris explains. "I first plan my giving with the good people at the Community Foundation before I tell the nonprofit I'm giving. Then I put the "push and drip" into action: I give a certain amount to a local organization each year AND make a commitment across three years. These people are doing such incredibly meaningful and much-needed community work that it's an honor to support them."

Kris encourages others to be charitable through the Community Foundation as an easy way to give back to the community and pay it forward.

"If you're not a giver yet you need to get on board and be one – in any amount and through a number of ways! It's very easy, it's fun and it's really good for the soul."



*"I'm not rich.  
I'm not special.  
I just believe in doing my part."*

—Kris Koeffler  
Donor Advised Fund

# SPECIAL EVENTS RAISE AWARENESS AND GIFTS

Sponsoring, attending and donating to a fundraising event helps support your local community's causes.



Jeanette Jones (L) and Nancy Nelson (R) cheer on raffle ticket buyers.



Outgoing, long-term advisory board member, Carolyn Butts, greets guests.



(L-R) Advisory board members gear up for the big event. Christia Hunt, Jeanette Jones, Simone Jeans, Mary Anne Alt, Doug Zblewski.

**Back in 2005 when Nancy Nelson** was brainstorming fundraising ideas she went straight to one of her favorite things: chocolate, and suggested the group plan an event around that rich, tasty theme. Nearly 16 years later, The Evansville Fund's Chocolate Extravaganza is the fund's only fundraiser that has brought in more than \$84,000 since its start.

Event guests enjoy a wide array of chocolates made by some of Evansville's premiere chefs. Guests are treated to a glass of wine, access to all the chocolate samples, a silent auction and raffle, and live music.

To many, the highlight of the evening is the Chocolate Turtle sale. One hundred boxes are packed with two handmade chocolate turtles. Guests can purchase one or several boxes for \$5 each. Hidden in several boxes is cash for a fun game of chance.

"The Chocolate Extravaganza idea was an event I could really get my heart, or should I

say taste buds, into because I love chocolate," Nancy remembers." But what is most important is that it raises money to allow additional grant opportunities for critical local organizations and gives the Fund visibility in the community as a supporter of those organizations."

Though her love of chocolate helped start a popular fundraiser, her love of community has kept her active in the Fund's operations. Nancy has served on the Evansville Fund Advisory Board for four non-consecutive three-year terms and will start her fifth term in January.

"I love encouraging people to get involved in supporting the fund through board membership and by establishing family funds, says Nancy. "I am a life-long resident of Evansville and a great cheerleader for our community. As the Fund grows, we can continue to have a significant impact on our schools, the arts, our historical significance and the quality of life in our city."





# PASSION FOR HISTORY FUELS A FUND'S GRANT FOR RESTORATION

Gifts in any amount to local funds help preserve pieces of important history.

**Since 1955, the Chalet** of the Golden Fleece Museum has been a popular New Glarus, WI tourist destination. Once the private home of Edwin Barlow (1885-1957) – the founder of the New Glarus Wilhelm Tell play – this authentic recreation of a Swiss Bernese mountain chalet contains treasures that Barlow collected for more than 30 years. The Chalet is one of only two authentic Swiss Chalets in New Glarus and one of just six in the entire state.

Throughout the decades, the museum faced challenges of funding, staffing and operations that threatened its existence as a museum. But the love of the Chalet and its rich history remained in the hearts and heads of a group of local people committed to keeping the museum doors open. The Friends of the Chalet of the Golden Fleece Group eventually succeeded in 2013 in partnering with the Village Board to get the Chalet on the National and State Registers of Historical Places.

This past year, the Chalet received a grant from the New Glarus Community Foundation to restore a painting of Edwin Barlow wearing his

World War One Army uniform. The portrait was originally given to the Village of New Glarus as a gift from Edwin, and ended up being shuffled in locations, eventually becoming “lost.” While volunteers were helping a consultant hired by the Village of New Glarus complete an inventory of its collection, they discovered a hidden closet in the basement where they found the historical portrait.

“The restoration has resulted in a portrait that looks as fresh as when it was first painted,” says Sandy Blum, President of the Friends Group. “We are so grateful for the support in preserving this important piece of history.”

Sandy says the group has accomplished many goals this past year, including installing a new front porch, restoring additional art pieces, raising revenue for better sustainability, increasing Friends memberships, securing additional grants and more.

“We are very proud of our accomplishments and thank the New Glarus Community Foundation for playing a big role not only in our success but in preserving our past.”





# STICKING TOGETHER TO STRENGTHEN OUR COMMUNITIES



Crawford County Community Fund awarded more than \$6,500 in local grants during their Fall 2019 grant award presentation.



The Women's History Mural in Janesville (showing just a portion here) was created in 2010 to celebrate Women's Equality Day. CFSW's Women's Fund exceeded its goal to fix and preserve this important piece of Janesville history!



With the help of the Argyle Community Fund, the Argyle Public Library received an added measure of safety from newly installed plexiglass partitions.



Shullsburg Community Fund "Decked the Shelves" with books for the holiday season.



South Wayne Community Fund supported the Warrior Pack Program -- a program that provides children with nutritious, easy to prepare food during times of need.



The Darlington Community Fund helped source 16,000 masks for the community early on in the pandemic.

# RESPONDING TO NEEDS THROUGHOUT SOUTHERN WISCONSIN



First National Bank & Trust awarded a \$1,000 grant to the Argyle Community Fund as part of the Federal Home Loan Bank COVID-19 Relief Program. This grant supported organizations throughout Argyle impacted by the pandemic.



This beautiful Main Street Mural got a boost from the Blanchardville/Hollandale Community Fund.



Grant Regional Health Center realized that OB units and labor and delivery rooms of old are no longer supporting today's modern approaches to the birth experience. They set out to fix that in two ways that will allow them to enhance patient care, strengthen family support and improve a family's desire for that feel-at-home comfort: update their space and upgrade equipment. With help from the Lancaster Community Fund, they were able to start on both earlier than expected.

Rooms will soon receive significant improvements in cosmetics and furnishings (new birthing beds, sleeper sofas, bassinets, rockers, and much more) and cutting-edge medical technology, including the recent addition of the Novii fetal heart monitor—a wireless system that monitors fetal heart rate, maternal heart rate and uterine activity, all with a single patch. The new monitor allows for enhanced patient comfort, greater mobility, and increased reliability than other monitors.

"If we had not received the \$8,000 for the Novii wireless fetal heart monitor and/or the \$100,000 grant for the renovation project that will fund our triage room, we would be struggling much more to reach our goal at this time," says Brandi Riechers, Foundation Coordinator at GRHC. "The addition of the \$108,000 in grant funding from the Lancaster Community Fund took our campaign to another level. It also allowed us to obtain additional funding," Brandi explains.

Brandi is proud of and thankful for the fact that the entire project has been entirely funded through community support (organizations, businesses and individual donors).

"This renovation and new equipment is happening because of many generous, supportive donors like the Lancaster Community Fund! We are so grateful."



# CASH GIFTS TO A FUND CAN CHANGE LIVES

The Foundation manages funds that support a variety of local charitable causes.



## Monroe Woman's Club Christmas Stocking Project

510 food boxes prepared for 329 families and 35 seniors

261 cheer boxes and 190 care packages went to nursing homes, care facilities, memory care homes, and shut-ins

369 families were helped including 836 children (0-18 years old)

60+ businesses, organizations and schools collected toys to donate

250 volunteer shoppers shopped for families in need



**For many, the holidays resemble a Hallmark movie.** But for others it's another day without shelter, warm clothing, or food. In the late 1940s, a Monroe Public School nurse and a public welfare worker identified a need to help families during the Christmas season. When the need appeared much larger than expected, Kathryn Etter, the school nurse and Monroe Woman's Club member, asked the club to take it on. First called the "Department of Public Welfare" in 1947, the project became the "Monroe Woman's Club Christmas Stocking Project" just four years later — a project the Monroe Fund proudly supports.

With a list of families that could use a little extra help during the holidays, Christmas Stocking volunteers call families and find out their basic needs (food, clothing) and some wish items (toys, games) that children, infant thru 5th grade, may want. Both money and toys are donated by individuals, local businesses, and grants from the Monroe Fund. Once needs are determined, a shopper is given an amount to spend per child and delivers these much-needed and deeply appreciated gifts to the family.

Karen Mau-Boll was just six years old when Ms. Etter's kind heart and keen eye for helping children and families in need impacted Karen's life. Karen remembers the exact moment she received a memorable and unexpected gift from the Christmas Stocking Program. That was in the 1950s.

"My mom was a single mom. She could barely make rent working as a house cleaner earning just \$1.00 per hour," remembers Karen. "I remember opening a box that was delivered that had food and a beautiful purple calico toy horse just for me. It was the best present I got, and it just showed us that people cared. It meant so much to us."

Karen says the gesture was so meaningful she still remembers it fondly at the age of 73. She warmly recalls that no one judged or bullied her about being in need, and the Program was, and remains, very discreet about their gifts and their delivery.

"What we got was life-sustaining. It was amazing," she says. "It made it better for both my mom and for me — really a wonderful gift that I'll always remember."



# COMMUNITY FUND BRINGS COMMUNITY TOGETHER

Funds at the Community Foundation are designed to respond to emerging needs.



**A community park** is more than just a place to play. Community playgrounds give children the opportunity to practice and hone key skills including social, emotional, cognitive and physical. They're a place where kids make new friends. A place for parents to bond with children. They are even proven to increase local economies. In other words, parks and playgrounds are an essential part of building communities.

It's something Benton, WI knows well.

The Rolling Oaks Development contains two subdivisions that were developed by the Village of Benton. The first subdivision, Rolling Oaks, was developed in the mid-1990s and now contains 24 single-family homes. In 2018 the Village of Benton developed Rolling Oaks Heights with an additional 24 residential lots. As of today, 12 of the lots have been sold and more new homes are under construction.

As both subdivisions began to fill up, the need for a nearby park became clear. The closest one was a good distance from

the new development and residents would either need to drive there or walk along a busy state highway with no sidewalks.

That's when the Benton Community Fund stepped in to approve an \$11,300 grant to the Village of Benton for the creation of The Rolling Oaks Park.

"We are committed to providing safe, outdoor recreational space for all kids in the community and their families," says Jill Knight, chair of the Benton Community Fund.

"From an economic development standpoint, it's also a great selling point for the remaining residential lots that are available for sale in the subdivision."

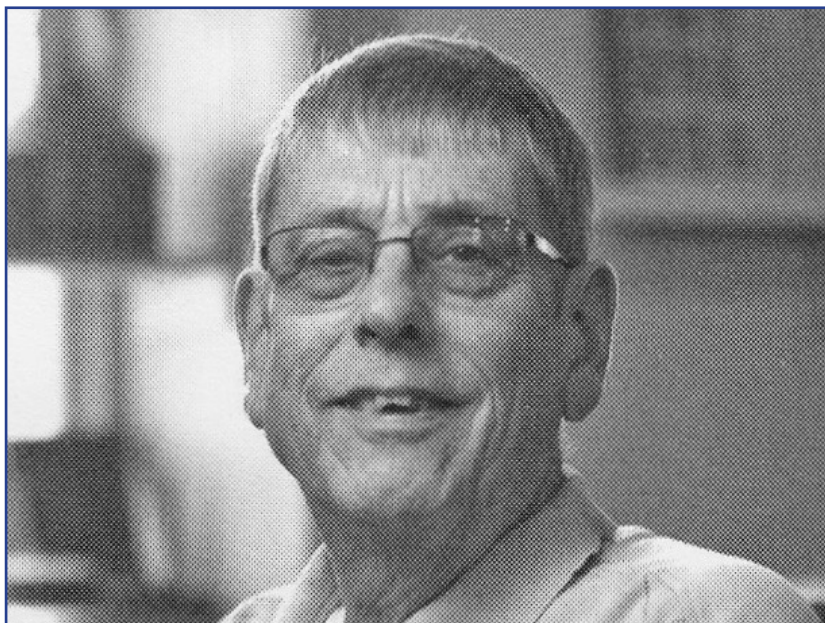
The grant to the Rolling Oaks Park Development was the Benton Community Fund's largest grant ever awarded in its ten years of grant-making.

Now that's a big accomplishment for a small community!

Photo: Jill Knight's granddaughters and great nephew take advantage of beautiful fall weather and all the fun features at the new Rolling Oaks Park, funded in part by the Benton Community Fund.

# DONOR INSPIRED BY FAMILY TO START TWO NEW FUNDS

Establishing a charitable fund and a scholarship fund are two ways a gift lasts forever.



**Meet Matthew Figi.** Of course, if you live in Monroe, WI chances are you already know him through his life-long dedication to local historical preservation that started when he was a young boy, and now will continue beyond his lifetime as a result of establishing a charitable fund and scholarship. He credits his parents for his love of history, and how they made sure to visit older relatives going as far back as his great-grandfather's sisters.

"I remember going to a family gathering when I was about 12 or 14 where a relative was attending who was born in 1867. I remember being so intrigued by the fact that she was born two years after the end of the Civil War. I wish I had been motivated to ask many questions of her," Matthew reflects. "My Aunt Mabel took and collected photographs; the way people dressed and the way buildings had changed over the years always fascinated me. The architecture and character of the old buildings are so much more interesting than most of the newer buildings."

Matthew became a member of the Green County Historical Society (GCHS) in 1986 and used part of an inheritance gift to become a life member in 1993. In 2004,



he moved back to Monroe and was elected to the historical society's board shortly after.

"When I moved back to Monroe, the society did not have many monetary assets, yet had a building that was more than 140 years old and in need of many repairs," Matthew explains. The Monroe Fund, along with community supporters, took notice of the society's needs and granted funds to make much-needed improvements.

One of Matthew's last major projects before his recent retirement was to refurbish all of the stained glass windows, some that were original to the building, at a cost of nearly a quarter million dollars. The group reached out to the community and applied for Monroe Fund grants and was able to have the windows finished several years sooner than expected. In addition to qualifying for grants, the GCHS had an established endowment within the Community Foundation of Southern Wisconsin and paid the last \$22,000 for the project from the earnings of their endowment fund.

"Had it not been for the Monroe Fund, we would not have been able to make the improvements that we did," Matthew says.

The Monroe Fund went on to inspire Matthew Figi in other ways, too. After seeing the difference the impact of a gift left by local residents, Albert and Marion Deppeler, had on so many nonprofit organizations in the county, he set out to establish a charitable fund and a scholarship fund within the Community Foundation of Southern Wisconsin. The Matthew L. Figi Charitable Fund and the Matthew L. Figi Scholarship Fund now serve as legacies for someone who dedicated his life to the past and made a beautiful promise to Monroe's future.



# THE START OF A SMALL TOWN'S FUND MAKES A BIG IMPACT

Establishing endowments means gifts continue to benefit communities for generations to come.



**The Cuba City - City of Presidents Fund** started in 2010 with \$40,000. Today it totals more than \$100,000, representing substantial growth in a short amount of time, and impressive fundraising for a small town like Cuba City.

Cuba City is rich in its history and is home to the "Parade of Presidents" — one of the longest lasting remaining bicentennial projects still going on in the U.S. Preserving it and all it stands for is the mission of the Cuba City - City of Presidents Endowment Fund at the Community Foundation.

Cuba City may be considered a small town, but it acted with big-city vision



when it committed to preserving its history by creating an endowment fund.

"We were very fortunate to have strong support from organizations, businesses, individuals, and great fundraising events such as Presidential Balls and flag sales," says Donna Rogers, President of the City of Presidents Committee. "It is with the Advisory Board, the entire City of Presidents team and our community that we were able to develop the endowment fund to preserve and enhance the projects and services that make Cuba City great."

The Cuba City-City of Presidents Endowment Fund has grown enough for



it to rely more on memorial donations and the interest from their fund so the spendable portion of it meets their mission of supporting the City of Presidents Committee projects such as water tower, Veteran's Memorial, Presidential Courtyard, Main Street shields and flags, or new projects that promote or enhance the beauty of Cuba City.

"We are already a strong community, but the more we invest in it, the better it will be for generations to come," Donna says. "We know the value of an endowment fund when it comes to sustaining support to make our community even better."



## Impact

**2015**

Holiday Decorations for  
Downtown Beautification

**2017**

Painting Presidential Caboose  
Development of Plans for  
Presidential Library &  
Presidential Museum

**2018**

New Lettering on the  
Water Tower Landmark

**2020**

Improvements to the  
Presidential Courtyard



# DONORS HELP WITH CRISIS THROUGH THE PLATTEVILLE FUND

Matching gifts programs double the impact a grant can have.

**When the Coronavirus pandemic took hold** of the world back in March, The Platteville Community Fund took immediate action to help local nonprofits meet the increasing needs that would arise from the effects of COVID-19. Past fundraising success positioned the Platteville Community Fund (PCF) to be able to help take the lead in organizing a conduit of giving where people who wanted to help during the crisis could donate and organizations who needed help could get it. Without hesitation, the PCF Advisory Board created the Platteville Community Fund COVID-19 Disaster Relief Fund.

From the start, many local organizations had concerns of not being eligible for the Paycheck Protection Program offered by the government. Others knew their agency would have profound increases in needs from those now unemployed because of the pandemic, including food and shelter. With its commitment to match donations 1:1 up to \$20,000, the Platteville Community Fund asked the public to help match or exceed the amount by making charitable gifts to the fund immediately for the fastest response. The community responded by giving more than \$30,000 and today, due to the fund's match, more than \$41,000 in grants have gone to help nonprofits in the Platteville School District with coronavirus-related needs.

The Platteville Main Street Program used their grant to help individuals cover their basic needs (food, electricity). The Platteville Museum, Wisconsin Badger Camp, Opportunities Inc. and Platteville Area Senior Services, Inc. received help to supplement lost income that could meet critical budgetary needs as result of cancelled fundraising events. Some received grants to purchase personal protective equipment needed in order to continue serving the community. And other grants went to organizations directly helping families, especially those who lost employment and struggled to meet monthly expenses such as rent and utilities.

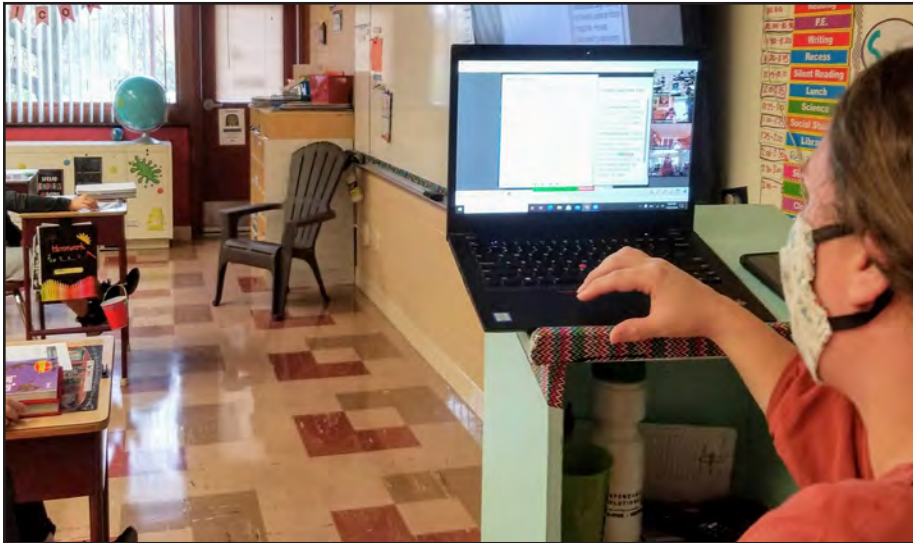
"We knew there were immediate and unexpected needs caused by the pandemic," says Platteville Community Fund Chair, Nathan Curry. "We had the ability to help local organizations weather the financial storm caused by the pandemic and help ensure that those organizations will be around to continue to help and provide their services now and in the future."





# NAMED FUND POWERS NEW WAY OF TEACHING

Donors can leave local legacies by naming a fund within a Community Fund.



**For years,** schools followed the basic principles of learning with printed books and on paper. This year, nearly all schools nationally had to design this fall's semester around laptops and tablets. So when kids in the Lancaster (Wisconsin) Community School District and St. Clement School in Lancaster left school last spring to finish out the academic year at home, the resources needed for effective virtual teaching and successful remote learning required careful examination.

The closing of in-person learning caused administrators and teachers to scramble to find the best ways to continue educating with aging equipment. The Lancaster Community School District and its neighboring St. Clement School had a conversation early on about their technology needs and set out to apply for a combined grant from the Lancaster Community Fund's Charles "Sonny" Tiedemann Fund. Upon review, their grant of \$43,000 was awarded to outfit teachers with new laptops to meet the important educational needs during the pandemic and beyond.

"Typically, we are able to purchase just one to two new computers each year for our teachers because of budgets," explains St. Clement Principal, Josh Jensen. "Working with older computers, we knew we'd face challenges with connections to homes and in virtual professional development meetings. This grant came at a much-needed time."

In all, the schools requested half of the cost of a computer for every teacher. Lancaster Community School District was able to purchase 84 new laptops and St. Clement purchased 12. The remaining costs were covered through budgets, donations, and fundraising. The upgrade has been noticeable. According to Josh, the pictures on screen are much clearer, the laptops are lighter for carrying back and forth, and they are faster, making lessons more fluid.

"We can't thank the Lancaster Fund enough," says Josh. "We are so appreciative of their willingness to work with us, the kids in the community and, actually, the entire community. It's made a big difference."

# COMMUNITY FOUNDATION OF SOUTHERN WISCONSIN

## STATEMENT OF FINANCIAL POSITION

June 30, 2020 and 2019

ASSETS	2020	2019
Cash, investments and other assets	61,050,392	59,175,652
Accounts and pledges receivable	482,617	542,238
<b>Total assets</b>	<b>61,533,009</b>	<b>59,717,890</b>
LIABILITIES		
Accounts payable and accrued payroll	37,442	24,874
Grants and scholarships payable	1,983,377	1,952,963
Funds held for the benefit of others	3,035,435	3,283,369
Other liabilities	58,409	58,209
<b>Total liabilities</b>	<b>5,114,663</b>	<b>5,319,415</b>
NET ASSETS		
Without donor restrictions	55,756,947	53,686,488
With donor restrictions	661,399	711,987
Total net assets	56,418,346	54,398,475
<b>Total liabilities and net assets</b>	<b>61,533,009</b>	<b>59,717,890</b>



## STATEMENTS OF ACTIVITIES

Years ended June 30, 2020 and 2019

REVENUE	2020	2019
Contributions and other revenue	3,843,644	4,870,652
Investment activity	3,229,071	3,443,106
Less revenue from funds held for others	(244,391)	(274,196)
<b>Total revenue</b>	<b>6,828,324</b>	<b>8,039,562</b>
EXPENSES		
Grants and program expenses	4,639,937	4,120,984
Less expenses from funds held for others	(355,011)	(161,441)
Management and general	479,318	455,883
Fundraising	44,209	44,667
<b>Total expenses</b>	<b>4,808,453</b>	<b>4,460,093</b>
Change in net assets	2,019,871	3,579,469
Net assets at beginning of the year	54,398,475	50,819,006
<b>Net assets at end of the year</b>	<b>56,418,346</b>	<b>54,398,475</b>



Subject to Audit.

Audited financial statements and the Foundation's IRS 990 are available at the Community Foundation of Southern Wisconsin or online at [www.cfsww.org](http://www.cfsww.org)

# MEET OUR BOARD OF DIRECTORS



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† deceased

\* **Founding Board Member**

Special thanks to Wegner CPAs for  
sponsoring this report.



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