



IN THE SPIRIT OF COMMUNITY RESILIENCE

COMMUNITY FOUNDATION OF SOUTHERN WISCONSIN
ANNUAL REPORT 2020-2021

LOOKING BACK PROUDLY

Another year passed and the pandemic's effects continued to reach far and wide: youth and education; healthcare; mental health; family gatherings; civic events; and more, have been tested like never before. But our communities shared generously, allowing the Foundation to help lessen the impact on vital services through meaningful, measurable grants and gifts.

A year of **resilience**. Because of big-hearted donors throughout our region and beyond, we created 43 new funds to match an impressive spirit of giving to community need.

A year of **opportunities**. As the world moved toward working remotely, our staff, board of directors, and advisory boards connected through technology to stay updated and active. We launched the Foundation's first Southern Wisconsin Incentive for Tomorrow (*SWIFT*) Matching Grants Initiative, matching more than \$80,000 dollar for dollar for participating CFSW community funds in less than 48 hours -- much of which was used to grow endowments in order to combat the challenges of today, like COVID 19.

A year of **forward-thinking**. Our Board of Directors officially approved a five-year strategic plan in October, 2020 to focus on the transparency and relationship-building with all of our component funds and advisory boards. Soon, a new in-house social media platform, CFSW Connect, will unite advisory board members and provide access to valuable resources.

While we never know what the next year will bring, rest assured we are all better prepared, having learned a great deal about community spirit in the face of a crisis. Know that you can count on the Community Foundation of Southern Wisconsin to help our communities become **healthier, brighter, and stronger than ever before**.




Wyatt D. Jackson, President/CEO
email: wyatt@cfsw.org
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The Janesville Office

OUR IMPACT

2020-2021

TOTAL FUNDS	744
NUMBER OF GIFTS	4,848
GRANTS AWARDED	764
SCHOLARSHIPS AWARDED	538
TOTAL ASSETS	\$78,555,626
TOTAL GRANTS	\$2,509,249
TOTAL SCHOLARSHIPS	\$841,148
TOTAL GRANTS/ SCHOLARSHIPS	\$3,350,398

OUR MISSION

Matching personal philanthropy with community need. We will be there. For Good. Forever.®



THE MEANING OF FOR GOOD, FOREVER.®

In the case of the Community Foundation of Southern Wisconsin, *For Good* has two meanings: making a positive difference in our local communities by supporting critical nonprofit initiatives, and making sure that support lasts long-term. *Forever* means our permanent funds are carefully invested so as the initial investment continues to grow in perpetuity, its earnings can be given out in meaningful grants each year.

OUR REACH

COMMUNITY FUNDS

Argyle Community Fund	Janesville Generations Fund
Benton Community Fund	Lancaster Community Fund
Blanchardville/Hollandale Fund	Milton Fund
Crawford County Community Fund	Mineral Point Community Fund
Cuba City Community Fund	Monroe Fund
Darlington Area Community Fund	New Glarus Community Fund
Edgerton Community Fund	Platteville Community Fund
Elkhorn Community Fund	Shullsburg Community Fund
Evansville Community Fund	South Wayne Community Fund

EXCELLENCE IN EDUCATION FUNDS

Argyle EIE Fund
 Belmont EIE Fund
 Black Hawk EIE Fund
 Carol Aulabaugh EIE Fund - Parkview School
 Darlington EIE Fund
 Hillsboro EIE Fund
 Iowa Grant Educational Foundation
 Janesville Education Foundation
 Mineral Point EIE Fund
 Monroe EIE Fund
 Monticello EIE Fund
 New Glarus EIE Fund
 North Crawford EIE Fund
 Pecatonica EIE Fund
 Platteville EIE Fund
 Winskill School Scholastic Endowment EIE

GIFTS THAT MATCH YOUR CHARITABLE GOALS

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 www.cfsw.org 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 CFSW as the beneficiary of your IRA 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.

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

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 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.

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 community need.

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 work of one or more nonprofit organizations. Because a gift is given through the 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.

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.



NAMED SCHOLARSHIP FUND

SHARING THE LOVE OF THE LAND

Local farmer, John Deetz, loved the land and his community so much he gifted a portion of his estate to enhance the South Wayne Community Fund and give local students in Lafayette County High Schools the opportunity to make a difference in agriculture.

John C. Deetz was a fifth generation farmer on the family's land. He attended a one-room grade school in West Wayne, graduated from South Wayne High School, and attended the University of Wisconsin Farm Short Course in 1950. He entered into a farming partnership with his father in 1951 and continued farming for more than 64 years, dedicating himself to soil conservation and soil biology. John Deetz passed away in 2018 at the age of 88.

Wanting to continue support of community and youth's interest in farming, he gifted \$25,000 to the South Wayne Community Fund and more than \$900,000 from his estate to establish the John C. Deetz Scholarship Fund. The fund awards a scholarship for post-secondary education in agricultural to at least one graduate from each of the seven high schools in Lafayette county.



WHAT WILL YOUR LEGACY BE?

Designating your local community fund in your will or living trust is one of the easiest gifts you can make. Contact your financial advisor to get started. Or for more information, contact CFSW today.
(608) 758-0883

COMMUNITY GRANT IMPACT

PROMOTING THE BEAUTY WITHIN

The Swiss Center of North America is a gateway to New Glarus, WI from U.S. Highway 39. With its gardens more than 15 years old and drastically showing overgrowth with weeds and unwanted material, it was time for an update. As Eric Schmidt, owner of Schmidt Landscaping, and Beth Zurbuchen, president of the Swiss Center, walked around the building last spring, Schmidt made a short but significant comment, “This doesn’t show well at all, does it?”

With a grant from the Dr. Fred W. and Alice J. Kundert Charitable Fund of the New Glarus Community Fund, and two donor-pledges of \$1,000 each, the old landscaping was replaced with flowers that grow naturally in the local area. By making The Swiss Center’s landscape more complex, the group created a welcoming habitat not only for visitors, but for native pollinators: bees, butterflies and other insects. The new plantings will last for many years and provide continued pride to those who visit the Swiss Center.

“After the work was complete, it was truly magical to see that butterflies and bees were immediately drawn in,” says Beth. “Nothing is more delightful than a garden in bloom all season long. Thanks to the Community Foundation of Southern Wisconsin, we now have an oasis buzzing with pollinator activity on the outside of the Center that matches the beauty within.”



DISCOVER YOUR LOCAL COMMUNITY FUND.

To learn more about all of our Community Funds, call us today at (608) 758-0883, visit www.cfsw.org. Meet our staff on page 17.

COMMUNITY VOLUNTEER FEATURE

GIVING BACK WITH HEART & HANDS



CAROL MCDANIEL

Carol McDaniel was considered the “Bluebird of Happiness.” Trying to save baby bluebirds whose parents died earned her that moniker and fueled a passion to restore Wisconsin’s bluebird population. In 1981, she organized the Lafayette County Bluebird Society, serving as president. She previously

served as president and director of the Bluebird Restoration Association of Wisconsin and during her tenure as vice president and director of the North American Bluebird Society helped bring the national headquarters to Darlington. A long-time friend of CFSW, Carol was instrumental in establishing the Lafayette County Bluebird Society Legacy Fund and was also a beloved librarian and library director in Darlington and Argyle where she wrote and secured program grants from their respective community funds. Carol passed away in May, 2021.



JILL KNIGHT

Jill Knight has given her time to the Benton Community Fund, serving as chairperson, since it began in 2011. As a youngster she watched her parents model the importance of giving back to the community and says her love of the village and the fact that a community fund would benefit non-profits in our small town longterm drives her volunteerism. “It’s been rewarding to

see wonderful responses from gifts from hundreds of donors and a thrill to see our grant awards impact numerous non-profit organizations,” says Jill. “The most touching moment was when I received notification of a bequest that a former resident had made. It actually brought tears to my eyes and validated that the time spent volunteering was truly making a difference.”



ROBERT YAHR

It’s hard to imagine that a barren, unsightly abandoned sand and gravel pit covered in debris could become a vision of beauty, but Dr. Robert “Bob” Yahr did just that: imagined that through an ambitious service project for Janesville Rotarians, the land could transform into a place of nature, tranquility, tourism, and more. His dream

became a reality in 1988 when he started Rotary Botanical Gardens with donated dirt, and today the Gardens are Janesville’s largest tourist attraction. In 1993, to further cement the idea of legacy and sustainability, Gardens staff established their organization’s endowment with CFSW, starting with just \$2,400. Since then, its reached \$2 million, helping to ensure the Gardens will be a top tourist spot for generations to come. Dr. Yahr passed away in March 2021, leaving his generous spirit and love of gardening to be remembered among the thousands of colorful flowers, trees, and plants.



CAMILLA OWEN

If a name were ever synonymous with community service it would be Camilla Owen. If there’s a cause Camilla believes in there’s no doubt she will be supporting it. CFSW has been fortunate to have several initiatives Camilla involved herself in: As a retired teacher, she has led the Janesville Education Foundation; as an advocate for women and girls, she served on the Women’s Fund; as a supporter of

equality and diversity, she was an active committee member of the Janesville Multicultural Teacher Scholarship. In addition, Camilla has served on countless committees and helped at hundreds of community fundraising events throughout the years — a true catalyst for positive change!

FUND CREATION

REMEMBERING SOMEONE YOU LOVE

On February 16, 2021, Remington Viney lost her life in a tragic aviation accident. Her family, from Sun Prairie, WI, reached out to the Community Foundation of Southern Wisconsin to establish the Remington Viney Legacy Fund as a way to honor her and support of women in aviation careers. Within just a few months, the fund raised enough money to award its first grant. Its principal will continue to grow and award grants to nonprofit organizations who give scholarships that match the fund's mission. Remington's father, Kevin Viney, presented the first award from the fund in August on behalf of the Women in Aviation International (WAI) Four Lakes Chapter.

“Remington made such a positive impact on so many people’s lives — more than we could’ve ever imagined. And we as a family wanted to find a way for her inspiring influence to continue after her untimely passing,” Kevin explains the motivation for starting the fund. “Her journey through aviation was helped by many generous scholarships and we know that she would be so proud to have her name associated with allowing someone else the opportunity to fulfill their aviation dreams,” says Kevin.

Remington was also a member of the National Guard so her family felt it important that the first scholarship award go to a fellow service member. They worked with the WAI Four Lakes Chapter to select Jacquelynne Miller as the 2021 recipient of the Remington Viney Legacy Fund Scholarship of \$5,000 in order to further her flourishing aviation career.



Jacquelynne Miller receives the first scholarship made possible by the Remington Viney Legacy Fund.

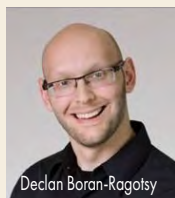


WANT TO START YOUR OWN FUND?

Establishing your own named charitable fund doesn't require great wealth and isn't complicated. Our knowledgeable team will work with you every step of the way to create a fund that best achieves your charitable goals, such as honoring or remembering a loved one. Call us today to find out how! (608) 758-0883

COMMUNITY GRANT IMPACT

DANCING WITH NO LIMITS



In a world designed primarily for non-disabled people, those with disabilities often face challenges to participate in recreational activities. One local group is working to dismantle those barriers and make dance accessible to everyone with the recent creation of No Limits Life Dance Academy (LDA) Program. It also aims to do that free of charge to families so that no participant is turned away because of financial hardship. As the only program of its kind in Rock County, the Janesville Generations Fund took notice and awarded a grant from its Marion and Robert Lietz Fund to enhance its programming.

Under the direction of Declan Boran-Ragotsy, a teacher of Special Education in the Milton School District, No Limits LDA not only makes dance fun, accessible and unrestrictive to participants from youth to adult, it serves as respite time for parents and caregivers.

“I am beyond humbled and ecstatic we received this grant,” says Declan. “It is so imperative that the arts become more inclusive for people with disabilities and I’m extremely thankful No Limits can be a part of this human rights movement. With the support of this grant, we will be able to expand our program in the future from dance to other arts programs as well.”

In addition to supporting general programming, grant funds allowed No Limits to purchase new sensory equipment, expand classes, and start a tiny tots program.



No Limits Dance Participants proudly pose for photographer, Sarah Kaveggia.



YOUR GIFT MAKES A DIFFERENCE.

As a multi-charity organization, CFSW has access to a breadth of local non-profits doing great work throughout our region. Talk to your Donor Services Rep (page 17) for the gift options best suited to your goals.
(608) 758.0883



The staff of New Beginnings APFV take part in a team-building experience to better serve those affected by family violence.

COMMUNITY GRANT IMPACT

LEARNING THE SIGNS

Domestic violence can impact the safety of an entire community. Addressing this critical issue in Walworth County is New Beginnings APFV (Association for the Prevention of Family Violence.) With a grant from The Elkhorn Fund's Lori Genske Endowment Fund, New Beginnings created a program called "Raise the Bar" to increase awareness and educate the local community in the areas of domestic violence, sexual assault, human trafficking, stalking and harassment.

The group's objective was to inform, teach and support community members in recognizing and reporting violent crimes to authorities. From January to July, 2021, New Beginnings offered 36 community and/or private presentations in Elkhorn alone, reaching approximately 2,000 individuals.

The grant helped the organization narrow its educational presentations to Elkhorn specifically and buy up-to-date materials on dating, bullying, harassment and more to share with community members.

"New Beginnings is grateful for this funding," says Suzi Schoenhof, Executive Director of New Beginnings. Overall, Suzi said the project enhanced the organization's presence and shared the important message of domestic violence in Elkhorn. "Having a county (and a half)-wide responsibility limits both resources and income, but all in all, we are proud of the work we accomplished," Suzi explains. "This, in part, is due to the Elkhorn Community Fund! Thank you!"



LEARN MORE ABOUT COMMUNITY FUNDS.

CFSW manages funds throughout a 9-county region in southern Wisconsin. Learn more about the community fund in your area at www.cfsw.org or call us today at (608) 758.0883.

COMMUNITY GRANT IMPACT

KEEPING US SAFE AND SECURE

The Evansville Fund kept public safety top of mind when they granted funds to the Evansville Police Department. The EPD was able to purchase additional body cameras and squad cameras to equip each patrol officer and command staff.

Now, the agency has 15 body cameras and five squad car cameras to assist law enforcement, and be more transparent with the public it serves to protect.

“These body cameras and squad video systems help build trust in the community, hold citizens and police officers accountable and act as a tool for conducting interviews anywhere an officer might be,” explains Evansville Police Chief, Patrick Reese. “They also help us to preserve valuable evidence at scenes and help in prosecutions.”

While a majority of funding came from the City of Evansville, Chief Reese credits this grant funding for helping to reach its goal of upgrading old equipment to more effective and improved technology.

“We are grateful that our small police department was able to secure funding to purchase the best cameras out there,” says Chief Reese. “Not only is it a benefit to law enforcement, it’s a community benefit, too.”



DID YOU KNOW ENDOWMENTS ARE BUILT TO LAST?

An endowment fund is an investment fund in which only a portion of the income earned is spent annually while the remainder is added to the principal for growth. An endowment is a perpetual gift. To a donor, this represents stability and assurance that their gift has long-lasting charitable potential. To a grantee, it tells the story they intend to be around for years to come. Our Community Funds and Excellence in Education Funds are endowment funds, meaning generations from now, they'll still be helping our communities! To learn more, call us today. 608.758.0883

FUNDRAISING & FRIEND-RAISING

PIVOTING TOWARD SUCCESS



During the uncertain times of the pandemic, many nonprofits felt the financial impact when they could no longer hold fundraising events. The Platteville High School Scholarship Fund adjusted the cancellation of its annual “It Takes a Village” Auction and Dinner by pivoting to a virtual Facebook Live raffle event, and proved it was as successful as past attended events.

Canceling fundraising wasn’t an option for the “It Takes a Village” event committee, led by Kerri Sue Stange, chairperson. Each member felt a strong need to support the Class of 2021 and increase the endowments for students in the future. Since the committee had already solicited prizes for the auction, they were able to use them for a raffle and ended up offering \$1000 in cash prizes, plus many other prizes and baskets for those who tuned in to Facebook Live.

“The PHS Scholarship Fund is essential to our community because it allows our students to have a small portion of their school paid for, and contributes to their future,” says Kerri Sue. “We need to continue to support our students and give them that opportunity.”

The committee raised more than \$25,000 — the same amount raised in 2019. It awarded more than \$15,000 in scholarships to the Class of 2021 and put nearly \$10,000 into the endowment.

COMMUNITY PARTNERSHIP

PARTNERING WITH CAPABLE AGENCIES



The Crawford County Community Fund (CCCF) met a critical community need when it began the Crawford Markets Care Program in 2009. The program linked farmers markets with financially challenged families through a voucher program administered through area food pantries. To reduce costs and become more streamlined, the Fund transferred the program to the experienced CouleeCAP (Community Action Program in Crawford County) to monitor and administer. And since the Crawford County Community Fund’s goal is to raise funds to meet community need, it continues to help sustain the program through grants and soliciting other sponsorships.

Crawford Markets Care is designed to help low income families purchase fresh locally grown and/or produced food items by providing them with \$5 vouchers that can be redeemed at Crawford County Farmer’s Markets. In 2020, participants redeemed \$2,390 worth of vouchers.

“We’re not only promoting healthy living and eating, but also generating income to the vendors — our local farmers/growers,” explains Lori Bekkum, CCCF Chair.



KNOW OF A COMMUNITY NEED?

The Community Foundation and its funds are designed to match charitable giving with community need. If you know of a need of a qualified non-profit organization in your community, visit www.cfsw.org for grant opportunities or call (608) 758-0883.

COMMUNITY GRANT IMPACT

EXPLORING NATURE

When Family Connections of Southwest Wisconsin wanted to offer an educational nature program in two local areas, it happened to be in two communities that have community funds within CFSW. As a result, the Platteville Community Fund and the Darlington Community Fund awarded grants to Family Connections to offer local youth learning experiences through natural exploration.

“We are a very small Family Resource Center with limited funds so we could not have offered these events without the grant,” says Renee Krahenbuhl, Executive Director of Family Connections. “We had so much fun and so did the children, many smiles!”

One morning a month from June until October in Darlington, and three evenings from June to August in Platteville, eager participants joined in on outdoor fun and exciting learning opportunities that included: sensory experiences, art, music, and nutritious snacks. Kids learned about butterflies and other insects, flowers, trees, camping, and more.

“With kids having been inside for many months, we felt it was important for them to get outside and play,” explains Renee. And according to Renee, the events proved successful based on positive feedback and number of participants, averaging 20-40 kids in each session. When the August and October events in Darlington got rained out, the Family Connections team made up packets of the activities and snacks and delivered them to local childcare providers. The group also plans to offer the program next summer, too.

NAMED FAMILY FUND

GIVING THROUGH (& FOR) GENERATIONS

Larry and Mary Faith Argall Family Fund

Larry and Mary Faith Argall were born and raised in Mineral Point and graduated from Mineral Point High School as did their children. In 2017, the entire Argall Family of Mineral Point, WI decided to switch their traditional Christmas family gift exchange to giving a combined present that would last forever. Daughter, Lori Pittz, was serving on the advisory board of the Mineral Point Community Fund and suggested a named family fund as their gift back to the community, and, in a large sense, to each other. In 2018, the family pledged \$10,000 to be raised in four years in celebration of their parents' 65th wedding anniversary and their 85th birthdays, and in honor of their love of Mineral Point.

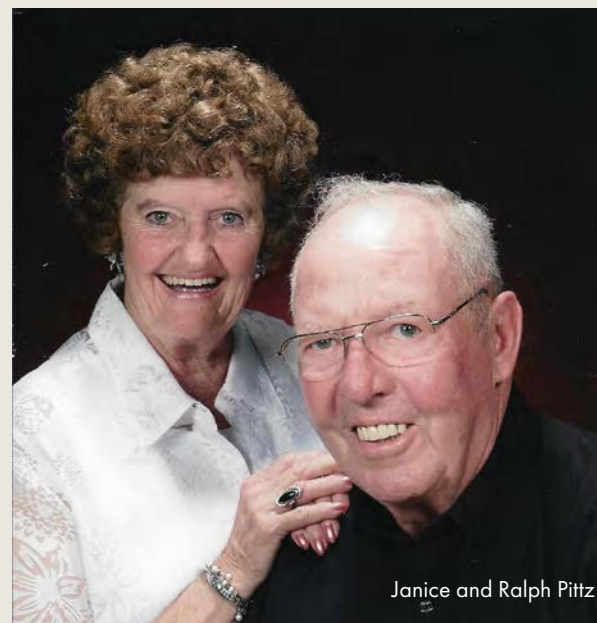
Ralph and Janice Pittz Family Fund

Since Lori's husband, Tony, was involved in the creation of the Argall Family Fund, he invited his family to do the same, jokingly not to be "outdone" by the Argalls. His parents, Ralph and Janice passed away in 2012 and 2020 respectively, making it the perfect way to remember both of them. Ralph and Janice were both born and raised in the Mineral Point area and graduated from Mineral Point High School. All eight of their children graduated from MPHS and six out of the eight children continue to live in Mineral Point in which they are raising their own families. To honor their parents' memory and love of Mineral Point, they established the Ralph and Janice Pittz Family Fund in 2021 with a \$10,000 donation that, because of a CFSW matching-grant at the time, doubled in amount.

"I tell other families that it is an easy process and such a great way to keep our money in our community, says Lori. "This endowment provides a way for family and friends to invest in Mineral Point and honor the legacy of our families forever."



Mary Faith and Larry Argall



Janice and Ralph Pittz



CREATE A NAMED FUND!

It's one of the most beautiful ways to be charitable. Call or visit your local Donor Services Rep (page 17) to learn about all your giving options. (608) 758-0883

MEET THE TEAM WHO CAN HELP

608.758.0883 • WWW.CFSW.ORG

The Community Foundation of Southern Wisconsin has offices in three geographic locations throughout the region staffed with a professional team that will help you with giving and granting to your community. From donating to an existing fund, establishing a fund or scholarship as a way to give back to

your community, learning about grants to local nonprofit organizations to volunteering and more, our team is dedicated to matching personal philanthropy with community need, for good and forever. We welcome you to call or visit us at any of our offices.

JANESVILLE OFFICE & GIFT PROCESSING CENTER

Office Address: 121 N. Parker Dr.
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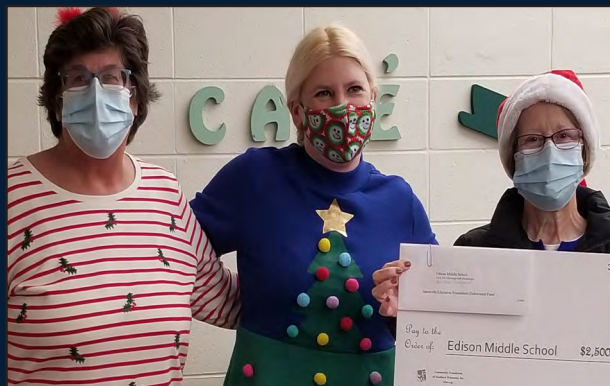
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Edison students in Janesville received funding to create Glowforge - a 3D Laser Printer from the Janesville Education Fund fall 2020 grant cycle. Students are able to create and use different mediums to engrave, emboss, cut and bring creations to life.



Grants of \$160,586 were awarded by Lancaster Community Fund to organizations represented by: Front L-R: Kay Young, Tracey Lee Roberts, Sarah Williams, Brian Knapp, Eric Mumm. Back Row L-R: Aaron Cooley, Lori Busch, Marty Busch, Jeff Boughton, Mayor David Varnam, David Carlson, Hap Daus.



Friends of Silverwood Park applied for and received a \$1600 grant from the Edgerton Community Fund supporting its K-12 agricultural educational programming with access to research and presentation technology.



A \$16,000 grant was presented to Platteville Area Pickleball Association for a championship court to be named as the "Platteville Community Fund in honor of the Robert & Marian Graham Community Fund."



A grant from the Janesville Generations Fund/ Esther Geffs Fund and the Milton Fund, the City of Janesville Fire Department's Dive Team was able to buy new dive suits to aid in the cold-water rescue of those in trouble.



Check out the new Platteville Community Fund Kiosk at the entrance to the Platteville Community Arboretum David Canny Rountree Branch Trail! (Made possible in partnership with The Shopping News and Woodward Printing Services.) L-R: Kathy Nuemeister, Kathy Lomax, Eileen Nickels, Kim Brodbeck and Cindy Voigts.)

PEOPLE, PLACES & PROJECTS MAKING A DIFFERENCE THROUGHOUT NINE COUNTIES



The Shullsburg Community Fund awarded a grant to its local library to keep books safely accessible through organized, straight and visible displays.



The Monticello Excellence in Education Fund helped students celebrate an end to their tall-tale lesson with a lumberjack-style breakfast cooked by the staff. Students dressed up as a tall-tale character and enjoyed pancakes, sausage, and applesauce.



The Monroe Excellence in Education Fund helped make the 2020 school year brighter after it being impacted by the pandemic by supporting new, fun educational materials to local classrooms.



The Argyle Community Fund proudly supports Historic Argyle with grants that help with maintenance projects and long-term operational needs.



The Blanchardville/Hollandale Area Fund provided a grant for upgraded equipment to the Hollandale First Responders.



The Hillsboro Excellence in Education Fund presented more than \$5,600 in education grants to educators in the district. L-R, Vanessa Mislivecek (Kindergarten), Sheri Holthe (Business Ed), Erin Jirschele (6th Grade), Stacy Sosinsky (Elementary Special Ed), Angel Board (2nd Grade), Diane Stockwell (2nd Grade), Daniel Faas (Social Studies).

FINANCIAL PERFORMANCE

Statement of Financial Position

June 30, 2021 and 2020

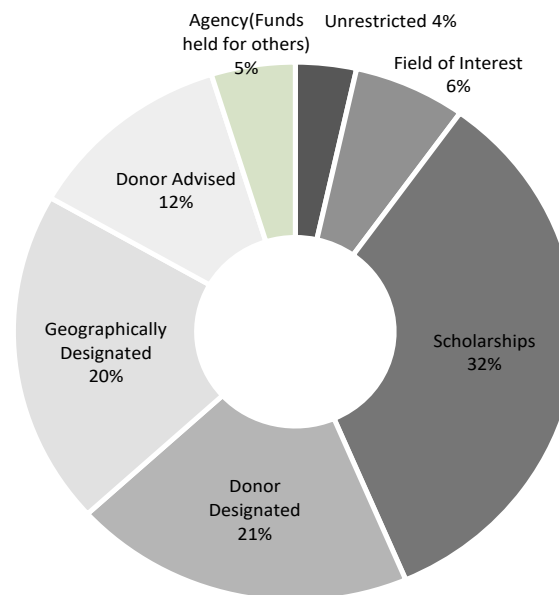
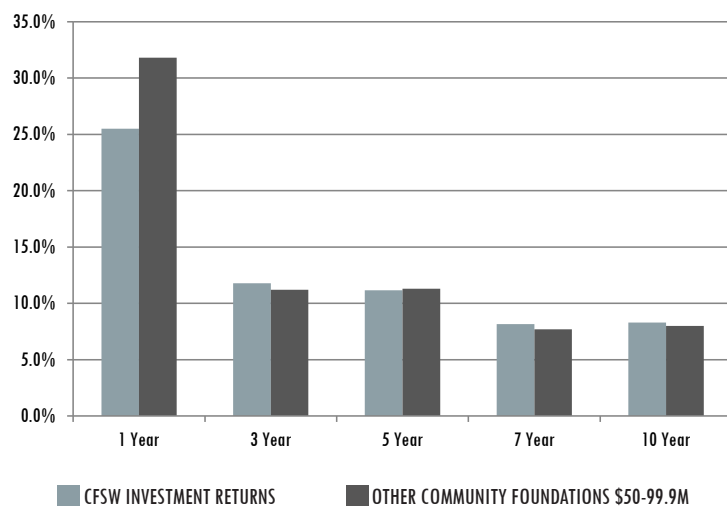
ASSETS	2021	2020
Cash, investments and other assets	78,355,041	61,050,393
Accounts and pledges receivable	200,585	482,616
Total assets	78,555,626	61,533,009
LIABILITIES		
Accounts payable and accrued payroll	43,340	37,442
Grants and scholarships payable	2,294,096	1,983,377
Funds held for the benefit of others	3,785,105	3,035,435
Other liabilities	53,601	58,409
Total liabilities	6,176,142	5,114,663
NET ASSETS		
Without donor restrictions	71,987,042	55,756,946
With donor restrictions	392,442	661,400
Total net assets	72,379,484	56,418,346
Total liabilities and net assets	78,555,626	61,533,009

Statement of Activities

June 30, 2021 and 2020

REVENUE	2021	2020
Contributions and other revenue	6,350,997	3,843,644
Investment activity	15,134,323	3,265,531
Less revenue from funds held for others	(1,220,919)	(244,391)
Total revenue	20,264,401	6,864,784
EXPENSES		
Grants and program expenses	4,241,416	4,639,937
Less expenses from funds held for others	(471,248)	(355,011)
Management and general	421,353	479,318
Fundraising	111,742	80,669
Total expenses	4,303,263	4,844,913
Change in net assets	15,961,138	2,019,871
Net assets at beginning of the year	56,418,346	54,398,475
Net assets at end of the year	72,379,484	56,418,346

INVESTMENT PERFORMANCE FYE JUNE 2021



Subject to Audit.

Audited financial statements and the Foundation's IRS 990 are available at the Community Foundation of Southern Wisconsin or www.cfsw.org

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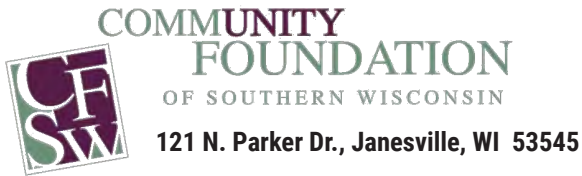
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THIS YEAR'S REPORT TO OUR COMMUNITIES.



Wealth Management Division



The Asset Management Committee of the Community Foundation of Southern Wisconsin monitors the performance investments in conjunction with a team of investment managers from area financial institutions. Our investment managers include: Johnson Bank, BMO Harris, First National Bank & Trust-Beloit, State Bank of Cross Plains, US Bank, Wisconsin Bank & Trust. We also extend our appreciation to Wegner CPAs who conduct our annual audit.