

WEGNER CPAS LLP
2921 LANDMARK PL STE 300
MADISON, WI 53713-4236

COMMUNITY FOUNDATION OF SOUTHERN
WISCONSIN, INC.
121 N PARKER DR
JANESVILLE, WI 53545

|||||

Form **990**

Return of Organization Exempt From Income Tax

OMB No. 1545-0047

2021

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

Do not enter social security numbers on this form as it may be made public.

Go to www.irs.gov/Form990 for instructions and the latest information.

A For the 2021 calendar year, or tax year beginning **JUL 1, 2021** and ending **JUN 30, 2022**

B Check if applicable: <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Final return/terminated <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	C Name of organization COMMUNITY FOUNDATION OF SOUTHERN WISCONSIN, INC.		D Employer identification number 39-1711388
	Doing business as		E Telephone number 608-758-0883
	Number and street (or P.O. box if mail is not delivered to street address)	Room/suite	
	121 N PARKER DR		G Gross receipts \$ 45,668,019.
	City or town, state or province, country, and ZIP or foreign postal code JANESVILLE, WI 53545		
F Name and address of principal officer: WYATT JACKSON SAME AS C ABOVE		H(a) Is this a group return for subordinates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No H(b) Are all subordinates included? <input type="checkbox"/> Yes <input type="checkbox"/> No If "No," attach a list. See instructions H(c) Group exemption number	

I Tax-exempt status: 501(c)(3) 501(c) () (insert no.) 4947(a)(1) or 527

J Website: **WWW.CFSW.ORG**

K Form of organization: Corporation Trust Association Other **L** Year of formation: **1991** **M** State of legal domicile: **WI**

Part I Summary

Activities & Governance	1 Briefly describe the organization's mission or most significant activities: THE COMMUNITY FOUNDATION OF SOUTHERN WISCONSIN, INC. IS A TAX-EXEMPT NOT-FOR-PROFIT		
	2 Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.		
	3 Number of voting members of the governing body (Part VI, line 1a)	3	15
	4 Number of independent voting members of the governing body (Part VI, line 1b)	4	15
	5 Total number of individuals employed in calendar year 2021 (Part V, line 2a)	5	13
	6 Total number of volunteers (estimate if necessary)	6	459
	7 a Total unrelated business revenue from Part VIII, column (C), line 12	7a	0.
b Net unrelated business taxable income from Form 990-T, Part I, line 11	7b	0.	
Revenue	8 Contributions and grants (Part VIII, line 1h)	Prior Year 5,599,303.	Current Year 6,730,279.
	9 Program service revenue (Part VIII, line 2g)	733,382.	807,788.
	10 Investment income (Part VIII, column (A), lines 3, 4, and 7d)	4,200,505.	5,296,548.
	11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	5,151.	31,902.
	12 Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	10,538,341.	12,866,517.
	Expenses	13 Grants and similar amounts paid (Part IX, column (A), lines 1-3)	3,350,398.
14 Benefits paid to or for members (Part IX, column (A), line 4)		0.	0.
15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)		472,121.	560,717.
16a Professional fundraising fees (Part IX, column (A), line 11e)		0.	0.
b Total fundraising expenses (Part IX, column (D), line 25)		145,385.	
17 Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)		1,211,219.	1,337,621.
18 Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)		5,033,738.	4,893,247.
19 Revenue less expenses. Subtract line 18 from line 12	5,504,603.	7,973,270.	
Net Assets or Fund Balances	20 Total assets (Part X, line 16)	Beginning of Current Year 78,555,626.	End of Year 72,404,533.
	21 Total liabilities (Part X, line 26)	6,176,142.	6,055,097.
	22 Net assets or fund balances. Subtract line 21 from line 20	72,379,484.	66,349,436.

Part II Signature Block

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

Sign Here	Signature of officer WYATT JACKSON, PRESIDENT/CEO		Date _____	
	Type or print name and title			
Paid Preparer Use Only	Print/Type preparer's name MIKE HABLEWITZ, CPA	Preparer's signature MIKE HABLEWITZ, CPA	Date 04/20/23	Check if self-employed <input type="checkbox"/> PTIN P01259157
	Firm's name WEGNER CPAS LLP	Firm's EIN 39-0974031		Phone no. (608) 274-4020
Firm's address 2921 LANDMARK PL STE 300 MADISON, WI 53713-4236				

May the IRS discuss this return with the preparer shown above? See instructions Yes No

COMMUNITY FOUNDATION OF SOUTHERN WISCONSIN, INC.

Form 990 (2021)

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Part III Statement of Program Service Accomplishments

Check if Schedule O contains a response or note to any line in this Part III [X]

1 Briefly describe the organization's mission: THE COMMUNITY FOUNDATION OF SOUTHERN WISCONSIN, INC. IS A TAX-EXEMPT NOT-FOR-PROFIT PHILANTHROPIC GRANTING ORGANIZATION THAT MATCHES PERSONAL PHILANTHROPY WITH COMMUNITY NEEDS THROUGH GRANTS AND SCHOLARSHIPS FROM ENDOWED AND NON-ENDOWED FUNDS. THE COMMUNITY

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? [] Yes [X] No If "Yes," describe these new services on Schedule O.

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? [] Yes [X] No If "Yes," describe these changes on Schedule O.

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

4a (Code:) (Expenses \$ 2,545,631. including grants of \$ 1,917,002.) (Revenue \$ 517,055.) THE COMMUNITY FOUNDATION OF SOUTHERN WISCONSIN CURRENTLY HAS 821 COMPONENT FUNDS SUPPORTING A VARIETY OF CHARITABLE INTERESTS INCLUDING THE ARTS, EDUCATION, THE ENVIRONMENT, HEALTH AND HUMAN SERVICES, AND HISTORIC PRESERVATION. DURING THE YEAR THE COMMUNITY FOUNDATION OF SOUTHERN WISCONSIN PROVIDED GRANTS TO MORE THAN 309 NONPROFIT ORGANIZATIONS TO SUPPORT THEIR CHARITABLE ACTIVITIES.

4b (Code:) (Expenses \$ 1,431,377. including grants of \$ 1,077,907.) (Revenue \$ 290,733.) THE COMMUNITY FOUNDATION OF SOUTHERN WISCONSIN ADMINISTERS A VARIETY OF SCHOLARSHIP FUNDS THAT WERE ESTABLISHED BY INDIVIDUALS, CIVIC ORGANIZATIONS, AND BUSINESSES THROUGHOUT OUR SERVICE AREA. EACH SCHOLARSHIP IS UNIQUE AND SUPPORTS STUDENTS WITH A VARIETY OF BACKGROUNDS, AGES, EDUCATIONAL GOALS, AND ECONOMIC LEVELS. DURING THE YEAR THE COMMUNITY FOUNDATION OF SOUTHERN WISCONSIN PROVIDED SCHOLARSHIPS TO 463 STUDENTS FOR POST-SECONDARY EDUCATION.

4c (Code:) (Expenses \$ including grants of \$) (Revenue \$)

4d Other program services (Describe on Schedule O.) (Expenses \$ including grants of \$) (Revenue \$)

4e Total program service expenses 3,977,008.

**COMMUNITY FOUNDATION OF SOUTHERN
WISCONSIN, INC.**

Part IV Checklist of Required Schedules

	Yes	No
1 Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? <i>If "Yes," complete Schedule A</i>	X	
2 Is the organization required to complete <i>Schedule B, Schedule of Contributors</i> ? See instructions	X	
3 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? <i>If "Yes," complete Schedule C, Part I</i>		X
4 Section 501(c)(3) organizations. Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? <i>If "Yes," complete Schedule C, Part II</i>		X
5 Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Rev. Proc. 98-19? <i>If "Yes," complete Schedule C, Part III</i>		X
6 Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? <i>If "Yes," complete Schedule D, Part I</i>	X	
7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? <i>If "Yes," complete Schedule D, Part II</i>		X
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? <i>If "Yes," complete Schedule D, Part III</i>		X
9 Did the organization report an amount in Part X, line 21, for escrow or custodial account liability, serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? <i>If "Yes," complete Schedule D, Part IV</i>		X
10 Did the organization, directly or through a related organization, hold assets in donor-restricted endowments or in quasi endowments? <i>If "Yes," complete Schedule D, Part V</i>		X
11 If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X, as applicable.		
a Did the organization report an amount for land, buildings, and equipment in Part X, line 10? <i>If "Yes," complete Schedule D, Part VI</i>	X	
b Did the organization report an amount for investments - other securities in Part X, line 12, that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VII</i>	X	
c Did the organization report an amount for investments - program related in Part X, line 13, that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VIII</i>		X
d Did the organization report an amount for other assets in Part X, line 15, that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part IX</i>		X
e Did the organization report an amount for other liabilities in Part X, line 25? <i>If "Yes," complete Schedule D, Part X</i>	X	
f Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? <i>If "Yes," complete Schedule D, Part X</i>		X
12a Did the organization obtain separate, independent audited financial statements for the tax year? <i>If "Yes," complete Schedule D, Parts XI and XII</i>	X	
b Was the organization included in consolidated, independent audited financial statements for the tax year? <i>If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional</i>		X
13 Is the organization a school described in section 170(b)(1)(A)(ii)? <i>If "Yes," complete Schedule E</i>		X
14a Did the organization maintain an office, employees, or agents outside of the United States?		X
b Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? <i>If "Yes," complete Schedule F, Parts I and IV</i>		X
15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any foreign organization? <i>If "Yes," complete Schedule F, Parts II and IV</i>		X
16 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to or for foreign individuals? <i>If "Yes," complete Schedule F, Parts III and IV</i>		X
17 Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? <i>If "Yes," complete Schedule G, Part I.</i> See instructions		X
18 Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? <i>If "Yes," complete Schedule G, Part II</i>	X	
19 Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? <i>If "Yes," complete Schedule G, Part III</i>		X
20a Did the organization operate one or more hospital facilities? <i>If "Yes," complete Schedule H</i>		X
b If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?		
21 Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? <i>If "Yes," complete Schedule I, Parts I and II</i>	X	

Part IV Checklist of Required Schedules (continued)

	Yes	No
22 Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? <i>If "Yes," complete Schedule I, Parts I and III</i>	22 X	
23 Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5, about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? <i>If "Yes," complete Schedule J</i>	23	X
24a Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? <i>If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a</i>	24a	X
b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?	24b	
c Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?	24c	
d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?	24d	
25a Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I</i>	25a	X
b Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? <i>If "Yes," complete Schedule L, Part I</i>	25b	X
26 Did the organization report any amount on Part X, line 5 or 22, for receivables from or payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons? <i>If "Yes," complete Schedule L, Part II</i>	26	X
27 Did the organization provide a grant or other assistance to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity (including an employee thereof) or family member of any of these persons? <i>If "Yes," complete Schedule L, Part III</i>	27 X	
28 Was the organization a party to a business transaction with one of the following parties (see the Schedule L, Part IV, instructions for applicable filing thresholds, conditions, and exceptions):		
a A current or former officer, director, trustee, key employee, creator or founder, or substantial contributor? <i>If "Yes," complete Schedule L, Part IV</i>	28a	X
b A family member of any individual described in line 28a? <i>If "Yes," complete Schedule L, Part IV</i>	28b	X
c A 35% controlled entity of one or more individuals and/or organizations described in line 28a or 28b? <i>If "Yes," complete Schedule L, Part IV</i>	28c	X
29 Did the organization receive more than \$25,000 in non-cash contributions? <i>If "Yes," complete Schedule M</i>	29 X	
30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M</i>	30	X
31 Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I</i>	31	X
32 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II</i>	32	X
33 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I</i>	33	X
34 Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1</i>	34	X
35a Did the organization have a controlled entity within the meaning of section 512(b)(13)?	35a	X
b If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," complete Schedule R, Part V, line 2</i>	35b	
36 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2</i>	36	X
37 Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If "Yes," complete Schedule R, Part VI</i>	37	X
38 Did the organization complete Schedule O and provide explanations on Schedule O for Part VI, lines 11b and 19?	38 X	

Note: All Form 990 filers are required to complete Schedule O

Part V Statements Regarding Other IRS Filings and Tax Compliance

Check if Schedule O contains a response or note to any line in this Part V

	Yes	No
1a Enter the number reported in box 3 of Form 1096. Enter -0- if not applicable	1a 10	
b Enter the number of Forms W-2G included on line 1a. Enter -0- if not applicable	1b 0	
c Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	1c	

COMMUNITY FOUNDATION OF SOUTHERN
WISCONSIN, INC.

Part V Statements Regarding Other IRS Filings and Tax Compliance (continued)

		Yes	No
2a	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return		
	2a		13
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns?	X	
	Note: If the sum of lines 1a and 2a is greater than 250, you may be required to e-file. See instructions.		
3a	Did the organization have unrelated business gross income of \$1,000 or more during the year?		X
b	If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, provide an explanation on Schedule O		
4a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?		X
b	If "Yes," enter the name of the foreign country See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).		
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?		X
b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?		X
c	If "Yes" to line 5a or 5b, did the organization file Form 8886-T?		
6a	Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions?		X
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?		
7	Organizations that may receive deductible contributions under section 170(c).		
a	Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?	X	
b	If "Yes," did the organization notify the donor of the value of the goods or services provided?	X	
c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?		X
d	If "Yes," indicate the number of Forms 8282 filed during the year		
	7d		
e	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?		X
f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		X
g	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?		
h	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?		
8	Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?		
9	Sponsoring organizations maintaining donor advised funds.		
a	Did the sponsoring organization make any taxable distributions under section 4966?		
b	Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?		
10	Section 501(c)(7) organizations. Enter:		
a	Initiation fees and capital contributions included on Part VIII, line 12		
	10a		
b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities		
	10b		
11	Section 501(c)(12) organizations. Enter:		
a	Gross income from members or shareholders		
	11a		
b	Gross income from other sources. (Do not net amounts due or paid to other sources against amounts due or received from them.)		
	11b		
12a	Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?		
b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year		
	12b		
13	Section 501(c)(29) qualified nonprofit health insurance issuers.		
a	Is the organization licensed to issue qualified health plans in more than one state?		
	Note: See the instructions for additional information the organization must report on Schedule O.		
b	Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans		
	13b		
c	Enter the amount of reserves on hand		
	13c		
14a	Did the organization receive any payments for indoor tanning services during the tax year?		X
b	If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation on Schedule O		
	14b		
15	Is the organization subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year?		X
	If "Yes," see the instructions and file Form 4720, Schedule N.		
16	Is the organization an educational institution subject to the section 4968 excise tax on net investment income?		X
	If "Yes," complete Form 4720, Schedule O.		
17	Section 501(c)(21) organizations. Did the trust, any disqualified person, or mine operator engage in any activities that would result in the imposition of an excise tax under section 4951, 4952 or 4953?		
	If "Yes," complete Form 6069.		
	17		

Part VI Governance, Management, and Disclosure. For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes on Schedule O. See instructions.

Check if Schedule O contains a response or note to any line in this Part VI

Section A. Governing Body and Management

		Yes	No
1a	Enter the number of voting members of the governing body at the end of the tax year If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain on Schedule O.		
	1a	15	
b	Enter the number of voting members included on line 1a, above, who are independent		
	1b	15	
2	Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?		X
3	Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, trustees, or key employees to a management company or other person?		X
4	Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?		X
5	Did the organization become aware during the year of a significant diversion of the organization's assets?		X
6	Did the organization have members or stockholders?		X
7a	Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?		X
b	Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?		X
7a			X
7b			X
8	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:		
a	The governing body?	X	
8a		X	
b	Each committee with authority to act on behalf of the governing body?	X	
8b		X	
9	Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses on Schedule O		X

Section B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.)

		Yes	No
10a	Did the organization have local chapters, branches, or affiliates?		X
b	If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes?		
10b			
11a	Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?	X	
b	Describe on Schedule O the process, if any, used by the organization to review this Form 990.		
12a	Did the organization have a written conflict of interest policy? If "No," go to line 13	X	
b	Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	X	
12b		X	
c	Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe on Schedule O how this was done	X	
12c		X	
13	Did the organization have a written whistleblower policy?	X	
14	Did the organization have a written document retention and destruction policy?	X	
15	Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?		
a	The organization's CEO, Executive Director, or top management official	X	
15a		X	
b	Other officers or key employees of the organization		X
15b			X
	If "Yes" to line 15a or 15b, describe the process on Schedule O. See instructions.		
16a	Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?		X
b	If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements?		
16b			

Section C. Disclosure

- 17** List the states with which a copy of this Form 990 is required to be filed **WI**
- 18** Section 6104 requires an organization to make its Forms 1023 (1024 or 1024-A, if applicable), 990, and 990-T (section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.
 Own website Another's website Upon request Other (explain on Schedule O)
- 19** Describe on Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.
- 20** State the name, address, and telephone number of the person who possesses the organization's books and records **LORI MELBY - 608-758-0883**
121 N PARKER DR, JANESVILLE, WI 53545

Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

Check if Schedule O contains a response or note to any line in this Part VII

Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

1a Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
- List all of the organization's **current** key employees, if any. See the instructions for definition of "key employee."
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (box 5 of Form W-2, Form 1099-MISC, and/or box 1 of Form 1099-NEC) of more than \$100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations. See the instructions for the order in which to list the persons above.

Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee.

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) WYATT JACKSON PRESIDENT/CEO	40.00			X			105,142.	0.	11,531.	
(2) TIM MIDDLETON CHAIR	2.00	X		X			0.	0.	0.	
(3) TODD SCHLUESCHE VICE CHAIR	2.00	X		X			0.	0.	0.	
(4) PAUL MAIR TREASURER	2.00	X		X			0.	0.	0.	
(5) GINNY BEAN SECRETARY	2.00	X		X			0.	0.	0.	
(6) ERIN OGDEN IMMEDIATE PAST CHAIR	2.00	X		X			0.	0.	0.	
(7) ELLE SWART MEMBER AT LARGE	1.00	X					0.	0.	0.	
(8) KELLY BAUER DIRECTOR	1.00	X					0.	0.	0.	
(9) JOHN DOWNING DIRECTOR	1.00	X					0.	0.	0.	
(10) JIM CRIFE DIRECTOR	1.00	X					0.	0.	0.	
(11) RICHARD BUSCH DIRECTOR	1.00	X					0.	0.	0.	
(12) DAN WINTER DIRECTOR	1.00	X					0.	0.	0.	
(13) RON SPIELMAN DIRECTOR	1.00	X					0.	0.	0.	
(14) JENNIFER REVELS DIRECTOR	1.00	X					0.	0.	0.	
(15) NANCY NELSON DIRECTOR	1.00	X					0.	0.	0.	
(16) KIM MARKHAM DIRECTOR	1.00	X					0.	0.	0.	
(17) JOE KRANTZ DIRECTOR (THRU DEC)	1.00	X					0.	0.	0.	

**COMMUNITY FOUNDATION OF SOUTHERN
WISCONSIN, INC.**

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Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued)

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
1b Subtotal							105,142.	0.	11,531.	
c Total from continuation sheets to Part VII, Section A							0.	0.	0.	
d Total (add lines 1b and 1c)							105,142.	0.	11,531.	

2 Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization ▶ 1

	Yes	No
3 Did the organization list any former officer, director, trustee, key employee, or highest compensated employee on line 1a? <i>If "Yes," complete Schedule J for such individual</i>	3	X
4 For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? <i>If "Yes," complete Schedule J for such individual</i>	4	X
5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? <i>If "Yes," complete Schedule J for such person</i>	5	X

Section B. Independent Contractors

1 Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization. Report compensation for the calendar year ending with or within the organization's tax year.

(A) Name and business address	(B) Description of services	(C) Compensation
NONE		

2 Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 of compensation from the organization ▶ 0

132008 12-09-21

COMMUNITY FOUNDATION OF SOUTHERN WISCONSIN, INC.

Form 990 (2021)

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Part VIII Statement of Revenue

Check if Schedule O contains a response or note to any line in this Part VIII

			(A)	(B)	(C)	(D)	
			Total revenue	Related or exempt function revenue	Unrelated business revenue	Revenue excluded from tax under sections 512 - 514	
Contributions, Gifts, Grants and Other Similar Amounts	1 a	Federated campaigns	1a				
	b	Membership dues	1b				
	c	Fundraising events	1c	39,811.			
	d	Related organizations	1d				
	e	Government grants (contributions)	1e	10,000.			
	f	All other contributions, gifts, grants, and similar amounts not included above	1f	6,680,468.			
	g	Noncash contributions included in lines 1a-1f	1g	\$ 708,582.			
	h	Total. Add lines 1a-1f		6,730,279.			
	Program Service Revenue	2 a	PROGRAM FEES	Business Code	523991	807,788.	807,788.
b							
c							
d							
e							
f		All other program service revenue					
g		Total. Add lines 2a-2f		807,788.			
Other Revenue	3	Investment income (including dividends, interest, and other similar amounts)		1,499,594.			1499594.
	4	Income from investment of tax-exempt bond proceeds					
	5	Royalties					
	6 a	Gross rents	(i) Real				
			(ii) Personal				
	6 b	Less: rental expenses					
	6 c	Rental income or (loss)					
	d	Net rental income or (loss)					
	7 a	Gross amount from sales of assets other than inventory	(i) Securities				
			(ii) Other				
				36,567,511.			
	7 b	Less: cost or other basis and sales expenses		32,770,557.			
	7 c	Gain or (loss)		3,796,954.			
d	Net gain or (loss)		3,796,954.			3796954.	
8 a	Gross income from fundraising events (not including \$ 39,811. of contributions reported on line 1c). See Part IV, line 18		51,178.				
		8 b	Less: direct expenses	30,945.			
c	Net income or (loss) from fundraising events		20,233.			20,233.	
9 a	Gross income from gaming activities. See Part IV, line 19		11,669.				
		9 b	Less: direct expenses	0.			
c	Net income or (loss) from gaming activities		11,669.			11,669.	
10 a	Gross sales of inventory, less returns and allowances						
b	Less: cost of goods sold						
c	Net income or (loss) from sales of inventory						
Miscellaneous Revenue	11 a		Business Code				
	b						
	c						
	d	All other revenue					
	e	Total. Add lines 11a-11d					
12	Total revenue. See instructions		12,866,517.	807,788.	0.	5328450.	

**COMMUNITY FOUNDATION OF SOUTHERN
WISCONSIN, INC.**

Form 990 (2021)

39-1711388 Page **10**

Part IX Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21 ...	1,917,002.	1,917,002.		
2 Grants and other assistance to domestic individuals. See Part IV, line 22	1,077,907.	1,077,907.		
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	125,129.	35,124.	65,209.	24,796.
6 Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	366,304.	101,133.	193,287.	71,884.
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	14,882.	4,789.	6,889.	3,204.
9 Other employee benefits	19,234.	6,189.	8,904.	4,141.
10 Payroll taxes	35,168.	11,316.	16,280.	7,572.
11 Fees for services (nonemployees):				
a Management				
b Legal	10.		10.	
c Accounting	21,831.		21,831.	
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees	320,466.		320,466.	
g Other. (If line 11g amount exceeds 10% of line 25, column (A), amount, list line 11g expenses on Sch O.)	7,127.		7,127.	
12 Advertising and promotion				
13 Office expenses	38,463.	3,085.	11,794.	23,584.
14 Information technology	63,418.		63,418.	
15 Royalties				
16 Occupancy	34,315.	9,184.	17,345.	7,786.
17 Travel	8,897.	2,483.	4,690.	1,724.
18 Payments of travel or entertainment expenses for any federal, state, or local public officials ...				
19 Conferences, conventions, and meetings	17,450.		17,450.	
20 Interest				
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	1,610.		1,610.	
23 Insurance	3,583.	1,000.	1,889.	694.
24 Other expenses. Itemize expenses not covered above. (List miscellaneous expenses on line 24e. If line 24e amount exceeds 10% of line 25, column (A), amount, list line 24e expenses on Schedule O.)				
a DONOR/FUND EXPENSE	807,796.	807,796.		
b BAD DEBT EXPENSE	4,550.		4,550.	
c MEMBERSHIP DUES	3,146.		3,146.	
d _____				
e All other expenses _____	4,959.		4,959.	
25 Total functional expenses. Add lines 1 through 24e	4,893,247.	3,977,008.	770,854.	145,385.
26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation.				

Check here if following SOP 98-2 (ASC 958-720)

**COMMUNITY FOUNDATION OF SOUTHERN
WISCONSIN, INC.**

Form 990 (2021)

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Part X Balance Sheet

Check if Schedule O contains a response or note to any line in this Part X

		(A) Beginning of year		(B) End of year	
Assets	1 Cash - non-interest-bearing	800,509.	1	945,267.	
	2 Savings and temporary cash investments	6,607.	2	6,619.	
	3 Pledges and grants receivable, net	200,585.	3	4,250.	
	4 Accounts receivable, net	0.	4	1,220.	
	5 Loans and other receivables from any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons		5		
	6 Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B)		6		
	7 Notes and loans receivable, net		7		
	8 Inventories for sale or use		8		
	9 Prepaid expenses and deferred charges	272.	9	669.	
	10a Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	10a 8,050.			
	b Less: accumulated depreciation	10b 3,354.	6,306.	10c	4,696.
	11 Investments - publicly traded securities		11		
	12 Investments - other securities. See Part IV, line 11	77,541,347.	12	71,441,812.	
	13 Investments - program-related. See Part IV, line 11		13		
	14 Intangible assets		14		
	15 Other assets. See Part IV, line 11		15		
16 Total assets. Add lines 1 through 15 (must equal line 33)	78,555,626.	16	72,404,533.		
Liabilities	17 Accounts payable and accrued expenses	43,340.	17	55,616.	
	18 Grants payable	2,294,096.	18	2,452,184.	
	19 Deferred revenue	4,000.	19	0.	
	20 Tax-exempt bond liabilities		20		
	21 Escrow or custodial account liability. Complete Part IV of Schedule D		21		
	22 Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons		22		
	23 Secured mortgages and notes payable to unrelated third parties		23		
	24 Unsecured notes and loans payable to unrelated third parties		24		
	25 Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D	3,834,706.	25	3,547,297.	
	26 Total liabilities. Add lines 17 through 25	6,176,142.	26	6,055,097.	
Net Assets or Fund Balances	Organizations that follow FASB ASC 958, check here <input checked="" type="checkbox"/> and complete lines 27, 28, 32, and 33.				
	27 Net assets without donor restrictions	71,987,042.	27	66,177,591.	
	28 Net assets with donor restrictions	392,442.	28	171,845.	
	Organizations that do not follow FASB ASC 958, check here <input type="checkbox"/> and complete lines 29 through 33.				
	29 Capital stock or trust principal, or current funds		29		
	30 Paid-in or capital surplus, or land, building, or equipment fund		30		
	31 Retained earnings, endowment, accumulated income, or other funds		31		
	32 Total net assets or fund balances	72,379,484.	32	66,349,436.	
	33 Total liabilities and net assets/fund balances	78,555,626.	33	72,404,533.	

Form **990** (2021)

**COMMUNITY FOUNDATION OF SOUTHERN
WISCONSIN, INC.**

Form 990 (2021)

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Part XI Reconciliation of Net Assets

Check if Schedule O contains a response or note to any line in this Part XI

1	Total revenue (must equal Part VIII, column (A), line 12)	12,866,517.
2	Total expenses (must equal Part IX, column (A), line 25)	4,893,247.
3	Revenue less expenses. Subtract line 2 from line 1	7,973,270.
4	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	72,379,484.
5	Net unrealized gains (losses) on investments	-14,288,339.
6	Donated services and use of facilities	
7	Investment expenses	
8	Prior period adjustments	
9	Other changes in net assets or fund balances (explain on Schedule O)	285,021.
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (B))	66,349,436.

Part XII Financial Statements and Reporting

Check if Schedule O contains a response or note to any line in this Part XII

	Yes	No
1 Accounting method used to prepare the Form 990: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other _____ If the organization changed its method of accounting from a prior year or checked "Other," explain on Schedule O.		
2a Were the organization's financial statements compiled or reviewed by an independent accountant? _____ If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both: <input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis		X
b Were the organization's financial statements audited by an independent accountant? _____ If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both: <input checked="" type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis	X	
c If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? _____ If the organization changed either its oversight process or selection process during the tax year, explain on Schedule O.	X	
3a As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133? _____		X
b If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why on Schedule O and describe any steps taken to undergo such audits _____		

Form **990** (2021)

SCHEDULE A
(Form 990)

Department of the Treasury
Internal Revenue Service

Public Charity Status and Public Support

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

▶ Attach to Form 990 or Form 990-EZ.

▶ Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2021

Open to Public Inspection

Name of the organization **COMMUNITY FOUNDATION OF SOUTHERN WISCONSIN, INC.** Employer identification number **39-1711388**

Part I Reason for Public Charity Status. (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 12, check only one box.)

- 1 A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i).**
- 2 A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E (Form 990).)
- 3 A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).**
- 4 A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii).** Enter the hospital's name, city, and state: _____
- 5 An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv).** (Complete Part II.)
- 6 A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v).**
- 7 An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
- 8 A community trust described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
- 9 An agricultural research organization described in **section 170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non-land-grant college of agriculture (see instructions). Enter the name, city, and state of the college or university: _____
- 10 An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions, subject to certain exceptions; and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2).** (Complete Part III.)
- 11 An organization organized and operated exclusively to test for public safety. See **section 509(a)(4).**
- 12 An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2).** See **section 509(a)(3).** Check the box on lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.
 - a **Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. **You must complete Part IV, Sections A and B.**
 - b **Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). **You must complete Part IV, Sections A and C.**
 - c **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). **You must complete Part IV, Sections A, D, and E.**
 - d **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). **You must complete Part IV, Sections A and D, and Part V.**
 - e Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.

f Enter the number of supported organizations

g Provide the following information about the supported organization(s).

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1-10 above (see instructions))	(iv) Is the organization listed in your governing document?		(v) Amount of monetary support (see instructions)	(vi) Amount of other support (see instructions)
			Yes	No		
Total						

COMMUNITY FOUNDATION OF SOUTHERN
WISCONSIN, INC.

Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

Section A. Public Support

Calendar year (or fiscal year beginning in) ▶	(a) 2017	(b) 2018	(c) 2019	(d) 2020	(e) 2021	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")	6337752.	4137674.	3831457.	5599303.	6730279.	26636465.
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge						
4 Total. Add lines 1 through 3	6337752.	4137674.	3831457.	5599303.	6730279.	26636465.
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						1782336.
6 Public support. Subtract line 5 from line 4.						24854129.

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2017	(b) 2018	(c) 2019	(d) 2020	(e) 2021	(f) Total
7 Amounts from line 4	6337752.	4137674.	3831457.	5599303.	6730279.	26636465.
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources	1087597.	1391606.	1298613.	1259323.	1499594.	6536733.
9 Net income from unrelated business activities, whether or not the business is regularly carried on						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
11 Total support. Add lines 7 through 10						33173198.
12 Gross receipts from related activities, etc. (see instructions)					12	3,970,407.
13 First 5 years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here						<input type="checkbox"/>

Section C. Computation of Public Support Percentage

14 Public support percentage for 2021 (line 6, column (f), divided by line 11, column (f))	14	74.92	%
15 Public support percentage from 2020 Schedule A, Part II, line 14	15	76.83	%
16a 33 1/3% support test - 2021. If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization	<input checked="" type="checkbox"/>		
b 33 1/3% support test - 2020. If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization	<input type="checkbox"/>		
17a 10% -facts-and-circumstances test - 2021. If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and stop here. Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization	<input type="checkbox"/>		
b 10% -facts-and-circumstances test - 2020. If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and stop here. Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization	<input type="checkbox"/>		
18 Private foundation. If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions	<input type="checkbox"/>		

Part III Support Schedule for Organizations Described in Section 509(a)(2)

(Complete only if you checked the box on line 10 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

Section A. Public Support

Calendar year (or fiscal year beginning in) ►	(a) 2017	(b) 2018	(c) 2019	(d) 2020	(e) 2021	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5 The value of services or facilities furnished by a governmental unit to the organization without charge						
6 Total. Add lines 1 through 5						
7a Amounts included on lines 1, 2, and 3 received from disqualified persons						
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year						
c Add lines 7a and 7b						
8 Public support. (Subtract line 7c from line 6.)						

Section B. Total Support

Calendar year (or fiscal year beginning in) ►	(a) 2017	(b) 2018	(c) 2019	(d) 2020	(e) 2021	(f) Total
9 Amounts from line 6						
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
c Add lines 10a and 10b						
11 Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
13 Total support. (Add lines 9, 10c, 11, and 12.)						

14 First 5 years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here**

Section C. Computation of Public Support Percentage

15 Public support percentage for 2021 (line 8, column (f), divided by line 13, column (f))	15	%
16 Public support percentage from 2020 Schedule A, Part III, line 15	16	%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2021 (line 10c, column (f), divided by line 13, column (f))	17	%
18 Investment income percentage from 2020 Schedule A, Part III, line 17	18	%

19a 33 1/3% support tests - 2021. If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization

b 33 1/3% support tests - 2020. If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization

20 Private foundation. If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions

Part IV Supporting Organizations

(Complete only if you checked a box in line 12 on Part I. If you checked box 12a, Part I, complete Sections A and B. If you checked box 12b, Part I, complete Sections A and C. If you checked box 12c, Part I, complete Sections A, D, and E. If you checked box 12d, Part I, complete Sections A and D, and complete Part V.)

Section A. All Supporting Organizations

	Yes	No
1 Are all of the organization's supported organizations listed by name in the organization's governing documents? <i>If "No," describe in Part VI how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.</i>		
2 Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? <i>If "Yes," explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2).</i>		
3a Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? <i>If "Yes," answer lines 3b and 3c below.</i>		
b Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? <i>If "Yes," describe in Part VI when and how the organization made the determination.</i>		
c Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? <i>If "Yes," explain in Part VI what controls the organization put in place to ensure such use.</i>		
4a Was any supported organization not organized in the United States ("foreign supported organization")? <i>If "Yes," and if you checked box 12a or 12b in Part I, answer lines 4b and 4c below.</i>		
b Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? <i>If "Yes," describe in Part VI how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.</i>		
c Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? <i>If "Yes," explain in Part VI what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.</i>		
5a Did the organization add, substitute, or remove any supported organizations during the tax year? <i>If "Yes," answer lines 5b and 5c below (if applicable). Also, provide detail in Part VI, including (i) the names and EIN numbers of the supported organizations added, substituted, or removed; (ii) the reasons for each such action; (iii) the authority under the organization's organizing document authorizing such action; and (iv) how the action was accomplished (such as by amendment to the organizing document).</i>		
b Type I or Type II only. Was any added or substituted supported organization part of a class already designated in the organization's organizing document?		
c Substitutions only. Was the substitution the result of an event beyond the organization's control?		
6 Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? <i>If "Yes," provide detail in Part VI.</i>		
7 Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (as defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? <i>If "Yes," complete Part I of Schedule L (Form 990).</i>		
8 Did the organization make a loan to a disqualified person (as defined in section 4958) not described on line 7? <i>If "Yes," complete Part I of Schedule L (Form 990).</i>		
9a Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons, as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? <i>If "Yes," provide detail in Part VI.</i>		
b Did one or more disqualified persons (as defined on line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? <i>If "Yes," provide detail in Part VI.</i>		
c Did a disqualified person (as defined on line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? <i>If "Yes," provide detail in Part VI.</i>		
10a Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? <i>If "Yes," answer line 10b below.</i>		
b Did the organization have any excess business holdings in the tax year? <i>(Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)</i>		

Part IV Supporting Organizations (continued)

	Yes	No
11 Has the organization accepted a gift or contribution from any of the following persons?		
a A person who directly or indirectly controls, either alone or together with persons described on lines 11b and 11c below, the governing body of a supported organization?		
b A family member of a person described on line 11a above?		
c A 35% controlled entity of a person described on line 11a or 11b above? <i>If "Yes" to line 11a, 11b, or 11c, provide detail in Part VI.</i>		
11a		
11b		
11c		

Section B. Type I Supporting Organizations

	Yes	No
1 Did the governing body, members of the governing body, officers acting in their official capacity, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's officers, directors, or trustees at all times during the tax year? <i>If "No," describe in Part VI how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove officers, directors, or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.</i>		
2 Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? <i>If "Yes," explain in Part VI how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised, or controlled the supporting organization.</i>		
1		
2		

Section C. Type II Supporting Organizations

	Yes	No
1 Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? <i>If "No," describe in Part VI how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s).</i>		
1		

Section D. All Type III Supporting Organizations

	Yes	No
1 Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided?		
2 Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s) or (ii) serving on the governing body of a supported organization? <i>If "No," explain in Part VI how the organization maintained a close and continuous working relationship with the supported organization(s).</i>		
3 By reason of the relationship described on line 2, above, did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? <i>If "Yes," describe in Part VI the role the organization's supported organizations played in this regard.</i>		
1		
2		
3		

Section E. Type III Functionally Integrated Supporting Organizations

1 Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions).			
a <input type="checkbox"/> The organization satisfied the Activities Test. Complete line 2 below.			
b <input type="checkbox"/> The organization is the parent of each of its supported organizations. Complete line 3 below.			
c <input type="checkbox"/> The organization supported a governmental entity. Describe in Part VI how you supported a governmental entity (see instructions).			
2 Activities Test. Answer lines 2a and 2b below.			
a Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? <i>If "Yes," then in Part VI identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.</i>	Yes	No	
b Did the activities described on line 2a, above, constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? <i>If "Yes," explain in Part VI the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.</i>			
3 Parent of Supported Organizations. Answer lines 3a and 3b below.			
a Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? <i>If "Yes" or "No" provide details in Part VI.</i>			
b Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? <i>If "Yes," describe in Part VI the role played by the organization in this regard.</i>			
2a			
2b			
3a			
3b			

**COMMUNITY FOUNDATION OF SOUTHERN
WISCONSIN, INC.**

Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations

1 Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov. 20, 1970 (*explain in Part VI*). **See instructions.**
All other Type III non-functionally integrated supporting organizations must complete Sections A through E.

Section A - Adjusted Net Income	(A) Prior Year	(B) Current Year (optional)
1 Net short-term capital gain	1	
2 Recoveries of prior-year distributions	2	
3 Other gross income (see instructions)	3	
4 Add lines 1 through 3.	4	
5 Depreciation and depletion	5	
6 Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions)	6	
7 Other expenses (see instructions)	7	
8 Adjusted Net Income (subtract lines 5, 6, and 7 from line 4)	8	

Section B - Minimum Asset Amount	(A) Prior Year	(B) Current Year (optional)
1 Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):		
a Average monthly value of securities	1a	
b Average monthly cash balances	1b	
c Fair market value of other non-exempt-use assets	1c	
d Total (add lines 1a, 1b, and 1c)	1d	
e Discount claimed for blockage or other factors (<i>explain in detail in Part VI</i>):		
2 Acquisition indebtedness applicable to non-exempt-use assets	2	
3 Subtract line 2 from line 1d.	3	
4 Cash deemed held for exempt use. Enter 0.015 of line 3 (for greater amount, see instructions).	4	
5 Net value of non-exempt-use assets (subtract line 4 from line 3)	5	
6 Multiply line 5 by 0.035.	6	
7 Recoveries of prior-year distributions	7	
8 Minimum Asset Amount (add line 7 to line 6)	8	

Section C - Distributable Amount	(A) Prior Year	(B) Current Year (optional)
1 Adjusted net income for prior year (from Section A, line 8, column A)	1	Current Year
2 Enter 0.85 of line 1.	2	
3 Minimum asset amount for prior year (from Section B, line 8, column A)	3	
4 Enter greater of line 2 or line 3.	4	
5 Income tax imposed in prior year	5	
6 Distributable Amount. Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions).	6	
7 <input type="checkbox"/> Check here if the current year is the organization's first as a non-functionally integrated Type III supporting organization (see instructions).		

COMMUNITY FOUNDATION OF SOUTHERN
WISCONSIN, INC.

Schedule A (Form 990) 2021

39-1711388 Page 7

Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations (continued)

Section D - Distributions	Current Year
1 Amounts paid to supported organizations to accomplish exempt purposes	1
2 Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	2
3 Administrative expenses paid to accomplish exempt purposes of supported organizations	3
4 Amounts paid to acquire exempt-use assets	4
5 Qualified set-aside amounts (prior IRS approval required - <i>provide details in Part VI</i>)	5
6 Other distributions (<i>describe in Part VI</i>). See instructions.	6
7 Total annual distributions. Add lines 1 through 6.	7
8 Distributions to attentive supported organizations to which the organization is responsive (<i>provide details in Part VI</i>). See instructions.	8
9 Distributable amount for 2021 from Section C, line 6	9
10 Line 8 amount divided by line 9 amount	10

Section E - Distribution Allocations (see instructions)	(i) Excess Distributions	(ii) Underdistributions Pre-2021	(iii) Distributable Amount for 2021
1 Distributable amount for 2021 from Section C, line 6			
2 Underdistributions, if any, for years prior to 2021 (reasonable cause required - <i>explain in Part VI</i>). See instructions.			
3 Excess distributions carryover, if any, to 2021			
a From 2016			
b From 2017			
c From 2018			
d From 2019			
e From 2020			
f Total of lines 3a through 3e			
g Applied to underdistributions of prior years			
h Applied to 2021 distributable amount			
i Carryover from 2016 not applied (see instructions)			
j Remainder. Subtract lines 3g, 3h, and 3i from line 3f.			
4 Distributions for 2021 from Section D, line 7: \$			
a Applied to underdistributions of prior years			
b Applied to 2021 distributable amount			
c Remainder. Subtract lines 4a and 4b from line 4.			
5 Remaining underdistributions for years prior to 2021, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, <i>explain in Part VI</i> . See instructions.			
6 Remaining underdistributions for 2021. Subtract lines 3h and 4b from line 1. For result greater than zero, <i>explain in Part VI</i> . See instructions.			
7 Excess distributions carryover to 2022. Add lines 3j and 4c.			
8 Breakdown of line 7:			
a Excess from 2017			
b Excess from 2018			
c Excess from 2019			
d Excess from 2020			
e Excess from 2021			

Schedule A (Form 990) 2021

Schedule B
(Form 990)

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ Attach to Form 990 or Form 990-PF.
▶ Go to www.irs.gov/Form990 for the latest information.

OMB No. 1545-0047

2021

Name of the organization

**COMMUNITY FOUNDATION OF SOUTHERN
WISCONSIN, INC.**

Employer identification number

39-1711388

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

501(c)(3) (enter number) organization

4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

527 political organization

Form 990-PF

501(c)(3) exempt private foundation

4947(a)(1) nonexempt charitable trust treated as a private foundation

501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** \$5,000; or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h; or (ii) Form 990-EZ, line 1. Complete Parts I and II.

For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 exclusively for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I (entering "N/A" in column (b) instead of the contributor name and address), II, and III.

For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year ▶ \$ _____

Caution: An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990).

Name of organization COMMUNITY FOUNDATION OF SOUTHERN WISCONSIN, INC.	Employer identification number 39-1711388
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Part I Contributors (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
<u>1</u>	<hr/> <hr/> <hr/>	\$ <u>500,165.</u>	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
<u>2</u>	<hr/> <hr/> <hr/>	\$ <u>1,322,850.</u>	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
<u>3</u>	<hr/> <hr/> <hr/>	\$ <u>227,837.</u>	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
<u>4</u>	<hr/> <hr/> <hr/>	\$ <u>939,361.</u>	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
<u>5</u>	<hr/> <hr/> <hr/>	\$ <u>250,000.</u>	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
<u>6</u>	<hr/> <hr/> <hr/>	\$ <u>200,000.</u>	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization COMMUNITY FOUNDATION OF SOUTHERN WISCONSIN, INC.	Employer identification number 39-1711388
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Part II Noncash Property (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
	_____ _____ _____	\$ _____	_____
	_____ _____ _____	\$ _____	_____
	_____ _____ _____	\$ _____	_____
	_____ _____ _____	\$ _____	_____
	_____ _____ _____	\$ _____	_____
	_____ _____ _____	\$ _____	_____
	_____ _____ _____	\$ _____	_____

Name of organization COMMUNITY FOUNDATION OF SOUTHERN WISCONSIN, INC.	Employer identification number 39-1711388
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Part III Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of **\$1,000 or less** for the year. (Enter this info. once.) ▶ \$ _____
Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
(e) Transfer of gift			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	
(e) Transfer of gift			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	
(e) Transfer of gift			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	
(e) Transfer of gift			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	
(e) Transfer of gift			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	

SCHEDULE D
(Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Financial Statements

▶ **Complete if the organization answered "Yes" on Form 990, Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.**
▶ **Attach to Form 990.**

▶ **Go to www.irs.gov/Form990 for instructions and the latest information.**

OMB No. 1545-0047

2021

Open to Public Inspection

Name of the organization **COMMUNITY FOUNDATION OF SOUTHERN WISCONSIN, INC.** **Employer identification number** **39-1711388**

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts. Complete if the organization answered "Yes" on Form 990, Part IV, line 6.

	(a) Donor advised funds	(b) Funds and other accounts
1 Total number at end of year	76	31
2 Aggregate value of contributions to (during year)	455,717.	116,507.
3 Aggregate value of grants from (during year)	703,550.	135,700.
4 Aggregate value at end of year	8,047,970.	2,838,675.
5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	

Part II Conservation Easements. Complete if the organization answered "Yes" on Form 990, Part IV, line 7.

1 Purpose(s) of conservation easements held by the organization (check all that apply).
 Preservation of land for public use (for example, recreation or education) Preservation of a historically important land area
 Protection of natural habitat Preservation of a certified historic structure
 Preservation of open space

2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year.

	Held at the End of the Tax Year
a Total number of conservation easements	2a
b Total acreage restricted by conservation easements	2b
c Number of conservation easements on a certified historic structure included in (a)	2c
d Number of conservation easements included in (c) acquired after 7/25/06, and not on a historic structure listed in the National Register	2d

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year ▶ _____

4 Number of states where property subject to conservation easement is located ▶ _____

5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds?

6 Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year ▶ _____

7 Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year ▶ \$ _____

8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)?

9 In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements.

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.

Complete if the organization answered "Yes" on Form 990, Part IV, line 8.

1a If the organization elected, as permitted under FASB ASC 958, not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide in Part XIII the text of the footnote to its financial statements that describes these items.

b If the organization elected, as permitted under FASB ASC 958, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items:

(i) Revenue included on Form 990, Part VIII, line 1

(ii) Assets included in Form 990, Part X

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under FASB ASC 958 relating to these items:

a Revenue included on Form 990, Part VIII, line 1

b Assets included in Form 990, Part X

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule D (Form 990) 2021

**COMMUNITY FOUNDATION OF SOUTHERN
WISCONSIN, INC.**

Schedule D (Form 990) 2021

39-1711388 Page 2

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets *(continued)*

- 3** Using the organization's acquisition, accession, and other records, check any of the following that make significant use of its collection items (check all that apply):
- | | |
|---|--|
| a <input type="checkbox"/> Public exhibition | d <input type="checkbox"/> Loan or exchange program |
| b <input type="checkbox"/> Scholarly research | e <input type="checkbox"/> Other _____ |
| c <input type="checkbox"/> Preservation for future generations | |
- 4** Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.
- 5** During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? Yes No

Part IV Escrow and Custodial Arrangements. Complete if the organization answered "Yes" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

- 1a** Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X? Yes No
- b** If "Yes," explain the arrangement in Part XIII and complete the following table:
- | | Amount |
|--|-----------|
| c Beginning balance | 1c |
| d Additions during the year | 1d |
| e Distributions during the year | 1e |
| f Ending balance | 1f |
- 2a** Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability? Yes No
- b** If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided on Part XIII

Part V Endowment Funds. Complete if the organization answered "Yes" on Form 990, Part IV, line 10.

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a Beginning of year balance					
b Contributions					
c Net investment earnings, gains, and losses					
d Grants or scholarships					
e Other expenditures for facilities and programs					
f Administrative expenses					
g End of year balance					

- 2** Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:
- a** Board designated or quasi-endowment _____ %
- b** Permanent endowment _____ %
- c** Term endowment _____ %
- The percentages on lines 2a, 2b, and 2c should equal 100%.
- 3a** Are there endowment funds not in the possession of the organization that are held and administered for the organization by:
- | | Yes | No |
|--|---------------|----|
| (i) Unrelated organizations | 3a(i) | |
| (ii) Related organizations | 3a(ii) | |
| b If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R? <input type="checkbox"/> | 3b | |
- 4** Describe in Part XIII the intended uses of the organization's endowment funds.

Part VI Land, Buildings, and Equipment.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land				
b Buildings				
c Leasehold improvements				
d Equipment		8,050.	3,354.	4,696.
e Other				

Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10c.) 4,696.

Schedule D (Form 990) 2021

**COMMUNITY FOUNDATION OF SOUTHERN
WISCONSIN, INC.**

Schedule D (Form 990) 2021

39-1711388 Page **3**

Part VII Investments - Other Securities.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11b. See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) Financial derivatives		
(2) Closely held equity interests		
(3) Other		
(A) POOLED INVESTMENT FUNDS	71,441,812.	END-OF-YEAR MARKET VALUE
(B)		
(C)		
(D)		
(E)		
(F)		
(G)		
(H)		
Total. (Col. (b) must equal Form 990, Part X, col. (B) line 12.) ▶	71,441,812.	

Part VIII Investments - Program Related.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

(a) Description of investment	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1)		
(2)		
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
Total. (Col. (b) must equal Form 990, Part X, col. (B) line 13.) ▶		

Part IX Other Assets.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11d. See Form 990, Part X, line 15.

(a) Description	(b) Book value
(1)	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. (Column (b) must equal Form 990, Part X, col. (B) line 15.) ▶	

Part X Other Liabilities.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25.

1. (a) Description of liability	(b) Book value
(1) Federal income taxes	
(2) LIABILITY TO LIFE BENEFICIARY	4,788.
(3) DISCOUNT FOR FUTURE INTEREST	45,264.
(4) FUNDS HELD FOR BENEFIT OF OTHERS	3,497,245.
(5)	
(6)	
(7)	
(8)	
(9)	
Total. (Column (b) must equal Form 990, Part X, col. (B) line 25.) ▶	3,547,297.

2. Liability for uncertain tax positions. In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FASB ASC 740. Check here if the text of the footnote has been provided in Part XIII ...

Schedule D (Form 990) 2021

COMMUNITY FOUNDATION OF SOUTHERN
WISCONSIN, INC.

Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return.

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

1	Total revenue, gains, and other support per audited financial statements	1	-1,597,657.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:		
a	Net unrealized gains (losses) on investments	2a	-14,288,339.
b	Donated services and use of facilities	2b	
c	Recoveries of prior year grants	2c	
d	Other (Describe in Part XIII.)	2d	-206,780.
e	Add lines 2a through 2d	2e	-14,495,119.
3	Subtract line 2e from line 1	3	12,897,462.
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIII.)	4b	-30,945.
c	Add lines 4a and 4b	4c	-30,945.
5	Total revenue. Add lines 3 and 4c . (This must equal Form 990, Part I, line 12.)	5	12,866,517.

Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return.

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

1	Total expenses and losses per audited financial statements	1	4,432,391.
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:		
a	Donated services and use of facilities	2a	
b	Prior year adjustments	2b	
c	Other losses	2c	
d	Other (Describe in Part XIII.)	2d	-140,390.
e	Add lines 2a through 2d	2e	-140,390.
3	Subtract line 2e from line 1	3	4,572,781.
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	320,466.
b	Other (Describe in Part XIII.)	4b	
c	Add lines 4a and 4b	4c	320,466.
5	Total expenses. Add lines 3 and 4c . (This must equal Form 990, Part I, line 18.)	5	4,893,247.

Part XIII Supplemental Information.

Provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

PART XI, LINE 2D - OTHER ADJUSTMENTS:

NET INVESTMENT ACTIVITY IN FUNDS HELD FOR OTHER

ORGANIZATIONS	482,272.
CONTRIBUTIONS FROM FUNDS HELD FOR OTHERS	-368,586.
INVESTMENT FEES	-320,466.
TOTAL TO SCHEDULE D, PART XI, LINE 2D	-206,780.

PART XI, LINE 4B - OTHER ADJUSTMENTS:

FUNDRAISING EXPENSES REPORTED ON PART VIII, LINE 8B	-30,945.
---	----------

PART XII, LINE 2D - OTHER ADJUSTMENTS:

Part XIII Supplemental Information *(continued)*

FUNDRAISING EXPENSES REPORTED ON PART VIII, LINE 8B 30,945.

EXPENSES IN FUNDS HELD FOR OTHER ORGANIZATIONS -171,335.

TOTAL TO SCHEDULE D, PART XII, LINE 2D -140,390.

Multiple horizontal lines for supplemental information.

**COMMUNITY FOUNDATION OF SOUTHERN
WISCONSIN, INC.**

Part II Fundraising Events. Complete if the organization answered "Yes" on Form 990, Part IV, line 18, or reported more than \$15,000 of fundraising event contributions and gross income on Form 990-EZ, lines 1 and 6b. List events with gross receipts greater than \$5,000.

		(a) Event #1	(b) Event #2	(c) Other events	(d) Total events (add col. (a) through col. (c))	
		MONSIGNOR THOMAS F CAM (event type)	TEAM MATHIAS FUND (event type)	2 (total number)		
Revenue	1	Gross receipts	42,910.	15,376.	15,902.	74,188.
	2	Less: Contributions	17,525.	7,050.	10,442.	35,017.
	3	Gross income (line 1 minus line 2)	25,385.	8,326.	5,460.	39,171.
Direct Expenses	4	Cash prizes	2,943.			2,943.
	5	Noncash prizes			251.	251.
	6	Rent/facility costs	750.		336.	1,086.
	7	Food and beverages	8,249.		1,552.	9,801.
	8	Entertainment				
	9	Other direct expenses	2,948.	4,450.	906.	8,304.
	10	Direct expense summary. Add lines 4 through 9 in column (d)				22,385.
11	Net income summary. Subtract line 10 from line 3, column (d)				16,786.	

Part III Gaming. Complete if the organization answered "Yes" on Form 990, Part IV, line 19, or reported more than \$15,000 on Form 990-EZ, line 6a.

		(a) Bingo	(b) Pull tabs/instant bingo/progressive bingo	(c) Other gaming	(d) Total gaming (add col. (a) through col. (c))
Revenue	1	Gross revenue			
	2	Cash prizes			
Direct Expenses	3	Noncash prizes			
	4	Rent/facility costs			
	5	Other direct expenses			
6	Volunteer labor	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	
7	Direct expense summary. Add lines 2 through 5 in column (d)				
8	Net gaming income summary. Subtract line 7 from line 1, column (d)				

9 Enter the state(s) in which the organization conducts gaming activities: _____

a Is the organization licensed to conduct gaming activities in each of these states? Yes No

b If "No," explain: _____

10a Were any of the organization's gaming licenses revoked, suspended, or terminated during the tax year? Yes No

b If "Yes," explain: _____

COMMUNITY FOUNDATION OF SOUTHERN WISCONSIN, INC.

- 11 Does the organization conduct gaming activities with nonmembers?
12 Is the organization a grantor, beneficiary or trustee of a trust, or a member of a partnership or other entity formed to administer charitable gaming?
13 Indicate the percentage of gaming activity conducted in:
a The organization's facility
b An outside facility
14 Enter the name and address of the person who prepares the organization's gaming/special events books and records:

Name

Address

- 15a Does the organization have a contract with a third party from whom the organization receives gaming revenue?
b If "Yes," enter the amount of gaming revenue received by the organization and the amount of gaming revenue retained by the third party
c If "Yes," enter name and address of the third party:

Name

Address

16 Gaming manager information:

Name

Gaming manager compensation \$

Description of services provided

- Director/officer Employee Independent contractor

17 Mandatory distributions:

- a Is the organization required under state law to make charitable distributions from the gaming proceeds to retain the state gaming license?
b Enter the amount of distributions required under state law to be distributed to other exempt organizations or spent in the organization's own exempt activities during the tax year \$

Part IV Supplemental Information. Provide the explanations required by Part I, line 2b, columns (iii) and (v); and Part III, lines 9, 9b, 10b, 15b, 15c, 16, and 17b, as applicable. Also provide any additional information. See instructions.

Multiple horizontal lines for supplemental information input.

**SCHEDULE I
(Form 990)**

Department of the Treasury
Internal Revenue Service

**Grants and Other Assistance to Organizations,
Governments, and Individuals in the United States**
Complete if the organization answered "Yes" on Form 990, Part IV, line 21 or 22.

▶ **Attach to Form 990.**

▶ **Go to www.irs.gov/Form990 for the latest information.**

OMB No. 1545-0047

2021

**Open to Public
Inspection**

Name of the organization **COMMUNITY FOUNDATION OF SOUTHERN
WISCONSIN, INC.**

**Employer identification number
39-1711388**

Part I General Information on Grants and Assistance

- 1** Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? **Yes** **No**
- 2** Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States.

Part II Grants and Other Assistance to Domestic Organizations and Domestic Governments. Complete if the organization answered "Yes" on Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Part II can be duplicated if additional space is needed.

1 (a) Name and address of organization or government	(b) EIN	(c) IRC section (if applicable)	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of noncash assistance	(h) Purpose of grant or assistance
AGRACE HOSPICE & PALLIATIVE CARE 2901 N WRIGHT ROAD JANESVILLE, WI 53546	39-1319537	GOVERNMENT	23,935.	0.			INPATIENT UNIT AND GENERAL SUPPORT
ARGYLE SCHOOL DISTRICT 14665 HWY 78, PO BOX 256 ARGYLE, WI 53504	39-6000727	SCHOOL	17,588.	0.			DOCUMENT CAMERA, PORTABLE PA SYSTEM, CHROMEBOOKS AND CART, IRTUAL LEARNING HEADSETS
BEHRING SENIOR CENTER OF MONROE 1113 10TH ST MONROE, WI 53566	39-6005538	GOVERNMENT	5,968.	0.			GENERAL SUPPORT
BEYOND BORDERS, INC. PO BOX 2132 NORRISTOWN, PA 19404	23-2713126	501(C)(3)	10,000.	0.			GENERAL SUPPORT AND LEADERSHIP CIRCLE
BLACKHAWK VOCATIONAL TECHNICAL DISTRICT EDUCATIONAL FOUNDATION - 6004 S COUNTY ROAD G, PO BOX 5009 - JANESVILLE, WI 53547-5009	39-1391659	SCHOOL	8,000.	0.			SCHOLARSHIPS AND NON-TRADITIONAL ASSISTANCE
BOYS & GIRLS CLUB OF JANESVILLE 200 W COURT ST JANESVILLE, WI 53547	39-1645796	501(C)(3)	20,500.	0.			SPONSOR KIDS, GENERAL SUPPORT

- 2** Enter total number of section 501(c)(3) and government organizations listed in the line 1 table ▶ **56.**
- 3** Enter total number of other organizations listed in the line 1 table ▶ **22.**

LHA **For Paperwork Reduction Act Notice, see the Instructions for Form 990.**

Schedule I (Form 990) 2021

SEE PART IV FOR COLUMN (H) DESCRIPTIONS

**COMMUNITY FOUNDATION OF SOUTHERN
WISCONSIN, INC.**

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Part II Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments (Schedule I (Form 990), Part II.)

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
CAMP MANITO-WISH YMCA, INC. PO BOX 246 BOULDER JUNCTION, WI 54512-0246	39-1136315	501(C)(3)	25,000.	0.			GENERAL SUPPORT
CHICAGO ADVENTURE THERAPY PO BOX 13062 CHICAGO, IL 60613	42-1714477	501(C)(3)	20,500.	0.			TRANSPORTATION VEHICLE/EQUIPMENT
CITY OF EVANSVILLE 31 S MADISON STREET, P O BOX 529 EVANSVILLE, WI 53536-1399	39-6005445	GOVERNMENT	7,000.	0.			GENERAL SUPPORT
CITY OF LANCASTER 206 S. MADISON STREET LANCASTER, WI 53813	39-6005501	GOVERNMENT	30,350.	0.			BATH HOUSE, BAKETBALL COURT, WARMING HOUSE, AND PICNIC SHELTER IMPROVEMENTS, RADAR SPEED
CITY OF MONROE 1110 18TH AVE MONROE, WI 53566	39-6005538	GOVERNMENT	55,131.	0.			BALLFIELD RENOVATION, AIR SCRUBBERS, SPACE STUDY/DESIGN WORK FOR PROPOSED NEW SENIOR
CITY OF MONROE PARKS & RECREATION DEPARTMENT - 1110 18TH AVENUE - MONROE, WI 53566	39-6005538	GOVERNMENT	23,539.	0.			FIREWORKS CELEBRATION SUPPORT, SPLASH PAD CONSTRUCTION, SCHOLARSHIP SUPPORT, SPECIAL NEEDS
CITY OF PLATTEVILLE 75 N BONSON STREET, PO BOX 780 PLATTEVILLE, WI 53818	39-6005569	GOVERNMENT	50,119.	0.			PICKELBALL COURTS, TENT RENTAL, ANIMAL CARE SUPPORT
CITY OF SHULLSBURG 190 N JUDGEMENT ST, PO BOX 580 SHULLSBURG, WI 53586	39-6005605	GOVERNMENT	13,413.	0.			GENERAL SUPPORT
COMMUNITY ACTION, INC. OF ROCK AND WALWORTH COUNTIES - 20 ECLIPSE CENTER - BELOIT, WI 53511	39-1052077	501(C)(3)	18,050.	0.			PERSONAL RESPONSIBILITY EDUCATION, FATHERHOOD INITIATIVE, SKILLS ENHANCEMENT PROGRAM,

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COMMUNITY FOUNDATION OF SOUTHERN
WISCONSIN, INC.

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Part II Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments (Schedule I (Form 990), Part II.)

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
DARLINGTON COMMUNITY SCHOOL DISTRICT - 11630 CENTER HILL RD - DARLINGTON, WI 53530	39-6001618	SCHOOL	8,708.	0.			AMERICAN PLAYERS FIELD TRIP, MUSIC TRIP, BOOK-A-MONTH PROGRAM, MOTIVATIONAL SPEAKER
ECHO, INC. 65 S HIGH STREET JANESVILLE, WI 53548	39-1222279	501(C)(3)	11,036.	0.			GENERAL SUPPORT
FELLOW MORTALS, INC. W4632 PALMER ROAD LAKE GENEVA, WI 53147	39-1694862	501(C)(3)	9,481.	0.			GENERAL SUPPORT
FOUNDATION FOR THE PRESERVATION OF 108 S. JACKSON (FP108SJ) - 108 S JACKSON STREET - JANESVILLE, WI 53548-3843	39-1824893	501(C)(3)	5,364.	0.			JWCA INSURANCE REIMBURSEMENTS
FRIENDS OF OUR GALLERY D/B/A ROUNTREE GALLERY - 120 W. MAIN STREET - PLATTEVILLE, WI 53818	45-0576033	501(C)(3)	6,274.	0.			EXTERIOR SIGNAGE, LIGHTING, SECURITY, REGIONAL ART EXHIBIT ASSISTANCE
GENERAL FEDERATION OF WOMENS CLUB C/O MONICA SCHNEIDER 1117 23RD STRE MONROE, WI 53566	23-7426828	501(C)(3)	50,000.	0.			CHRISTMAS STOCKING PROJECT-CARE PACKAGES, FOOD BOXES, ELDERLY CHEER PACKAGES
GOD IS FAITHFUL TEMPORARY SHELTER 1025 NORTH WASHINGTON STREET JANESVILLE, WI 53547-0788	26-1452370	501(C)(3)	15,100.	0.			GENERAL SUPPORT
GOOD SHEPHERD LUTHERAN CHURCH 118 E MASON STREET LENA, IL 61048	36-2592109	CHURCH	15,000.	0.			GENERAL SUPPORT
GRANT COUNTY HISTORICAL SOCIETY 129 E. MAPLE STREET LANCASTER, WI 53813	39-6076413	501(C)(3)	18,003.	0.			STONE COTTAGE SIGNAGE, REPAIRS/PRESERVATION, TREES; CAR BOOK AND EVENT

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(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
GRANT REGIONAL HEALTH CENTER FOUNDATION INC - 507 S MONROE ST. - LANCASTER, WI 53813	39-1834962	501(C)(3)	6,995.	0.			GENERAL SUPPORT
GREEN COUNTY FAMILY YMCA, INC. 1307 2ND STREET MONROE, WI 53566	39-1405623	501(C)(3)	9,554.	0.			PROGRAMS AND GENERAL SUPPORT, FITNESS EXERCISE MATS
HEALTHNET OF ROCK COUNTY INC. 113 S FRANKLIN ST. JANESVILLE, WI 53548	39-1778804	501(C)(3)	187,943.	0.			CAPITAL CAMPAIGN-BUILDING FUND, GENERAL SUPPORT, SEAL-A-SMILE PROJECT
HOUSE OF MERCY 320 LINCOLN ST JANESVILLE, WI 53548	39-0816848	501(C)(3)	6,800.	0.			GENERAL SUPPORT
HUMANE SOCIETY OF SOUTHERN WISCONSIN - 4700 S COUNTY RD G - JANESVILLE, WI 53546	39-0973879	501(C)(3)	71,895.	0.			BUILDING CAMPAIGN; SPAYING AND NEUTERING COSTS
INSPIRING COMMUNITY INC 190 MARKET STREET, P O BOX 503 PLATTEVILLE, WI 53818	82-2002935	501(C)(3)	10,644.	0.			IMPROVING ACOUSTICS AT THE BROSKE CENTER
JAMISON MUSEUM ASSOCIATION, INC. 405 E MAIN STREET, PO BOX 780 PLATTEVILLE, WI 53818	39-1363989	501(C)(3)	8,052.	0.			ADVANCING ARCHIVAL PRESERVATION, HISTORIC RE-ENACTMENT SUPPORT, EDUCATIONAL PROGRAMMING
JANESVILLE YOUTH BASEBALL AND SOFTBALL ASSOCIATION, INC. - 100 SOUTH WUTHERING HILLS DRIVE - JANESVILLE, WI 53546	39-6075557	501(C)(3)	15,000.	0.			GENERAL SUPPORT
JOHN WAYNE BIRTHPLACE SOCIETY, LTD. - 205 S. JOHN WAYNE DR. - WINTERSSET, IA 50273	42-1207533	501(C)(3)	50,000.	0.			GENERAL SUPPORT

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Part II Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments (Schedule I (Form 990), Part II.)

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
LANCASTER COMMUNITY SCHOOLS 231 N SHERIDAN ST LANCASTER, WI 53813	39-6002918	SCHOOL	59,319.	0.			FITNESS AND READING PROGRAMS
LANCASTER EMS, INC. 312 N WASHINGTON ST, PO BOX 293 LANCASTER, WI 53813	39-1506051	501(C)(3)	20,139.	0.			EMS REFLECTIVE PROTECTIVE COATS
MAPLE STREET KIDS DAYCARE CENTER, INC. - 925 W. MAPLE ST - LANCASTER, WI 53813	39-1791960	501(C)(3)	6,544.	0.			SLEEP COTS REPLACEMENT, DAYCARE RELOCATION
MILTON COLLEGE PRESERVATION SOCIETY, INC - 513 COLLEGE STREET, PO BOX 84 - MILTON, WI 53563	39-1482178	501(C)(3)	6,161.	0.			GENERAL SUPPORT
MONROE ARTS CENTER, INC 1315 11TH STREET, PO BOX 472 MONROE, WI 53566-0472	39-1209502	501(C)(3)	40,088.	0.			CONCERT HALL ROOF REPAIR, CHILDREN'S PROGRAMS, GENERAL SUPPORT
MONROE CLINIC AND HOSPITAL FOUNDATION - 515 22ND AVENUE - MONROE, WI 53566	20-5769038	501(C)(3)	5,432.	0.			HOSPICE AND GENERAL SUPPORT, REACH OUT AND READ FUND
MONROE PUBLIC LIBRARY 925 16TH AVE MONROE, WI 53566	39-6003491	GOVERNMENT	16,797.	0.			CAPITAL CAMPAIGN SUPPORT FOR RENOVATION, BOOKS, GENERAL SUPPORT
NEW GLARUS SCHOOL DISTRICT 1701 2ND STREET, PO BOX 7 NEW GLARUS, WI 53574	39-6003657	SCHOOL	9,187.	0.			PROGRAMMING SUPPORT
NORTH CRAWFORD SCHOOL DISTRICT 47050 COUNTY ROAD X SOLDIERS GROVE, WI 54655	39-6002176	SCHOOL	9,016.	0.			MATH, LITERACY, AND PHYSICAL EDUCATION PROGRAMS

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COMMUNITY FOUNDATION OF SOUTHERN
WISCONSIN, INC.

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Part II Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments (Schedule I (Form 990), Part II.)

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
PARKVIEW SCHOOL DISTRICT 106 W CHURCH STREET, P O BOX 250 ORFORDVILLE, WI 53576	39-6022258	SCHOOL	22,823.	0.			SNOWSHOES, CODING PROGRAM, PE EQUIPMENT, LIGHTBOXES FOR ART CLASSES, LMC READING
PECATONICA AREA SCHOOL DISTRICT 704 CROSS STREET, PO BOX 117 BLANCHARDVILLE, WI 53516	39-6000997	SCHOOL	12,518.	0.			GENERAL SUPPORT
PLATTEVILLE CHORALE, INC C/O MARY SIECKMAN 6725 N ELM ST, PO BOX 344 - PLATTEVILLE, WI 53818-1849	36-4272029	501(C)(3)	5,500.	0.			AIR PURIFICATION FOR PLATTEVILLE CHORALE AND PLATTEVILLE CHILDREN'S CHOIR REHEARSAL SPACES
PLATTEVILLE LIBRARY FOUNDATION INC. - 225 W MAIN STREET, PO BOX 358 - PLATTEVILLE, WI 53818	39-1262931	501(C)(3)	7,723.	0.			LIBRARY OUTREACH SUPPORT, READING MATERIALS
PLATTEVILLE SCHOOL DISTRICT 780 N SECOND STREET PLATTEVILLE, WI 53818	36-6003910	SCHOOL	8,857.	0.			GENERAL SUPPORT
PLEASANT VIEW NURSING HOME OF GREEN COUNTY - N3150 WI 81 - MONROE, WI 53566-0768	39-6005699	GOVERNMENT	32,170.	0.			LANDSCAPING & GARDEN IMPROVEMENTS; DAY ROOM RENOVATIONS, OUTDOOR LIGHTING, WHEELCHAIR
PREGNANCY HELPLINE AND RESOURCE CENTER - 21 S JACKSON ST, SUITE C, PO BOX 383 - JANESVILLE, WI 53548-0383	39-1443280	501(C)(3)	6,500.	0.			GENERAL SUPPORT
PROJECT 1649 INC 2911 CARROUSEL LANE JANESVILLE, WI 53545	46-2161843	501(C)(3)	9,250.	0.			PROGRAM SUPORT FOR HOMELESS HIGH SCHOOL STUDENTS
ROCK COUNTY HISTORICAL SOCIETY 426 N JACKSON STREET JANESVILLE, WI 53548	39-0825331	501(C)(3)	8,800.	0.			SPONSOR LINCOLN BEDROOM, GENERAL SUPPORT

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Part II Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments (Schedule I (Form 990), Part II.)

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
ROCK PRAIRIE MONTESSORI, INC. 5246 E ROTAMER ROAD JANESVILLE, WI 53546	39-1782889	501(C)(3)	25,297.	0.			OPERATIONS, TUITION ASSISTANCE, AND GENERAL SUPPORT
ROCK PRAIRIE UNITED PRESBYTERIAN CHURCH - 8605 E COUNTY RD A - JANESVILLE, WI 53546-9246	39-1231298	CHURCH	10,000.	0.			PARKING LOT AND GENERAL SUPPORT
ROTARY BOTANICAL GARDENS 1455 PALMER DR JANESVILLE, WI 53545	39-1775351	501(C)(3)	11,249.	0.			ROTARY BOTANICAL GARDENTS SUPPORT, GENERAL SUPPORT
SAINT CLEMENT SCHOOL 330 W. MAPLE ST LANCASTER, WI 53813	39-0826120	SCHOOL	8,010.	0.			GENERAL SUPPORT
SAINT JOHN'S UNITED CHURCH OF CHRIST - 1724 14TH STREET - MONROE, WI 53566	39-0841801	CHURCH	6,435.	0.			GENERAL SUPPORT
SCHOOL DISTRICT OF EDGERTON 200 ELM HIGH DRIVE EDGERTON, WI 53534	39-6020036	SCHOOL	15,560.	0.			RAISED GARDEN BEDS, READING PROGRAMS, COLLEGE CAMPUS TOURS
SCHOOL DISTRICT OF HILLSBORO 777 SCHOOL AVENUE, PO BOX 526 HILLSBORO, WI 54634	39-6002591	SCHOOL	5,374.	0.			WHITEBOARDS, STANDING DESKS, CLASSROOM BULLETIN BOARDS, MATH AND LITERACY PROGRAM SUPPORT, ONLINE
SCHOOL DISTRICT OF JANESVILLE EDUCATION SERVICES CENTER 527 S FRANKLIN STREET - JANESVILLE, WI 53548-4823	39-6002726	CHURCH	23,024.	0.			PROGRAM SUPPORT, WASHINGTON SEMINAR FOR STUDENTS, READING PROGRAM SUPPORT
SCHOOL DISTRICT OF MILTON 448 E HIGH ST MILTON, WI 53563	39-6031414	CHURCH	8,502.	0.			GENERAL SUPPORT

Schedule I (Form 990)

COMMUNITY FOUNDATION OF SOUTHERN
WISCONSIN, INC.

Schedule I (Form 990)

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Part II Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments (Schedule I (Form 990), Part II.)

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
SCHOOL DISTRICT OF MONROE 925 16TH AVENUE, SUITE 3 MONROE, WI 53566	39-6003491	SCHOOL	59,325.	0.			TABLE SAW ADDITIONAL, STUDENT ACTIVITIES, PODCASTING AND BROADCASTING EQUIPMENT
SHULLSBURG SCHOOL DISTRICT 444 N JUDGEMENT ST WISCONSIN, WI 53586	39-6004487	SCHOOL	9,823.	0.			GENERAL SUPPORT
SOUTHWESTERN WISCONSIN COMMUNITY ACTION PROGRAM - 149 N IOWA ST - DODGEVILLE, WI 53533	39-1053511	501(C)(3)	6,050.	0.			FEEDING THE HUNGRY AND FOOD FOR KIDS PROGRAMS SUPPORT
START, INC. SCHOLARSHIPS FOR TECHNICAL AND RECOGNIZED TRAINING - PO BOX 1634 - JANESVILLE, WI 53547-1634	26-2909505	501(C)(3)	8,000.	0.			SCHOLARSHIPS AND GENERAL SUPPORT
ST. JOHN VIANNEY CATHOLIC CHURCH 1245 CLARK STREET JANESVILLE, WI 53545	39-0927293	CHURCH	17,201.	0.			ORGAN MAINTENANCE, GENERAL SUPPORT
ST. WILLIAM CATHOLIC CHURCH 445 N ARCH ST JANESVILLE, WI 53548	39-0928474	CHURCH	9,100.	0.			GENERAL SUPPORT
THE ARC - GREEN COUNTY 604 26TH AVE MONROE, WI 53566	39-6066041	501(C)(3)	16,751.	0.			GENERAL SUPPORT
THE GATHERING PLACE OF MILTON, INC. - 715 CAMPUS STREET - MILTON, WI 53563	39-1699315	501(C)(3)	31,000.	0.			CONCERTS ON THE LAWN, GATHERING GREEN
TURNER HALL OF MONROE, INC. PO BOX 762, 1217 17TH AVE MONROE, WI 53566	39-1460399	501(C)(3)	19,859.	0.			GAS PIPE RENEWAL, ROOF REPAIR, ELEVATOR AND ELECTRICITY COSTS, GENERAL SUPORT

Schedule I (Form 990)

COMMUNITY FOUNDATION OF SOUTHERN
WISCONSIN, INC.

Schedule I (Form 990)

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Part II Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments (Schedule I (Form 990), Part II.)

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
UNION PRESBYTERIAN CHURCH 2707 - 5TH ST MONROE, WI 53566	39-6094100	CHURCH	9,650.	0.			GENERAL SUPPORT AND ORGAN REPAIRS
UNITED WAY BLACKHAWK REGION 205 N. MAIN STREET, SUITE 101 JANESVILLE, WI 53545	39-6006734	501(C)(3)	8,500.	0.			IMAGINATION LIBRARY, GENERAL SUPPORT
UW-WHITEWATER FOUNDATION, INC. 800 W MAIN ST WHITEWATER, WI 53190	39-6081189	501(C)(3)	10,700.	0.			FACULTY SCHOLARSHIPS, COUNSELING PROGRAM SUPPORT, PARTNERSHIPS FOR PARENTS SUPPORT
VILLAGE OF ARGYLE 401 E. MILWAUKEE STREET, PO BOX 246 ARGYLE, WI 53504	39-6006198	GOVERNMENT	12,195.	0.			AMBULANCE BAY GARAGE DOOR AND OPENER
VILLAGE OF NEW GLARUS 319 SECOND STREET, PO BOX 399 NEW GLARUS, WI 53574-0548	39-6006328	GOVERNMENT	6,377.	0.			GENERAL SUPPORT
WISCONSIN BADGER CAMP, INC. PO BOX 723 PLATTEVILLE, WI 53818	39-1097398	501(C)(3)	6,600.	0.			GENERAL SUPPORT
YERKES FUTURE FOUNDATION, INC. PO BOX 346 WILLIAMS BAY, WI 53191	83-0802129	501(C)(3)	48,667.	0.			A LEGACY OF DISCOVERY, A FUTURE OF IMPACT
YMCA OF NORTHERN ROCK COUNTY, INC. 221 DODGE STREET JANESVILLE, WI 53548	39-0806368	501(C)(3)	26,777.	0.			GENERAL SUPPORT
YWCA ROCK COUNTY 1735 S. WASHINGTON STREET JANESVILLE, WI 53546	39-0808510	501(C)(3)	23,300.	0.			CAPITAL CAMPAIGN, GENERAL SUPPORT

Schedule I (Form 990)

COMMUNITY FOUNDATION OF SOUTHERN
WISCONSIN, INC.

Schedule I (Form 990) 2021

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Part III **Grants and Other Assistance to Domestic Individuals.** Complete if the organization answered "Yes" on Form 990, Part IV, line 22.
Part III can be duplicated if additional space is needed.

(a) Type of grant or assistance	(b) Number of recipients	(c) Amount of cash grant	(d) Amount of non-cash assistance	(e) Method of valuation (book, FMV, appraisal, other)	(f) Description of noncash assistance
SCHOLARSHIPS FOR POST-SECONDARY EDUCATION	463	1,077,907.	0.		

Part IV **Supplemental Information.** Provide the information required in Part I, line 2; Part III, column (b); and any other additional information.

PART I, LINE 2:

THE COMMUNITY FOUNDATION OF SOUTHERN WISCONSIN CONDUCTS A DUE DILIGENCE
PROCESS ON ALL APPLICANTS BEFORE GRANT FUNDS ARE DISBURSED. THE DUE
DILIGENCE PROCESS VARIES AMONG THE FUNDS ADMINISTERED BY THE ORGANIZATION.
SOME FUNDS REQUIRE A GRANT RECIPIENT TO INCUR ALLOWABLE EXPENDITURES AND
SUBMIT APPROPRIATE SUPPORTING DOCUMENTATION BEFORE THE GRANTS FUNDS ARE
DISBURSED WHILE OTHER FUNDS PERIODICALLY DISBURSE GRANT FUNDS UPON THE
RECEIPT OF PROGRESS REPORTS FROM THE GRANT RECIPIENT. NO GRANT RECIPIENT
CAN RECEIVE ANOTHER GRANT UNTIL ALL OUTSTANDING PROGRESS REPORTS ARE

Part IV Supplemental Information

PROVIDED. SCHOLARSHIP FUNDS ARE DISBURSED DIRECTLY TO THE RECIPIENT'S EDUCATIONAL INSTITUTION ONCE ALL THE NECESSARY CRITERIA HAVE BEEN SATISFIED.

PART II, LINE 1, COLUMN (H):

NAME OF ORGANIZATION OR GOVERNMENT: CITY OF LANCASTER

(H) PURPOSE OF GRANT OR ASSISTANCE: BATH HOUSE, BAKETBALL COURT, WARMING HOUSE, AND PICNIC SHELTER IMPROVEMENTS, RADAR SPEED SIGN, SANTA MAILBOX AND MUSIC AND MICS PROGRAMS SUPPORT

NAME OF ORGANIZATION OR GOVERNMENT: CITY OF MONROE

(H) PURPOSE OF GRANT OR ASSISTANCE: BALLFIELD RENOVATION, AIR SCRUBBERS, SPACE STUDY/DESIGN WORK FOR PROPOSED NEW SENIOR CENTER

NAME OF ORGANIZATION OR GOVERNMENT:

CITY OF MONROE PARKS & RECREATION DEPARTMENT

(H) PURPOSE OF GRANT OR ASSISTANCE: FIREWORKS CELEBRATION SUPPORT, SPLASH PAD CONSTRUCTION, SCHOLARSHIP SUPPORT, SPECIAL NEEDS PROGRAM SUPPORT

NAME OF ORGANIZATION OR GOVERNMENT:

COMMUNITY ACTION, INC. OF ROCK AND WALWORTH COUNTIES

(H) PURPOSE OF GRANT OR ASSISTANCE: PERSONAL RESPONSIBILITY EDUCATION, FATHERHOOD INITIATIVE, SKILLS ENHANCEMENT PROGRAM, SNACKPACKERS

NAME OF ORGANIZATION OR GOVERNMENT: PARKVIEW SCHOOL DISTRICT

(H) PURPOSE OF GRANT OR ASSISTANCE: SNOWSHOES, CODING PROGRAM, PE EQUIPMENT, LIGHTBOXES FOR ART CLASSES, LMC READING CORNER RENOVATION,

Part IV Supplemental Information

SHOWSHOES

NAME OF ORGANIZATION OR GOVERNMENT:

PLEASANT VIEW NURSING HOME OF GREEN COUNTY

(H) PURPOSE OF GRANT OR ASSISTANCE: LANDSCAPING & GARDEN IMPROVEMENTS; DAY ROOM RENOVATIONS, OUTDOOR LIGHTING, WHEELCHAIR ACCESSIBLE TABLES

NAME OF ORGANIZATION OR GOVERNMENT: SCHOOL DISTRICT OF HILLSBORO

(H) PURPOSE OF GRANT OR ASSISTANCE: WHITEBOARDS, STANDING DESKS, CLASSROOM BULLETIN BOARDS, MATH AND LITERACY PROGRAM SUPPORT, ONLINE TESTING COMPUTER

NAME OF ORGANIZATION OR GOVERNMENT: SCHOOL DISTRICT OF MONROE

(H) PURPOSE OF GRANT OR ASSISTANCE: TABLE SAW ADDITIONAL, STUDENT ACTIVITIES, PODCASTING AND BROADCASTING EQUIPMENT FOR NEW COURSE

COMMUNITY FOUNDATION OF SOUTHERN
WISCONSIN, INC.

Part IV Business Transactions Involving Interested Persons.

Complete if the organization answered "Yes" on Form 990, Part IV, line 28a, 28b, or 28c.

(a) Name of interested person	(b) Relationship between interested person and the organization	(c) Amount of transaction	(d) Description of transaction	(e) Sharing of organization's revenues?	
				Yes	No

Part V Supplemental Information.

Provide additional information for responses to questions on Schedule L (see instructions).

SCH L, PART III, GRANTS OR ASSISTANCE BENEFITTING INTERESTED PERSONS:

(A) NAME OF PERSON: LINDSEY HAIGHT

(B) RELATIONSHIP BETWEEN INTERESTED PERSON AND ORGANIZATION:

DAUGHTER OF STAFF MEMBER DAVE HAIGHT

(C) AMOUNT OF GRANT \$ 2,000.

(D) TYPE OF ASSISTANCE: SCHOLARSHIP

(E) PURPOSE OF ASSISTANCE: GENERAL ASSISTACE

**SCHEDULE M
(Form 990)**

Noncash Contributions

OMB No. 1545-0047

2021

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

- ▶ Complete if the organizations answered "Yes" on Form 990, Part IV, lines 29 or 30.
- ▶ Attach to Form 990.
- ▶ Go to www.irs.gov/Form990 for instructions and the latest information.

Name of the organization **COMMUNITY FOUNDATION OF SOUTHERN WISCONSIN, INC.** Employer identification number **39-1711388**

Part I Types of Property

	(a) Check if applicable	(b) Number of contributions or items contributed	(c) Noncash contribution amounts reported on Form 990, Part VIII, line 1g	(d) Method of determining noncash contribution amounts
1 Art - Works of art				
2 Art - Historical treasures				
3 Art - Fractional interests				
4 Books and publications				
5 Clothing and household goods				
6 Cars and other vehicles				
7 Boats and planes				
8 Intellectual property				
9 Securities - Publicly traded	X	37	706,347.	QUOTED MARKET PRICES
10 Securities - Closely held stock				
11 Securities - Partnership, LLC, or trust interests				
12 Securities - Miscellaneous				
13 Qualified conservation contribution - Historic structures				
14 Qualified conservation contribution - Other				
15 Real estate - Residential				
16 Real estate - Commercial				
17 Real estate - Other				
18 Collectibles				
19 Food inventory				
20 Drugs and medical supplies				
21 Taxidermy				
22 Historical artifacts				
23 Scientific specimens				
24 Archeological artifacts				
25 Other ▶ (AUCTION ITEMS)	X	7	2,140.	COST/SELLING PRICE
26 Other ▶ (BALLOONS)	X	1	95.	COST/SELLING PRICE
27 Other ▶ ()				
28 Other ▶ ()				

29 Number of Forms 8283 received by the organization during the tax year for contributions for which the organization completed Form 8283, Part V, Donee Acknowledgement 29 0

	Yes	No
30a During the year, did the organization receive by contribution any property reported in Part I, lines 1 through 28, that it must hold for at least three years from the date of the initial contribution, and which isn't required to be used for exempt purposes for the entire holding period?		X
b If "Yes," describe the arrangement in Part II.		
31 Does the organization have a gift acceptance policy that requires the review of any nonstandard contributions?	X	
32a Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash contributions?		X
b If "Yes," describe in Part II.		
33 If the organization didn't report an amount in column (c) for a type of property for which column (a) is checked, describe in Part II.		

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990. Schedule M (Form 990) 2021

Part II **Supplemental Information.** Provide the information required by Part I, lines 30b, 32b, and 33, and whether the organization is reporting in Part I, column (b), the number of contributions, the number of items received, or a combination of both. Also complete this part for any additional information.

SCHEDULE M, PART I, COLUMN (B):

THE ORGANIZATION IS REPORTING THE NUMBER CONTRIBUTIONS RECEIVED IN
COLUMN B.

**SCHEDULE O
(Form 990)**

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990 or 990-EZ

Complete to provide information for responses to specific questions on
Form 990 or 990-EZ or to provide any additional information.

▶ Attach to Form 990 or Form 990-EZ.

▶ Go to www.irs.gov/Form990 for the latest information.

OMB No. 1545-0047

2021

Open to Public
Inspection

Name of the organization	COMMUNITY FOUNDATION OF SOUTHERN WISCONSIN, INC.	Employer identification number	39-1711388
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FORM 990, PART I, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:

PHILANTHROPIC GRANTING ORGANIZATION THAT MATCHES PERSONAL PHILANTHROPY WITH COMMUNITY NEEDS THROUGH GRANTS AND SCHOLARSHIPS FROM ENDOWED AND NON-ENDOWED FUNDS.

FORM 990, PART III, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:

FOUNDATION OF SOUTHERN WISCONSIN HAS BEEN RECOGNIZED AS MEETING THE HIGHEST STANDARDS FOR COMMUNITY FOUNDATIONS NATIONWIDE BY THE COMMUNITY FOUNDATIONS NATIONAL STANDARDS BOARD. THE COMMUNITY FOUNDATIONS NATIONAL STANDARDS BOARD MEASURES QUALITY, INTEGRITY AND ACCOUNTABILITY IN SIX KEY AREAS OF COMMUNITY FOUNDATION OPERATIONS: MISSION, STRUCTURE, AND GOVERNANCE; RESOURCE DEVELOPMENT; STEWARDSHIP AND ACCOUNTABILITY; GRANT MAKING AND COMMUNITY LEADERSHIP; DONOR RELATIONS; AND COMMUNICATIONS. THE COMMUNITY FOUNDATIONS NATIONAL STANDARDS BOARD HAS REACCREDITED THE COMMUNITY FOUNDATION OF SOUTHERN WISCONSIN UNTIL 2026.

FORM 990, PART VI, SECTION B, LINE 11B:

THE PREPARED FORM 990 IS REVIEWED BY THE EXECUTIVE DIRECTOR AND THE CFO AND A COPY OF THE RETURN IS MADE AVAILABLE TO ALL MEMBERS OF THE GOVERNING BODY BEFORE THE RETURN IS SIGNED BY THE PRESIDENT/CEO OF THE GOVERNING BODY AND FILED WITH THE IRS.

FORM 990, PART VI, SECTION B, LINE 12C:

ANNUALLY ALL DIRECTORS AND EMPLOYEES REVIEW THE CONFLICT OF INTEREST POLICY AND COMPLETE A STATEMENT THAT DISCLOSES ANY INTERESTS THAT COULD GIVE RISE

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Schedule O (Form 990) 2021

Name of the organization	COMMUNITY FOUNDATION OF SOUTHERN WISCONSIN, INC.	Employer identification number	39-1711388
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TO CONFLICTS. THE POLICY IS REVIEWED AND ANY INTERESTS ARE AGAIN DISCLOSED BEFORE ALL MEETINGS OF THE GRANT SELECTION COMMITTEE. THESE DISCLOSURES ARE REVIEWED BY THE EXECUTIVE DIRECTOR AND ARE MONITORED THROUGHOUT THE YEAR FOR ANY CONFLICTS THAT MAY ARISE. ANY PERSON WITH A CONFLICT IS PROHIBITED FROM PARTICIPATING IN THE GOVERNING BODY'S OR COMMITTEE'S DISCUSSIONS AND DECISIONS REGARDING THE RELATED TRANSACTION.

FORM 990, PART VI, SECTION B, LINE 15A:

THE DIRECTORS ANNUALLY CONDUCT A PERFORMANCE EVALUATION OF THE PRESIDENT/CEO AND MAKE ANY RECOMMENDATIONS FOR COMPENSATION. THE DIRECTORS USE DATA FROM THE MOST RECENT COMPENSATION SURVEY PUBLISHED BY THE COUNCIL ON FOUNDATIONS TO DETERMINE THE PRESIDENT/CEO'S COMPENSATION. THE DIRECTORS ARE ALSO WELL DIVERSIFIED IN PROFESSIONS AND HAVE EXPERIENCE WITH CURRENT COMPENSATION LEVELS IN THE REGION. THE PRESIDENT/CEO'S COMPENSATION IS APPROVED BY THE MEMBERS OF THE GOVERNING BODY AS PART OF THE ANNUAL BUDGETING PROCESS.

FORM 990, PART VI, SECTION C, LINE 19:

THE ORGANIZATION MAKES ITS GOVERNING DOCUMENTS, CONFLICT OF INTEREST POLICY, AND AUDITED FINANCIAL STATEMENTS AVAILABLE TO THE PUBLIC UPON REQUEST.

FORM 990, PART XI, LINE 9, CHANGES IN NET ASSETS:

NET CHANGE IN FUNDS HELD FOR OTHER ORGANIZATIONS 285,021.