

# Madison Gives

Community Impact: Changing the Landscape in Madison



## IN THIS ISSUE

**History of the Community Impact Fund**

Page 3

**Grants That Are Having an Impact**

Page 4

**Living By Our Values**

Page 6

**Giving Back to the Community That Helped Shape Him**

Page 7



**Madison**  
COMMUNITY FOUNDATION

Fall 2023



## Mission

The mission of Madison Community Foundation is to enhance the common good through philanthropy. Join us.



## Board of Governors

Christine Rew Barden,  
Chair  
Anne Lucke, Vice Chair  
Jeff Bartell  
Shiva Bidar  
Anna Burish  
Natalie Erdman  
Roberta Gassman  
Therese Gulbransen  
Gloria Ladson-Billings  
Gary A. Mecklenburg  
Ron Mensink  
Eugenia Podestá  
E.G. Schramka  
Tripp Widder  
Noble Wray

## Design/Printing

designCraft Advertising  
Heritage Printing

# SEE THE IMPACT. BE THE IMPACT.

As the community's foundation, MCF is focused on creating a community that is vibrant, generous and where all people thrive. Everyone plays a role in this, whether you have a named fund, have planned a legacy gift to MCF, or have contributed to one of MCF's grantmaking funds.

Philanthropy helps strengthen our community and it's something we all can be involved in. Whether you give \$5 or \$5 million, it makes a difference. And our community — the Greater Madison area — is enriched by the diversity of your generous support.



We are stronger today because so many of you have come together to build our Community Impact and Field of Interest Funds. These funds support the arts, community development, our environment and learning for all. They provide support to nonprofit organizations working to increase their capacity to carry out their work.

The Community Impact Fund, in particular, allows MCF to capitalize on opportunities in the community and to address its needs.

In this newsletter, I invite you to explore the impact your gifts to MCF have had on the community through MCF's grantmaking over the past five years; learn about the Community Impact Fund's history; and get to know a fundholder whose gifts have helped the Community Impact Fund grow.

I hope you are inspired to be part of this in some way, large or small. In October, you will receive a letter inviting you to make a gift to have an enduring impact on our community. Whether you want to support MCF's competitive grantmaking through the Community Impact Fund, contribute to or create a Field of Interest Fund, or add to your own fund, your gift supports our mission of enhancing the common good through philanthropy.

Thank you.

Christine Rew Barden, Board Chair

*Christine is a shareholder in Reinhart's Trusts and Estates Practice, and founder and chair of the firm's Family Offices Group. She has extensive experience in assisting her clients in the development and implementation of estate planning and transition strategies intended to preserve family wealth as well as maintain and foster relationships across generations.*

**On the Cover:** Over the years, your contributions to the Community Impact Fund have supported (clockwise from top) the Goodman Community Center, Monona Terrace, the Madison Youth Arts Center, and Overture Center.



# BY AND FOR THE COMMUNITY: MCF's Community Impact Fund

Every fall, MCF's staff and grantmaking committee consider nearly 100 letters of inquiry as part of its grantmaking process. The strongest inquiries receive invitations to submit full grant proposals, which are carefully reviewed. The grants that are ultimately awarded through this process come from MCF's Community Impact Fund. And while this fund is one of many at MCF from which grants are distributed, it is certainly the most well-known.

MCF has a long and rich 81-year history, but it wasn't until about halfway through its existence that it developed its own grantmaking program. The grantmaking program's creation was a testament to the community's belief in MCF's mission and vision, and a desire by many people to contribute to the common good through MCF.



*The Community Impact Fund  
has provided support for libraries  
throughout Dane County.*

In 1986, MCF created the Founders' Fund, giving community members an opportunity to contribute to an unrestricted endowment that would be used for current and future grantmaking. The goal for the fund was \$100,000.

The fund proved to be popular, and the generous gifts of community members allowed MCF to begin a competitive grantmaking program focused on supporting causes such as civics & environment; culture & arts; education; elderly; health & human services; and youth organizations and programs. By the start of 1994, 43 individuals and couples in the community had contributed \$5,000 or more to build the Community Foundation's grantmaking capacity.

## An Extraordinary Gift Accelerates Impact

In January 1991, MCF's Board President W. Robert Koch announced that MCF had received what was at the time the single largest philanthropic gift in Madison's history — a \$15 million bequest from Marie Graber, former president of Graber Industries in Middleton. Graber's gift was endowed alongside the Founders' Fund to expand MCF's competitive grantmaking.

These funds together form the core of what is now known as the Community Impact Fund — a resource that will support the community for generations to come.

## Supporting Construction of a Landmark Venue

Since 1991, MCF has awarded more than \$43 million in Community Impact grants to more than 500 organizations — changing the skyline of Madison and providing opportunities for thousands of people.

One of the earliest grants awarded from the fund was a \$1 million gift for the construction of Monona Terrace — lending financial legitimacy to the project and helping spur additional gifts by others in the community. In turn, the development of Monona Terrace prompted other developments in downtown Madison — from Overture Center to condominiums — all strengthening the heart of our community.

## Continued Growth Allows Larger Impact

Today, 30 additional named funds and the contributions of hundreds of individuals are combined with the Founders Fund and the Anna Marie Graber Martens Fund to support MCF's grantmaking programs. Distributions from these endowments support nonprofit organizations that are addressing the needs and opportunities found in our community each year.

At the heart of these endowments is the recognition that, as Aristotle observed, "... the whole is greater than the sum of its parts." Each year people in our community — with varying levels of capacity — come together united by their love for this community, and desire to make it stronger. They make gifts to the Community Impact Fund, creating a larger permanent resource to support our community this year, next year and for decades into the future.

You can read about the impact of two projects the Community Impact Fund has supported on page 4. If you want to explore more about the impact your gifts to the fund have on our community, visit our website at [www.madisongives.org/nonprofits/CI-grants](http://www.madisongives.org/nonprofits/CI-grants).



## HAVING AN IMPACT

As its name implies, MCF's Community Impact Fund hopes to support organizations and projects that will have a lasting impact on our community and the people who live here. Each opportunity is different, but they all touch the lives of people in ways that can provide lasting benefits. These programs may offer broad, community-wide opportunities, such as Middleton's Stone Horse Green, or focus on a specific group or area, like the work done by CEOs of Tomorrow. Both initiatives were funded by Community Impact grants in the past few years, and already are making a difference.

### Designed by and for the Community: Stone Horse Green in Middleton

Over the past decade, the City of Middleton has experienced rapid growth in both size and diversity. With this growth came the opening of more local businesses and restaurants, creating a bustling downtown. Yet for a city that prides itself on its social infrastructure, Middleton lacked a central gathering place for residents and visitors. The City decided to work with residents to identify a solution that would meet the needs of the growing community.

The process began with a plywood sign in an unused lot asking Middleton residents, "What do you want to see here?" Through this survey, the city recognized there was a strong desire for a green space, a public plaza and a community center in the downtown. Working with residents every step of the way through continued outreach and workshops, the City began to design the Stone Horse Green.

The community input led to a nest-like design that draws people to the plaza, complete with open green space, band shell, sitting area, fire pits and public art installation, at the center of downtown Middleton. The plaza was intentionally designed to promote inclusivity and community building by supporting physical activity, stress alleviation and stimulating social interaction.

But building the plaza was only the first step. To help plan programs that would appeal to a wide range of audiences and draw them to the space, MCF granted the City of Middleton \$15,000 seed money.



Stone Horse Green opened to the public in October 2022 with the Strollin' Middleton Jazz Fest. The two-day festival brought hundreds of people to the plaza and featured multiple local musicians and artists, including Black Power Dance, Darren Sterud, and Chicago-based Dee Alexander.

Since then, dozens of events have followed, thanks to partnerships with area nonprofits and local business and restaurants. The City also hosted Fall Fun movies, featuring *Coco*, and a Summer Fun Concert Series, featuring Orquesta SalSoul Del Mad with salsa dancing in the street.

When planning events, the City also wanted to ensure people of all ages can enjoy them. Suessa-Palooza, a celebration of Dr. Seuss' birthday, was wildly popular with local families. The event boasted storytelling, games on the green and performances by performers from Madison Circus Space.

*Continued on page 6*





## An Innovative Approach to Learning: CEOs of Tomorrow

For some young people in Dane County, traditional learning environments fall short, leaving them behind their peers in critical ways that can limit their potential far into the future. Traditional learning also can lack real-life applicability and doesn't generally teach necessary life skills that children may not learn at home. To engage students and help bridge the gap, Dr. Roxie Hentz launched CEOs of Tomorrow, a program designed to empower youth by offering a unique, hands-on approach to learning crucial financial wellness and job-readiness skills through social entrepreneurship programs.

CEOs of Tomorrow developed a recipe for success: take students, nurture their ideas to unlock their entrepreneurial potential, and show them how to make money while also making the world a better place. In the process, CEOs is transforming youth into critical thinkers and confident leaders.

Seeing a transformation in the students' willingness to learn and recognizing that families may not have the financial capacity or time to participate in after-school programs, CEOs of Tomorrow sought to bring its program directly to Dane County schools.

In 2021, CEOs of Tomorrow launched its School-Based Entrepreneurship Program with the help of a \$30,000 Community Impact grant from MCF. CEOs of Tomorrow chose Badger Rock Middle School and Prairie Phoenix Academy to launch the in-school program because of those schools' unique learning environments and the economic and racial make-up of their student populations.



In the eight week-course, students deepen collaboration by creating their own business as a team, building real-world skills in the process. Students brainstorm ideas, create a business plan, make their own product, design logos and flyers, learn to budget, and sell their product to family and peers, splitting the profits. Students also choose a social cause to support and donate a percentage of their profits to a local organization working towards that cause.

CEOs of Tomorrow partners with Rooted Inc. to provide fresh vegetables and herbs and teach culinary skills during the product development stage. It also partners with Summit Credit Union to set up savings accounts and teach financial literacy skills. The program is designed to allow students to gain high school credit by earning a Social Entrepreneurship Digital Badge that demonstrates the skills they learned. These badges can also be used on college applications and shown to potential employers in the future.

*Continued on page 6*

# LIVING BY OUR VALUES

## MCF's Hate-Free Grantmaking Policy

MCF is proud to offer donor-advised funds to help people in our community achieve their philanthropic goals. We recognize that they are a valuable tool for donors, and the endowments they help build provide support for our community for generations to come.

Fundholders at MCF recommend distributions from their funds to a wide variety of nonprofit organizations, and generally MCF honors their requests. However, all grant and distribution requests do require board approval. We do this to ensure that organizations meet the IRS requirements as nonprofits eligible to receive the grants, and to ensure that grantmaking made by MCF and its fundholders does not support activities that are contrary to our mission, vision and values.

To better ensure that our own grantmaking and the distributions recommended by our fundholders remain aligned with our values, MCF implemented a **Hate-Free Grantmaking Policy:**

Madison Community Foundation will not knowingly support any organizations that discriminate on the basis of actual or perceived race, color, religion, age, sex, national origin, disability, ancestry, sexual orientation, gender identity, marital status, or arrest or conviction record, or any other discriminatory basis prohibited by applicable local, state and federal law (anti-discrimination status).

Further MCF will not make grants to nonprofit organizations that the Foundation believes, in its sole discretion, intend to support or engage in hateful activities. We consider hateful activities to mean activities that incite or engage in violence, dehumanization, intimidation, harassment, threats, defamation, or misinformation targeting an individual or group based on their anti-discrimination status.

MCF primarily draws on the expertise of the Southern Poverty Law Center to determine whether an organization is engaged in hateful activities and therefore ineligible to receive distributions from our funds. We also may draw on other sources of information as needed to be confident that we are not funding hate groups.

### Living by Our Values

MCF works to ensure our actions align with our values in all that we do. This policy is one of many tools we use to do this. MCF's value are:

#### INTEGRITY

We create trust by acting with transparency.

#### GENEROSITY

We inspire giving to improve our world.

#### EFFECTIVENESS

We identify opportunities, align actions and produce results.

#### PERMANENCE

We build endowments to create a legacy for the future.

#### EQUITY

We advance fairness, inclusion and respect.

### Stone Horse Green

*continued from page 4*

To get older generations involved, the City worked closely with the Middleton Senior Center when planning its Wellness Week and Make Music Middleton Day. Trivia nights and tai chi and yoga classes at Stone Horse Green have drawn multi-generational crowds.

The City's Director of Planning & Community Development, Abby Attoun, said, "The greatest impact of the plaza has been providing our community with a central gathering space for all ages that is always here, always free and always open to the public." The City is excited to roll into the next year of programming with the second Strollin' Middleton Jazz Fest this September. You can find the full schedule of events at [www.stonehorsegreen.org/events](http://www.stonehorsegreen.org/events).

### CEOs of Tomorrow

*continued from page 5*

The School-Based Entrepreneurship Program has now run successfully for three semesters in four schools and has involved 93 students. Emily Fisher, one of the Youth Empowerment Coaches, said, "The greatest impact has been the self confidence boost to our students when they get to see their hard work come to life on launch day, supported by their families, teachers and community."

By uplifting students' ideas and making them a reality, CEOs of Tomorrow is inspiring the next generation to change the world through business solutions created to benefit society.

You can learn more about CEOs of Tomorrow and their youth entrepreneurs at [www.ceosoftomorrow.org](http://www.ceosoftomorrow.org).



# GIVING BACK TO THE COMMUNITY THAT HELPED SHAPE HIM

When Wynn Davies arrived in Madison in 1950 as a 17-year-old college freshman, he met a much wider world than he had experienced growing up in the small village of Garden Prairie, Illinois. It was a world that he found fascinating, and that shaped his life in ways large and small.

“Madison and the University of Wisconsin were calling me from an early age,” Wynn explained. “My mother graduated from the University in the 1920s and I always assumed that someday I too would be heading to Madison to begin my own adventure there.”

Wynn lived in an historic Victorian house on Mills Street that served as the Baptist Student Center. His housemates were a diverse group of students whose life experiences were wide-ranging and very far from what Wynn had experienced in his rural midwestern life.

“My first roommate was a Palestinian refugee. I got to know African American students who had grown up in America’s ‘apartheid’ south, and a refugee who had escaped from Estonia by boat just ahead of the oncoming Russian army,” Wynn recalled.

Wynn also met a girl named Loree from Wisconsin’s Northwoods when they both were assigned to peel potatoes at the Baptist Student Center’s eating cooperative. Wynn and Loree married in 1954.

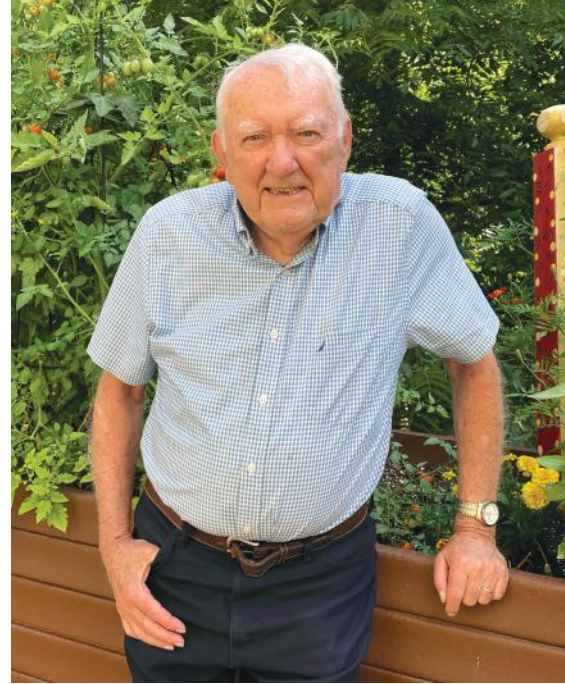
## Called to Serve

Their church and faith remained a vital element throughout their lives. “I feel that I was called to public service, and to work for social and economic justice in the same way that others are called to become pastors,” Wynn shared.

After several years of service in the U.S. Army, and with a graduate degree in Public Administration, Wynn and Loree returned home to Madison. Wisconsin was working to bring more professional public management expertise to the state’s civil service. It was a natural fit for Wynn. “I felt that a career in social welfare and social justice suited my values and faith,” Wynn explained, “so I took a position in the state’s human services agency.”

As their children got older, Loree was able to pursue her career in occupational therapy, and they settled in to enjoy all that Madison had to offer.

Wynn and Loree took early retirement to focus on the things that meant the most to them, especially spending time together and with their grandchildren. For Wynn, retirement also meant becoming more involved in his church’s social justice work.



Through this, he learned about community development loan funds, which led him to help start the Dane Fund, which is known today as Forward Community Investments. He was its first president.

## Planning a Lasting Legacy

“As Loree and I looked to the future, beyond our lives here on Earth, we agreed that it would be important for us to give back to our community, and to the University of Wisconsin — both of which had given so much to us,” Wynn shared. “We owe Madison a great deal because of its influence on making us who we are and what we’ve done.”

Loree passed away in 2017, and in 2020, Wynn established a fund at MCF to honor those intentions. The Loree and Wynn Davies Family Fund supports MCF’s Community Impact Fund.

Wynn intends to further grow the fund through their estate, leaving a legacy of support to the community that nurtured his family and helped expand his horizons and shape him into the person he is today.

“Madison Community Foundation is an excellent way to give back,” Wynn said. “It offers a wide variety of options to use our estate to support work that matches our values and passion for social and economic justice, as well as the many things that make Madison such a wonderful place to live and grow.”

Giving to the Community Impact Fund also reassures Wynn his giving will remain relevant long into the future. “MCF’s staff is devoted to understanding the needs of the community — they know where the money can have the most impact on my goals even as those needs shift.”

# SAVE THE DATE

## October 3-5

MCF office closed while staff attends YWCA Racial Justice Summit

## October 12

*Nonprofit Fundholder Conversations*

**Share Your Story: How to Communicate More Effectively**

## December 15

Last day to submit grant recommendations from your fund



111 N. Fairchild Street, Suite 260  
Madison, WI 53703

NONPROFIT  
ORGANIZATION  
U.S. POSTAGE  
PAID  
MADISON WI  
PERMIT NO. 1742

## LEAVE A LEGACY OF SUPPORT

Do your estate planning goals include charitable giving? If you intend to make bequests to both charitable organizations and to your heirs, the assets you designate for each type of bequest can make a difference.

Public charities typically do not pay income tax when they receive donations. However, your heirs could be required to pay significant taxes on funds they receive from your traditional individual retirement account or qualified retirement plan. This means it may be more tax effective to fund charitable bequests from your retirement plans and bequests to your heirs with assets that will not be immediately taxable to them (for example, appreciated stock that is eligible for a step-up in basis at your death). Your advisor can help you determine what makes tax sense in your circumstances.

### Name a Nonprofit as Beneficiary

One of the simplest ways to use your retirement funds to support a nonprofit, including MCF, is naming the organization as the beneficiary of your IRA or qualified retirement plan. Simply update the beneficiary designation forms for your account or plan. You also may want to let the organization know your plans and provide guidance on how you would like it to use the funds.

### Use a Qualified Charitable Distribution to Create a Charitable Gift Annuity

Thanks to the Secure Act 2.0, you can now use a qualified charitable distribution from your IRA to fund a charitable gift annuity. A CGA allows you to provide a gift for the nonprofit of your choice after your death, while providing you with a lifetime income stream. The Secure Act limits this to a one-time maximum transfer of \$50,000, and you must be at least 70.5 to qualify. Your financial advisor can help you determine if this is a good strategy to meet your goals. If your goals include supporting one of MCF's grantmaking funds, you can do this with a CGA as well.

### Let Us Know if We Can Help

Legacy giving is a popular way of supporting MCF's grantmaking funds, which include the Community Impact Fund, the Priority Fund, and MCF's Field of Interest Funds. Since 2018, nearly 50% of new legacy gift commitments have designated these funds as the recipient.

If you are interested in making a legacy bequest from your IRA or qualified retirement plan, we can help you provide permanent support for the organizations and causes that are meaningful to you.