

Madison Gives

Winter 2024

In This Issue

Jenifer Winiger Builds Her Legacy

Page 3

Community Impact Grants Awarded

Page 4

Give Now or Leave a Legacy? Blended Giving Lets You Do Both

Page 6



Madison
COMMUNITY FOUNDATION



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
Nancy Boebel
Anna Burish
Natalie Erdman
Therese Gulbransen
Frances Huntley-Cooper
Gloria Ladson-Billings
Gary A. Mecklenburg
Eugenia Podestá
E.G. Schramka
Tripp Widder
Noble Wray

Design/Printing

designCraft Advertising
Heritage Printing

On the cover:

We Can Do It (Rosie the Riveter)
by Lee Leuing & Sherry Treeby.
Village of Oregon sculpture tour.
Photo by Beth Skogen.

I often refer to Madison Community Foundation (MCF) as the “community’s foundation.” It’s an important perspective, because it reflects the most important thing we do – bring our friends and neighbors together to build on our common shared values and create a permanent legacy for this community we all love.



We think about “community” in many ways. Traditionally, community foundations reflect a specific geographic area – something we all share, regardless of other differences we may have. Of course, “community” also can reflect affinity, where people come together around common interests, attitudes, beliefs and goals.

In this newsletter, we explore the intersection of legacy and community. While people often think about leaving a legacy as something that happens after their death, beginning that legacy during your lifetime allows you to reflect over time on what community means to you.

My wife and I began developing our legacy for greater Madison nearly a decade ago. Since then, our kids have graduated high school and college. We’ve surpassed our initial goals for our fund and set new ones. We’ve added the fund as a beneficiary in our will. Starting our fund during our lifetime gave us the benefit of reflecting on what is most important to us. And while we still support organizations that have been meaningful in our lives, we understand that the community’s needs will evolve in ways we can’t anticipate – so we are planning to increase our support for MCF’s grantmaking programs.

The grants on page 4, in large part, reflect the permanent legacies people have created to support MCF grantmaking programs. Many of these donors began building MCF’s grantmaking capacity with annual gifts during their lifetimes. Jenifer Winiger’s story on page 3 is a great example.

On page 6, we explore how MCF can help you combine your desire to see the impact of your giving during your lifetime with the ability to have a larger impact through your estate. And on page 7, we look at the ways you can use succession planning to extend your support for generations to come.

A community foundation’s special power is helping people create legacies that reflect their values, relationships and priorities, regardless of their individual financial capacity.

What’s your legacy?

Bob Sorge
President & CEO

A Legacy Built on a Lifetime of Involvement

The idea of leaving a legacy through philanthropy began to resonate with Jenifer Winiger after the passing of her parents. “I think it’s natural to start thinking about ‘legacy’ as we get older and start losing people,” Jen explained.

Jen already had a strong connection with MCF through her involvement with A Fund for Women. “I met Jane Coleman when I interviewed her for a column about prominent Madisonians,” Jen shared. “Jane was such an inspiration to me, and eventually became a role model, a freelance employer and a close friend. When she started A Fund for Women, I was honored to be part of that.” Jen became one of AFFW’s founding supporters, a future board chair, and remains a supporter today.

After her husband Phil Winiger’s sudden death in 2011, Jen started contemplating the impact she knew he would have liked to leave in our community. “Phil thought AFFW was a terrific fund, and I already was working with MCF, so I could see how legacy giving could make a difference,” Jen explained.

Jen’s estate plan includes gifts to MCF to establish two funds: the “In Honor of Jane Coleman” Community Impact Fund and the “In Memory of Phil Winiger” AFFW Fund. “I wanted to honor my husband and Jane, two people who meant the world to me. Planning a legacy gift and naming the funds in their honor seemed like a natural way to do that.

“The idea of leaving a legacy also was comfortable — because the gift comes out of my estate, it doesn’t affect my financial security should something unexpected come up, and it allows me to continue to support the causes that are meaningful to me after I’m gone.”

Jen feels deeply about the challenges facing the world today and is using her legacy to help the people of Madison address them. But she also recognizes that over time those challenges will shift, which is why she has chosen to support MCF’s Community Impact Fund as part of her legacy plan. “I have witnessed so many changes in my life and in Madison, and I find it reassuring that MCF is able to adapt to these evolving circumstances and prioritize what matters most for the community.”

Her legacy gift for AFFW makes sense to her because she sees the ongoing need to support women financially and address persistent setbacks. She knows AFFW’s grantmaking will continue to champion equal opportunities, for both young girls and women who continue to struggle in so many areas and desperately need innovative programs.

When asked about how she wants to be remembered, Jen instead talks about the joy she gets from seeing the impact of philanthropy spreading. “I think that change happens one person at a time,” Jen said. “I believe in MCF and what it’s doing. It’s what Jane promised me so many years ago: Participation in philanthropy is not only vital to us all, it’s actually ‘fun’ to be part of it.”



Jenifer Winiger and Jane Coleman showing off their identical Christmas gifts from Joan Klaski, former MCF Associate Director. The three met through MCF and remain close friends.

What do I want my legacy to be? If you’re undecided about how you would like to structure your legacy, MCF can help. Our donor engagement team has a variety of tools available to help you explore your interests and values and better define your individual or family goals.



Powered by Community Generosity

MCF's 2023 Community Impact Grants

In 2023, MCF awarded \$935,000 in grants to 19 nonprofit organizations across the Greater Madison area. “These grants represent the seeds of change,” Tom Linfield, MCF’s Vice President of Community Impact, remarked. “From expanding home ownership opportunities to restoring waterways to ensuring the arts are accessible to a wide range of people, these nonprofits are the backbone of our region. MCF is proud to invest in these organizations, and to stand by their side as they work to achieve their vision.”

Bob Sorge, MCF’s President and CEO, added, “These grants and the impact they will have on our community are a testament to the incredible generosity of the people who contribute to MCF’s Community Impact and Field of Interest Funds each year. Their contributions, large and small, empower MCF’s grantmaking.”

Improving the Quality of Life Through Art

Several of this year’s grants acknowledge the importance of art and cultural opportunities to people’s quality of life. Whether that is in the form of ARTS for ALL Wisconsin’s adaptive dance program for people with disabilities, supporting and nurturing theater directors across the state in Forward Theater Company’s Wisconsin Directors Lab, or showcasing international and First Nations sculptors at the Harry Whitehorse International Wood Sculpture Festival, these organizations are helping bring the arts into more people’s lives.

The Village of Oregon, one of this year’s grant recipients, and its surrounding areas are home to many diverse artists, and the Village has chosen to highlight their talent while improving the quality of life for area residents using public art – especially sculpture. With help from the grant from MCF, the Village plans to add new pieces to its successful Sculpture Tour.

“[We are] excited to partner with Madison Community Foundation to bring more public art to Oregon and Dane County,” Oregon Public Art Committee member Randy Glysch shared. “We look forward to celebrating the impact local artists have on our communities through the installation of more public art.”

- ARTS for ALL Wisconsin
- Forward Theater Company
- Harry Whitehorse International Wood Sculpture Festival
- Overture Center Foundation
- Urban Community Arts Network
- Village of Oregon



Urban Community Arts Network is working to create a music ecosystem in Greater Madison that includes access for all types of music with programs like the Mad Lit summer concert series.



Wisconsin Youth Company is working to develop a grassroots advocacy campaign to increase funding for out-of-school-time programming across the state.

Transforming Our Community

Over the years, MCF has supported many organizations and projects that have transformed our community. Several organizations receiving grants in 2023 are working on transformational projects that will give broader and more equitable access to homeownership, provide more neighborhoods with the health-giving benefits of an urban tree canopy, and improve access to some of our region’s beautiful recreation areas.

Other organizations are working to expand the transformational power of education to more students, addressing racial disparities and providing support to nontraditional students.

The Madison Area Community Land Trust uses an innovative approach to creating an affordable path to homeownership for families left out of the traditional housing market. Their landbank-based housing developments ensure that these homes remain affordable. Olivia Williams, Executive Director at MACLT, explained that this grant will help the organization “build a self-sustaining Housing Development Program to drastically increase MACLT’s growth and the number of permanently affordable homeownership units in the land trust.”

- Friends of the Nolen Waterfront
- Madison Area Community Land Trust
- Natural Circles of Support
- Omega School
- Urban Tree Alliance
- Village of DeForest

Helping Organizations Grow

Another recurring theme in this year’s grants is growth: helping organizations become better staffed and resourced to grow, pursue ambitious capital campaigns, and scale up key projects. For two of our grant recipients, the focus is on addressing the lack of quality care for children when they are not in school. The Playing Field is working to expand childcare opportunities for some of the city’s most vulnerable families, and the Wisconsin Youth Company is organizing a grassroots advocacy movement to generate funding for organizations across the state.

- Bikes for Kids Wisconsin (formerly Free Bikes 4 Kidz)
- GSAFE
- Mentoring Positives
- RCC Sexual Violence Resource Center
- Sun Prairie Public Library Foundation
- The Playing Field
- Wisconsin Youth Company

Building a Legacy of Community Support

You can learn more about this year’s grant recipients on our website at madisongives.org/CI-grants.

If you would like to support the Community Impact Fund and be a part of supporting organizations like these, you can do so at madisongives.org/givetoCI.

Give Now, or Give Later?

Planning your giving for maximum impact

“Should I give now, or make a gift through my estate?”

People often ask this when trying to decide how to maximize their impact. Fortunately, the answer is, “You don’t have to choose.” Making a blended gift, one that combines creating a fund during your lifetime with leaving a legacy gift, allows you to experience the joy of giving today with the satisfaction of knowing you’re leaving a lasting charitable legacy.

Blended gifts can be structured in many ways, so you can build a plan that fits your needs and goals. Here is an example of how a blended gift plan might work.

1 Establish a Donor Advised Fund

You can establish a donor advised endowment fund at MCF for as little as \$15,000. You will receive the maximum allowable charitable deduction in the year you make your gift and can continue to contribute to your fund during your lifetime.

MCF can accept gifts of:

- **Cash**, which qualifies for a tax deduction (up to 60% of your adjusted gross income in 2023).
- **Appreciated public stock or mutual fund shares** qualify for a tax deduction based on their fair market value at the time you make your gift. Gifts of appreciated stock also are not subject to capital gains tax.
- **Complex assets**, such as real estate or privately held stock, also are deductible based on the fair market value at the time of the gift and are not subject to capital gains tax.

2 Make Distributions and Involve Your Family

Donor advised funds offer a great deal of flexibility to meet your giving goals. They also can lay the foundation for multi-generational giving, providing a vehicle for your heirs to continue the family’s charitable legacy into the future.

You can recommend distributions from your fund every year to nonprofit organizations locally or across the country. Your distributions can support the same organizations each year, or you can vary who you’re supporting.

Some people choose to make selecting which organizations to support a family endeavor, sharing their values and their philanthropic vision with their children and grandchildren.

You also can name a successor advisor (or advisors) to your fund, allowing future generations to carry on your family’s giving. (See page 7 to learn more.)

3 Maximize Impact With a Legacy Gift

Pairing an estate gift with your lifetime giving can maximize your charitable impact. Your advisor can help you structure the best plan for your circumstances.

Some strategies to consider include:

- **Using a beneficiary designation in your life insurance or retirement plan.** Funding your giving with these assets and using other assets for bequests can benefit your children or other heirs. How? Because retirement plan and life insurance proceeds are subject to taxes if left to your heirs, but pass tax-free to a nonprofit like MCF.
- **Making a bequest in your will.** You can either leave an outright dollar amount, a percentage of your estate, or designate the residual after bequests to your heirs have been fulfilled.

MCF’s philanthropic advisors are available to help you explore a wide range of options for achieving your giving goals during your lifetime and through your estate. Blending both techniques can allow you to enjoy the benefits of giving now while also ensuring a legacy of support for the causes you value.



Crafting a Succession Plan for Your Donor Advised Fund

Your charitable giving reflects your personal values. In addition to making a difference today, a donor advised fund can allow you to support the things you care about for generations to come.



Whether your long-term vision for giving involves other family members, ensuring support for your favorite cause or benefitting an entire field of interest, a donor advised fund can provide a simple and effective way to accomplish your goals.

Create a Succession Plan for Your Fund

As a permanent source of giving, your donor advised fund contains a succession plan that outlines how it will operate and what it will support after your lifetime. This flexible plan offers many options to meet your goals and can be changed at any time as your philanthropic priorities evolve.

Consider these succession plan strategies:

- **Name one or more successors.** Name a child, grandchild or trusted friend as successor so they can support their philanthropic priorities and experience the joy of giving. Your successor becomes the new account holder, able to make contributions and recommend distributions. In turn, they can name their own successor(s).

- **Establish a Field of Interest fund.** If your fund exceeds \$100,000, you can create a field of interest fund to support organizations working in a specific interest area such as the arts, youth, seniors, education or the environment. Each year, your fund will support the best opportunities to make a difference in your chosen area.
- **Designate one or more nonprofit successors.** Distributions from your fund will provide reliable annual income to support your chosen organizations indefinitely.
- **Appoint MCF as successor.** Designate either MCF's Priority Fund or Community Impact Fund as your successor, and each year your fund will support priority opportunities to benefit our residents and community, in perpetuity.

MCF's philanthropic advisors are available to help you update your donor advised fund's existing succession plan or to create a new plan that meets your goals and ensures that your legacy has an enduring impact.



Together, We've Given \$1 Million to End Hunger

At Thanksgiving, lifetime giving by MCF and its fundholders to Second Harvest Foodbank of Southern Wisconsin reached \$1 million!

Food insecurity is a problem for a growing number of people in our community. Second Harvest works to help alleviate hunger by providing free and reduced-cost food to partner food pantry organizations, who in turn, ensure that people in the community have nutritious food to eat and thrive.

This is just one of the many ways you are having an impact on our community through your generosity.

Save the Date

Madison Gives

Wednesday, May 8
Monona Terrace

Reception: 5:00 p.m.
Dinner and program: 6:15 p.m.

*Join us for an evening celebrating
philanthropy in our community.*



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

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



Meet the New Faces of MCF

In the fall of 2023, MCF welcomed three new people to the staff. Here's a quick introduction of our new teammates. You can get to know them better at madisongives.org/mcf-blog.

Beth Hedges is MCF's new Accountant. Previously, Beth was an auditor for nonprofit organizations in Atlanta, Georgia, and is excited to use her experience to support operations at MCF. Beth is a Southcentral Wisconsin native and is glad to return to her home state and explore the food, hiking and entertainment in Madison. She lives with her husband and two dogs, and the four of them can often be found at the dog parks around the city.

Kate Moser joined MCF as Accounting Director and is excited to be working in the nonprofit sector now. Kate uses her broad professional accounting experience to ensure MCF's financial health and integrity. She is a Madison native and has a deep love of Dane County. Kate enjoys entertaining, spending time with friends and family, reading, and exploring the outdoors with her dog, Lucy.



MCF's newest team members:
Nick Pjevach, Kate Moser and Beth Hedges.

Nick Pjevach is MCF's Donor Database Manager, helping process gifts and manage our donor and fundholder database. He previously worked for Arts + Literature Laboratory and the Wisconsin Foundation and Alumni Association. Nick is a lifelong resident of Southeast Wisconsin and came to Madison to pursue both his undergraduate and graduate degrees at UW-Madison. Outside of work, Nick chairs the Madison Arts Commission and is involved with the Greater Madison Music City initiative.