



Madison

COMMUNITY FOUNDATION

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madisongives.org

MCF Welcomes Jeneen Hartley as New Vice President of Community Impact



In November, Jeneen Hartley joined MCF as Vice President of Community Impact. Jeneen will lead the Community Impact team in working with nonprofit organizations, offering technical support and connecting them with funding opportunities both within MCF and beyond.

“Together we aim to guide MCF donors through the complex and essential issues shaping our communities and help strengthen organizations delivering high-quality programs that uplift the region,” Jeneen commented. “My work revolves around finding and enhancing ways to link donors with organizations having an impact, and supporting organizations using effective grantmaking strategies. We’re always looking for ways to maximize philanthropy’s impact. Think of me as part matchmaker, part cheerleader and part strategist.”

Jeneen comes to MCF with wide range of experience, having worked in education, the arts, human needs, public policy and community organizing. Jeneen was born and raised in the Twin Cities, but her path has taken her across the United States, from Washington, D.C., to Seattle, Boston, Florida, and most recently, rural Oregon. While in Oregon, Jeneen was deeply involved in improving K-12 public education systems through partnerships with local philanthropic institutions and state agencies.

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Building a Conservation Career Pathway

In 2022, Groundswell Conservancy and Operation Fresh Start received a \$45,000 Community Impact grant to create the Conservation Academy. In the last three years, 31 participants have gone through this paid training program to gain the necessary skills, experiences and certifications to be job-ready for entry-level positions in the conservation field.

Pictured is Academy graduate, Nathan, at his new job at Grand Canyon National Park.

Investing in the Future

**Article written in 2023*

The conservation field is populated predominantly by people who are white, upper-middle-class and older. Lack of diversity in the field, however, does not necessarily indicate a lack of commitment to conservation and the environment by people outside these traditional demographics. In fact, many under-represented groups, including low-income communities and communities of color, have a strong history of conservation. But the barriers to becoming conservation professionals are high and role models are few, making it a career that many people never even consider.

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Advisors: How to Talk About Legacy Giving

Starting the legacy giving conversation with clients can, at times, be a difficult subject. As an advisor who is genuinely invested in helping your clients achieve their lifetime and legacy goals (both charitable and noncharitable), MCF understands that this topic can be difficult. Here are some tips to help you start, and continue, conversations around legacy giving.

Tip 1: Be Proactive in Starting the Conversation

Data shows that a large percentage of advisors don't initiate any conversations with their clients about philanthropy, much less legacy giving. [A 2018 study of high net worth individuals and their advisors by U.S. Trust](#) found that 88% of the advisors surveyed believed it was important to discuss philanthropy with their clients. However, only 17% of the clients surveyed said their advisors had initiated these conversations with them.

If legacy giving is not something you have previously discussed with your clients, integrating it into your discussions may take time. As Phil Cubeta observed in our [February Advisor Blog post, Changing the Conversation About Planned Giving](#), "There's a step at the beginning, where you have to ask permission to shift to this more personal line of questioning."

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*Have an idea for a story?
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Get to Know Jeneen continued from page 1

“I’ve always loved the magic of collaboration. Joining MCF is an incredible opportunity to channel my nonprofit expertise into a dynamic organization focused on making Madison and its surrounding areas thrive. The best part is working alongside nonprofits and donors who care deeply about this community,” said Jeneen. “Every single day, I’m amazed by the passion, creativity and resilience of the people I meet. Making connections, finding common ground (or celebrating differences), and creating spaces for collective inspiration and action is what truly energizes me. People are at the heart of every success story — and that’s endlessly inspiring.”

Jeneen is excited to return to the Midwest. Although she is new to Madison, she already is grateful for the vibrant food scene, welcoming community and delicious cheese at every turn.

“My favorite spot so far is relaxing by Lake Monona, soaking in the sights of birds, waves, and all the lively activity around it,” Jeneen commented.

A proud animal lover, Jeneen lives with her dog Pete, who fills her life with love and laughter.

“Back in Oregon, I lived on a cozy ranchette with sheep, chickens, horses and dogs,” Jeneen said. “I’m excited to dive back into Wisconsin’s polo community and continue my love for wool crafts — spinning, weaving and knitting. When I’m not busy with that, you can find me planning my next travel adventure, whether it’s within the United States or overseas.”



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Dr. Mamie Parker, a biologist and conservationist who was the first African American woman to serve as the Assistant Director of Fisheries and Habitat Conservation at the U.S. Fish and Wildlife Service, said in an interview with The Nature Conservancy, “I never saw a Black person that actually did something like become an environmentalist or become a conservationist. Still, I was encouraged to be a scientist because of my grades. In college, I studied biology and eventually found conservation role models and started some internships in the Fish and Wildlife Service, and my career started shortly after that.”

Creating a Viable Path to a Conservation Career

Dr. Parker’s experience is hardly unique in a field where data shows that more than 90% of conservation scientists and foresters are white. That’s part of the void Groundswell’s new Conservation Academy is hoping to fill — making connections and providing role models to inspire a new generation and broader representation in the field.

“People of color or from disadvantaged backgrounds seeking to enter the conservation field often face multiple barriers,” says Jim Welsh, former executive director of Groundswell Conservancy. So before he retired, Welsh set out to change that with help with a grant from MCF.

“We’ve actually been talking about this idea for several years,” Welsh explained. “But after George Floyd was murdered, we wanted to move beyond just putting out a statement about condemning racism or supporting Black Lives Matter and actually do something about it.”

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Tapping into Groundswell's relationship with Operation Fresh Start, Welsh worked with Brian McMahon and Cory Rich to together develop a Conservation Academy. "Operation Fresh Start already has a conservation crew program," Welsh said, "but there wasn't a career pathway in place for the crew members who wanted to pursue a job in conservation."

Putting the Pieces Together

So McMahon and Rich began to develop the Conservation Academy curriculum while Welsh tapped into his contacts to find partners who could help provide an additional year of experience for the crew members.

The Academy will provide up to five crew members with four weeks of training on topics including chainsaw safety, pesticide application, prescribed burning and trail building. After completing their training, crew members will spend between seven and 12 months getting professional work experience with partner groups including Dane County, the City of Madison, the Wisconsin Department of Natural Resources (DNR), the UW Arboretum, The Nature Conservancy, the Ice Age Trail Alliance and Groundswell.

The Conservation Academy program is designed to not only provide the training and experience participants need to become job-ready, but also to help them develop professional networks. "When the crew comes and works for one of the sponsor organizations, they won't just be doing the work, they'll also be building connections in a field," Welsh explained. "Through those connections, they'll start hearing about job openings and will have references when they apply for those jobs. And they'll have the confidence to compete for the openings."

Getting to Work



Prescribed burn at Walking Iron County Park in Mazomanie with Dane County Parks.



October 2024: Conservation Academy crew helped remove invasive brush at Westport Prairie with staff from Groundswell Conservancy. Photos by: Brandon Mann

The first Conservation Academy began work this fall in partnership with the Wisconsin DNR, City of Madison, Dane County, UW Arboretum, The Nature Conservancy, Ice Age Trail Alliance and Groundswell Conservancy to complete important conservation projects at local parks, trails and natural areas.

The crew spent a chilly morning in January burning brush at Patrick Marsh in Sun Prairie. Crew member Zion Sanders, 19, of Cottage Grove, is happy to be putting his love of the outdoors to work. "I like to hunt and fish so this is a perfect fit for me," he says.

"This is important work," explains Welsh. "Our goal is to support an emerging generation of conservationists here in Dane County. Thanks to MCF for helping to make it work."



Advisors: Legacy Conservations continued from page 2

However, as Phil explains, “Amazing things happen when people are willing to embrace that moment in which we're called into a conversation with a client as a kindred human spirit. People will shock you with how different they are from what you assumed, and how much better they are, really! Good things happen when you create a space for you and your client to think things through together.”

Tip 2: Emphasize the Role Legacy Giving Can Play in Sharing Your Client's Values with Future Generations

Reminding clients of the impact legacy giving can have on their loved ones may encourage them to discuss it. Not only is legacy giving a way for clients to support the organizations and causes that are meaningful to them – it is also a powerful way for clients to share their values with their children, grandchildren and future generations. As Mark Weber explains in his book, [“A Spectrum of Legacies: The Gifts You Leave for Your Children and Community.”](#) establishing a legacy giving plan can “nurture your soul by giving back to your community and inspiring your children to do the same ... [it] provides a platform for inter- and intra-generational interaction.”

Tip 3: Connect Your Clients with Organizations and Resources That Can Help Them Explore Options

Remind your clients that they aren't alone in this process. While some of them may have a clear vision of their legacy giving plan, many don't. Reassuring clients that many people feel overwhelmed at the beginning of the conversation can go a long way toward getting them to engage.

In addition to your expertise, you can share a variety of other resources with clients who are looking for help developing their legacy plan. Mark Weber's book, referenced above, is an easy read with practical exercises to walk clients step by step through the legacy gift planning process.

MCF is also happy to be a resource to your clients as they develop their legacy giving plans. Our donor engagement team members frequently meet with donors and their advisors to discuss everything from how to translate their values into a giving plan to how specific giving options may impact their overall financial and estate plans. During these conversations, share insights and resources and encourage them to view us as a partner as they continue developing their legacy giving plans.

Tip 4: Move Legacy Giving to the Top of Your Meeting Agendas

We understand that legacy gift planning is one of many items on your client meeting agendas. However, if legacy gift planning is always the last thing on the agenda, it likely will be pre-empted by other items. Starting your meetings with a short check-in on legacy giving (even three to five minutes) ensures you are creating a space for your client to engage in the discussion. (Remember the data cited in Tip 1 above!)

We're Here to Help

If you or your clients have additional questions about legacy gift planning, we would be happy to help! Alison Helland, Director of Donor and Advisor Engagement, can assist you or refer you to another member of our Donor Engagement team to serve as a resource for your specific situation. You can reach Alison via e-mail at ahelland@madisongives.org or via phone at 608-446-5937.

Please note that this article has been prepared for informational purposes only, and is not intended to provide, and should not be relied on for, tax, legal or accounting advice.



Andy Davey Selected as Director of New Goodman Nonprofit Center at Madison Community Foundation

The start of programming at the Irwin A. and Robert D. Goodman Nonprofit Center is getting closer with the announcement that Andy Davey, former Director of Research & Advocacy at Madison Community Foundation, has been selected as the Center's new Director. Davey was chosen as the inaugural Director after an extensive search process.

"A committee of board and staff members interviewed many outstanding candidates for the position," said Bob Sorge, MCF President & CEO, "Throughout the interview process, Andy's knowledge of the local nonprofit landscape, his experience as part of the MCF Community Impact team, and his extensive research that precipitated the development of the Center, all made for a compelling and successful candidacy."

The Goodman Nonprofit Center will address a critical gap in professional resources for local nonprofit organizations. In the absence of a statewide nonprofit association, area organizations are left to piece together resources for professional development on their own. This adds to the challenges they face to advance their missions and realize their full potential.

The need for a nonprofit center in Greater Madison is well established. A joint study conducted by Davey and UW-Madison Extension Dane County's Sharon Lezberg, which engaged 80 nonprofits and was published in late 2021, concluded that the need for more in-depth capacity-building resources was a primary issue facing the local nonprofit field.

"The message from nonprofit leaders was clear," said Davey. "They want to learn from and with their colleagues in deeper ways and want to build peer networks that can support them through the often-intense ups and downs of the work. It was also clear that what was needed was a more centralized hub that could be a dependable source of information, professional development and collaboration across organizations."

[Center Director Announcement continues on page 7](#)

Curious About What Assets MCF Can Accept?

EXPLORE WAYS TO GIVE



Center Director Announcement, continued from page 6

Building a Resource to Enhance Nonprofit Excellence in the Heart of Madison

The Goodman Nonprofit Center will be located adjacent to MCF’s current offices, just steps from the capital at the top of State Street. This central location will facilitate the gathering of nonprofits from across Greater Madison and the surrounding areas.

“Given the lack of a nonprofit center regionally, Center programming will be available to nonprofits serving Dane, Iowa, Sauk, Columbia and Green counties,” Sorge explained. “Having an institution dedicated to building stronger nonprofits and improving collaboration across the field will significantly expand the efficiency and the effectiveness of the sector overall.”

Initial Programming to Launch in Late 2025

Beginning in late 2025, the Goodman Nonprofit Center will launch the Goodman Fellows Program – a year-long professional leadership development training program for nonprofit leaders. Goodman Fellows will belong to a cohort that will learn together and build relationships as they enhance their skills in financial management, strategic planning, fundraising, marketing and communications, advocacy and other areas.

The Nonprofit Center also is planning to develop an online resource library, a calendar of local workshops and a consultant directory, and will provide space where organizations can gather to collaborate. Additional programming and resources are anticipated as the endowment that supports the Center grows.

Major Funders Helping Make Vision a Reality

The Irwin A. and Robert D. Goodman Nonprofit Center moved from vision to reality in May 2024, when the Irwin A. and Robert D. Goodman Foundation announced a \$5 million grant to create an endowed fund to support the new Center at MCF. Since then, the Roots & Wings Foundation and United Way of Dane County have joined the Goodman Foundation and MCF as Founding Partners in the Center, building the endowment and expanding programming.

“One of the many challenges of the nonprofit field is the lack of access to professional development,” said E.G. Schramka, Executive Director of the Irwin A. and Robert D. Goodman Foundation. “We hope other funders will join us in supporting this new resource for the Greater Madison area.”

Upcoming Dates to Remember

FEB 12	AFP Greater Madison Lunch & Learn Join MCF’s David Koehler and Camille Zanoni as they present Building Your Organization’s Legacy Giving Program. <u>Register Today!</u>
MAR 04	The Big Share The Big Share online day of giving hosted by Community Shares of Wisconsin is March 4th.
MAY 20	SAVE THE DATE: Madison Gives 2025 Stay tuned for registration information for Madison Gives, MCF's annual celebration of impact and philanthropy in the Madison Community