

# Madison Gives

Spring 2022

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## Mission

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



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# CREATING MOMENTUM

If you've ever read "Good to Great," one of my all-time favorite reads, you will be familiar with the concept of the flywheel and momentum. My novice's description of a flywheel is that it's a big, heavy wheel that stores kinetic energy (energy that is released when the wheel is in motion). While you have to use energy to get that flywheel moving in the first place, at some point the energy and momentum it creates far surpasses what you put into it.

That's how I think about organizational development.

You have to know what sort of value you bring to the table, and you have to align all your energy behind that value and start pushing. If you don't know what that value proposition is, or you haven't aligned things well, then you'll have friction that either slows the wheel down or stops it completely.

Madison Community Foundation's (MCF's) value proposition puts donors at the heart of the conversation — helping them create their charitable legacy for the community they love. Sometimes they know specifically what they want that legacy to be, and sometimes they defer to MCF. In both cases they are creating momentum for good.

In 2021, MCF board and staff awarded just over \$2 million in grants, and our fundholders advised \$28 million. As I read the stories in this newsletter, I think of the energy coming off that spinning flywheel: the momentum created by access to careers in conservation, thanks to Groundswell and Operation Fresh Start aligning their programs; the additional resources available to nonprofits by MCF lowering its fees; the power of education facilitated by scholarships from the Sheahan family; and the momentum created by two former MCF Board Chairs who embraced MCF's value proposition and lent their shoulders to the wheel. Thanks to all of you for the momentum you add to make our community thrive.

Bob Sorge  
President and CEO



## KEEPING THE CELEBRATION SAILING, DESPITE COVID

Lois Curtis is an active member of SAIL (Sharing Active Independent Lives). One aspect Lois particularly enjoys is the SAIL Over 90 Group's Social Gatherings. So in 2018, she made a gift to the SAIL Endowment Fund to help keep these activities funded.

While COVID disrupted the group's regular breakfasts, Lois (who is going to turn 101 this year) wasn't deterred. She came up with the idea to have Clasen's Bakery in Middleton deliver morning buns to the group. Clasen's insisted on donating the buns and eight volunteers delivered them to the 60+ members of SAIL's Over 90 Group.



# MCF IS REDUCING FEES – AGAIN!

When a person or an organization builds an endowment fund at Madison Community Foundation, they do so in part because they are joining something that transcends their individual charitable interests or their organization’s mission. And fees play a role in that.

## Fees Help Build a Stronger Ecosystem

The fees our fundholders pay cover the cost of administering a fund. But more importantly, they support MCF’s work to make the community a vibrant place where all people thrive. This support helps strengthen the larger ecosystem in which your charitable work unfolds.

And a stronger ecosystem benefits you – our fundholders.

How? Your support allows MCF to stay abreast of developments in philanthropic giving, tax laws and estate planning, and to share those insights with donors and potential donors to your organization.

Your support also allows MCF to convene organizations for sharing and learning – learning that benefits nonprofits across the city and throughout the region. It allows us to foster collaborations that accelerate impact.

Your support helps MCF take advantage of opportunities like turning a \$69,000 investment in census outreach into an additional \$21 million in federal funding in Dane County over the next 10 years. Or helping nonprofit organizations access federal Paycheck Protection Program loans, leveraging a \$50,000 investment into more than \$27 million in forgivable government loans.

## Building Our Own Endowment to Be More Self Reliant

We are proud of the work we do to create positive change. And as MCF’s Administrative Endowment continues to grow through contributions and investment returns, we now are able to support a greater share of our operational needs through our own endowment.

In 2016, MCF implemented a tiered fee structure, which reduced fees on larger funds. We recognized then that as an endowment grows it becomes more efficient to operate and the new fee structure reflected that. We have continued to operate with an eye toward reducing fees further since then.

The support our fundholders provide is vital to MCF’s success in strengthening our community. But we also want our fundholders to have more resources to support their unique charitable interests and missions. So we have lowered the tiers in our fee structure to benefit more fundholders.

Thank you for choosing to be part of this larger ecosystem. Thank you for helping to create a vibrant and generous community where all people thrive – through your individual efforts and through your commitment to the community’s foundation.

## ADVISED FUND FEE SCHEDULE

*Donor Advised Endowments, Maximum Giving Funds, Supporting Organizations*

| Consolidated Fund Values |               | Fee Rate |
|--------------------------|---------------|----------|
| First                    | \$500,000     | 1.00%    |
| Second                   | \$500,000     | 0.80%    |
| Third                    | \$500,000     | 0.60%    |
| Fourth                   | \$500,000     | 0.40%    |
| Fifth                    | \$500,000     | 0.20%    |
| Balances over            | \$2.5 million | 0.10%    |

## DESIGNATED FUND FEE SCHEDULE

*Designated Agency Endowments, Donor Designated Endowment*

| Consolidated Fund Values |              | Fee Rate |
|--------------------------|--------------|----------|
| First                    | \$2 million  | 1.00%    |
| Second                   | \$2 million  | 0.80%    |
| Third                    | \$2 million  | 0.60%    |
| Fourth                   | \$2 million  | 0.40%    |
| Fifth                    | \$2 million  | 0.20%    |
| Balances over            | \$10 million | 0.10%    |

# INVESTING IN THE FUTURE

## Groundswell Conservancy Spearheads a New Program with Operation Fresh Start



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.

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<sup>1</sup> 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%<sup>2</sup> of conservation scientists and foresters are white. That’s part of the void Groundswell’s new Conservation Graduate Crew 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.”

Tapping into Groundswell’s relationship with Operation Fresh Start, Welsh worked with Brian McMahon and Cory Rich to together develop a Conservation Graduate Crew. “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 Graduate Crew curriculum while Welsh tapped into his contacts to find partners who could help provide an additional year of experience for the crew members.

The Graduate Crew 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 itself.

The Conservation Graduate Crew 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

The first Conservation Graduate Crew 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.”

<sup>1</sup> <https://www.nature.org/en-us/magazine/magazine-articles/talking-about-conservation-and-racial-justice/>

<sup>2</sup> DATA USA reports that in 2019, 94% of conservation scientists and foresters were white: <https://datausa.io/profile/soc/conservation-scientists-foresters>

# MANY THANKS TO OUR OUTGOING BOARD MEMBERS

MCF thrives in part because of the contributions of the many talented people who volunteer to serve on our Board of Governors. We would like to thank our outgoing Board members for their generous support over the past several years. Their guidance has been valuable beyond measure.

**Enid Glenn**, who retired in 2017 as Deputy Administrator for the Department of Workforce Development's Division of Vocational Rehabilitation, served as Chair of the Board of Governors from 2019 to 2021. She also served on the Donor Engagement Committee and is a past member of the Executive Committee of A Fund for Women.

**Blaine Renfert** is General Counsel with Sub-Zero Group and a graduate of Leadership Greater Madison. He has been on the Board of Governors since 2012, serving as Chair from 2015 to 2017. Blaine also has served on MCF's Investment Committee, a role in which he will continue to serve after stepping down from the Board.

"We are so grateful to Enid and Blaine for their time, effort and commitment to MCF," Bob Sorge, President and CEO, shared. "Each brought something unique and valuable to the role as stewards of the community's foundation. Thank you!"



Enid Glenn



Blaine Renfert

## AMPLIFYING WOMEN'S VOICES IN THE NONPROFIT FIELD

Madison is home to a thriving nonprofit community. But even so, not everyone has an equal opportunity to take on leadership roles. In 2017, as part of our 75<sup>th</sup> Anniversary celebration, MCF awarded a grant to YWCA Madison to create a program to increase the skills, visibility and opportunities of women in local nonprofits. Amplify Madison focused on women of color who were nonprofit professionals, board members or volunteers and wanted to grow professionally and give back to their communities.

Since then, Amplify Madison has helped three cohorts of women – 60 in total – collaborate, design and participate in a professional development opportunity of their choice, and engage with their community in new ways. These women increased their knowledge and fostered relationships and collaborations with other nonprofits. And in the process, they also amplified their voices in the community.

"We were very excited to host such a great opportunity to empower women in the Madison area," said Vanessa McDowell, CEO of YWCA Madison. "Our entire community is enriched when we make it possible to build stronger relationships and have more diverse voices sharing knowledge."



### Refusing to Let the Pandemic Stop Them

"The pandemic created unforeseen obstacles and challenges to a project that requires in-person engagement," McDowell said. But while the pandemic made the original vision of Amplify Madison no longer feasible, the YWCA adapted the program to allow the third and final cohort of 24 women to participate.

Christine Russell is part of that third cohort. The experience helped her launch Mahogany Rooted in Wellness and learn from other women in the nonprofit community. "This is just the start of our journey," she shared. "We look forward to continued collaboration and connection as we all work together to make Madison a more empowered, well community."

# HONORING THEIR SON BY HELPING OTHERS

Pat and Helen Sheahan's son Michael was one of two applicants tied for a state-sponsored scholarship. The decision of who received the scholarship was decided by a coin toss; Michael lost.

Fortunately, losing the scholarship didn't prevent Michael from attending the University of Pennsylvania to study engineering. But the memory of losing the scholarship by something so random stayed with the Sheahan family.

Michael never got to finish his engineering degree. He died in a car accident in 2008 before starting his sophomore year at the University of Pennsylvania. To honor his memory, and to make additional scholarship opportunities available, the Sheahan family decided to create the Michael Sheahan Memorial Scholarship.

"When Michael died, a large portion of my vision of our future died," Helen said. "This scholarship in his name has become a way we can keep alive what Michael might have accomplished in his life."

"We established this scholarship to help other people," Pat added, "but we've found they are helping us more than we're helping them."

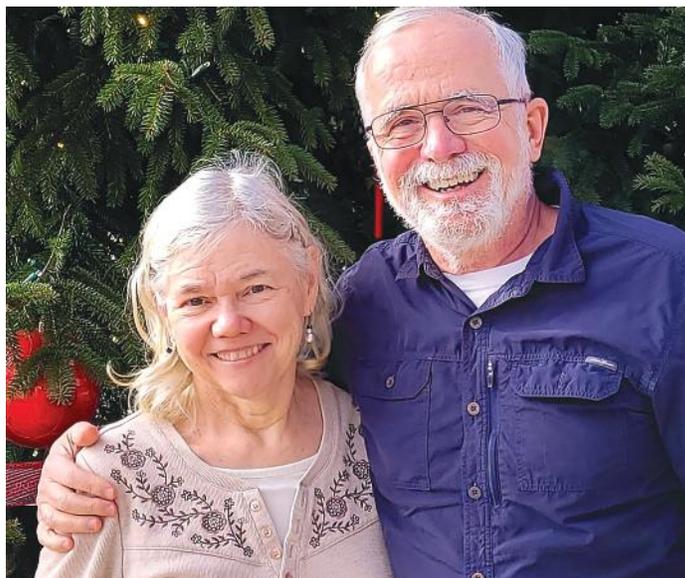
## Providing a Path to a Better Life

Pat and Helen both grew up in rural Wisconsin and received scholarships that helped them go to college. Today both are retired, but they recognize that education is the clearest path to a better life.

Unlike most scholarships, which only apply to a student's first year, the Sheahans' scholarship provides funds for four years of college. No specific grade point average is required to keep the scholarship because, Pat said, "We felt kids should have an ability to find themselves. We don't want a kid to be scared that if he takes a risk, he's going to lose his scholarship."

Each year the recipient is chosen by the staff at Memorial High School, where Michael was a student. They look for students with leadership potential who are highly regarded by their teachers and peers, but who may have missed out on other scholarships by the equivalent of a coin toss, as Michael had.

To date, the Michael Sheahan Memorial Scholarship has funded 13 students.



## Building a Connection

The Sheahans meet each year's recipient and his or her parents and stay involved in their lives.

Helen said, "A four-year scholarship allows time to get to know them. We're interested in the classes they take, how they are faring during COVID." Several times a year Pat and Helen go out to dinner with each recipient and their parents.

The annual Berbee Derby fun run has become the strongest tradition connecting the Sheahans with the young people they support. "We realized that kids come home from college at Thanksgiving," Helen explained. "We decided to invite the kids and their families to participate." The Sheahan family now has the largest non-company Berbee Derby team. It's an extended family affair for the Sheahans as well, one that honors Michael's memory.

## Growing the Fund With a Legacy Gift

Pat and Helen chose to establish their fund at MCF "because they are warm, caring people who are willing to work with us and meet our needs," Pat explained. They have endowed their fund so that the scholarship will continue to be awarded long into the future.

Pat and Helen plan to further fund the scholarship as part of their estate plan, by naming it as beneficiary of a portion of their individual retirement accounts.

Pat said, "These kids are going on to do great things in their lives. It is a joy to be a small part of that. Missing Michael is a little less hard because of the scholarship recipients and our relationship with them."



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Please join us for  
**Madison Gives**

Celebrating Philanthropy & Impact

**Tuesday, May 24th | Monona Terrace**

**Reception: 5:00 p.m. | Dinner & Program: 6:00 p.m.**

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