



Madison Gives

FALL NEWSLETTER 2018

The Power of Porchlight

Grants to reduce homelessness provide more than just shelter

Page 4

Double Your Gift!

Support your community and receive a 100% match

Page 2

Tax-Smart Giving

Year-end giving with new tax laws in place

Page 3



"I want to pay it forward so other children have libraries for their lifetimes."

Page 6





Mission

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



Excellence. Accountability. Impact.™



Board of Governors

- Diane Ballweg, Chair
- Enid Glenn, Vice Chair
- Jeff Bartell
- Shiva Bidar
- Frank D. Byrne
- Jim Cavanaugh
- Jack E. Daniels III
- Al Friedman
- Roberta Gassman
- Rich Lepping
- Ron Mensink
- Ismael Ozanne
- Blaine R. Renfert
- Christine Rew Barden
- Dave Stark
- Martha A. Taylor

DESIGN & PRINTING



MEASURING THE IMPACT OF GIVING

A note from president Bob Sorge

Welcome to the fall "Impact Issue." Recently, I was fortunate to co-present a seminar with Ed Henry, president of the Doris Duke Foundation (DDF), to students from the Bolz Center for Arts Administration at UW-Madison. Ed and I talked about the importance of measuring impact—and yet the difficulty in doing so given the variety of programs our institutions fund.

For instance, DDF is a \$2 billion force for good that has given out \$1.7 billion in its first 20 years—and is worth twice as much today as when it started in 1997 (a great example of the power of an endowment). Within that \$1.7 billion, among well over 1,000 grants, are the conservation of 2.5 million acres; 30 million views of an Emmy nominated film, "The Secret Lives of Muslims," intended to create cross-cultural understanding; and \$300 million in medical research, including the breakthrough technology that helps people who have been paralyzed move robots with their minds.

How do you measure the impact of 30 million views of a film created to produce cultural understanding? These are the questions we grapple with at MCF because we are committed to achieving impact, and measuring it, elusive as the latter may be.

In this newsletter you will read about the impact of some of our most inspiring and effective nonprofits, including **Operation Fresh Start**, **Porchlight**, **Bartell Theatre**, **DANEnet**, and **Earth Science Women's Network**. Gifts to MCF's Community Impact Fund make this type of impact possible.

Thank you for all you do for our community, and enjoy the upcoming fall season.

DOUBLE YOUR GIFT DURING MCF'S ANNUAL CAMPAIGN! By David Koehler

Because of donors like you, each year, Madison Community Foundation gives approximately \$2 million to important local causes through our Community Impact and Field of Interest funds.

These are permanent endowments at MCF that help enrich our quality of life in Dane County, supporting nonprofits in a variety of areas.

Operation Fresh Start (OFS) is one of those organizations, and has an extraordinary internship program. OFS participant Ekiyah (pictured) spent part of last summer learning how to mill wood at the Wood Cycle in Oregon, Wisconsin. The opportunity was made possible by a \$75,000 MCF grant to repurpose Madison's Ash trees, which have been decimated by the Emerald Ash Borer. Once milled, the trees are donated to local nonprofits for construction projects, to high schools for woodworking classes, and to local artists for sculptures and installations.

This is the type of program made possible when our community comes together for good.

OFS participant Ekiyah learns how to mill wood at the Wood Cycle in Oregon, Wisconsin.

Together with our donors, MCF has given more than \$200 million in the last 25 years.

We invite you to help expand this work by making a gift to support MCF endowment funds today.

DOUBLE YOUR GIFT! Thanks to generous challenge grants totaling \$50,000 from two anonymous donors, gifts from new and existing donors to MCF's Priority, Community Impact or Field of Interest funds will be matched 100%. *Some restrictions may apply.**

Please see the enclosed envelope or visit us online for details and double your gift today! ■

**\$25,000 matches all gifts/\$25,000 matches the first \$100 received from each new donor to these funds.*



A “BUNCH” OF TAX PLANNING IDEAS

MCF’s donor advised funds offer end-of-year giving solutions *By Ann Casey*

With the new tax laws in place, are you among those who will no longer itemize due to state and local tax deduction limits (\$10,000 per year) and the doubling of the standard deduction (\$12,000 for individuals and \$24,000 for married couples)?

It sounds attractive—“tax simplification”—but you may be leaving some tax benefits on the table. With a few easy steps, you can maximize the impact of your deductions by “bunching” them into one year, when you itemize deductions. In other years, you claim the standard deduction. In total, you claim more deductions than you would if you simply took the standard deductions every year.

The simplest way to explain this is to compare bunching to the do-nothing plan of paying the same deductible expenses every year (see chart). Just timing when you make charitable contributions will produce more total tax benefits. One way to do this is to double your contributions to your favorite charities in the year you plan to itemize deductions.

However, if you are concerned about how this will impact the budget of the charities, or if you think of other charities you wish to support but

you didn’t plan to itemize that year, Madison Community Foundation can help.

A contribution to a MCF donor advised fund is deductible in the year you make it. You can then choose the time to recommend distributions from the fund. This is a great way to claim a tax deduction immediately for supporting your favorite charities in the future. ■



BONUS PLANNING IDEA:

If you are 70½ or older, you are eligible to make charitable contributions directly from your Individual Retirement Account. These gifts help satisfy your required minimum distribution for the year and reduce your taxable income, even if you don’t itemize deductions. IRA distributions cannot go to donor advised funds, but they can be made to any other MCF fund or directly to your favorite charities.

As always, everyone’s tax situation is unique and you should consult your own tax advisor before employing any tax planning strategy.

	PAY SAME EVERY YEAR		BUNCHING DEDUCTIONS	
	YEAR 1	YEAR 2	YEAR 1	YEAR 2
Taxes	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000
Mortgage interest	7,000	7,000	7,000	7,000
Charitable contributions	6,000	6,000	12,000	-
TOTAL	\$ 23,000	\$ 23,000	\$ 29,000	\$ 17,000
Standard deduction				
	\$ 24,000	\$ 24,000	\$ 24,000	\$ 24,000
Actual deduction				
	\$ 24,000	\$ 24,000	\$ 29,000	\$ 24,000
TOTAL DEDUCTIONS OVER 2 YEARS				
	\$ 48,000		\$ 53,000	

“With a few easy steps, you can maximize the impact of your deductions by ‘bunching’ them into one year...”



ON THE COVER:
Dilly beans are among the many local foods available at Porchlight Products, a thriving vocational rehabilitation program for people who are disabled and formerly homeless. See story on page 4.
Beth Skogen Photography

WATCH THE VIDEO:
See the impact of Community Impact grants to support Porchlight Products and other nonprofit initiatives. Visit madisongives.org/videos.

CONNECT WITH US!



CHECK OUT THE GREATER MADISON NONPROFIT DIRECTORY:

Courtesy of CUNA Mutual Group Foundation’s endowment at MCF, at madisongives.org/npdirectory.



THE POWER OF PORCHLIGHT

A series of capacity building grants has helped people experiencing homelessness find stability and employment

Porchlight resident Wil Ayote is a graduate of the Veteran Transitional Housing program and one of the original Porchlight Product employees.

The causes of homelessness are well documented—the top three are poverty, violence or threat of violence, and mental health. Porchlight, Madison’s largest nonprofit provider of housing and services, considers these barriers insurmountable for many people who encounter them and views long-term support as the solution. Madison Community Foundation’s partnership with Porchlight is long-term as well. Community Impact grants for capacity building projects date back to 1991, from renovating the drop-in shelter, to helping two agencies merge to become Porchlight, to launching the DIGS program to prevent eviction.

Porchlight Products is among the many successful programs MCF has helped pilot. In 2005, with a grant from the Community Impact Fund, Porchlight piloted an innovative idea to create jobs for people with disabilities, use locally grown food, and provide an additional revenue stream. In

2007, MCF funded the launch of the program, which hired six people with disabilities who were formerly homeless and established relationships with three local farms and eight restaurants.

In 2014, Porchlight embarked on a \$4.5 million capital campaign to build an east-side campus with 28 housing units, a commercial-grade kitchen for Porchlight Products, a separate kitchen for Madison Area Urban Ministry’s Just Bakery employment training for returning prisoners, and a maintenance service center for all of its properties.

“The gift from the Community Impact Fund was at the beginning of that capital campaign, so it gave the campaign momentum and credibility,” said executive director Karla Thennes.

In 2017, the new location opened with the help of an additional grant from MCF to furnish the apartments and purchase kitchen equipment. Also last year, Porchlight



WHERE TO BUY PORCHLIGHT PRODUCTS
The American Gift Shop at UW Health • Basic Cooperative (Janesville)
Brennan's Cellars • Capitol Centre Foods • Festival Foods • Hy-Vee
Metcalf's Market • Miller & Sons • Regent St. Co-op • The Sow's Ear
Unity of Madison • Willy Street Co-op

PORCHLIGHT'S IMPACT BY THE NUMBERS

Products employed 25 individuals in its training program. Today, Porchlight Products is a thriving vocational rehabilitation program. Jams, pickled items, and dry baking mixes—12 products in all—are in 16 different retail locations and on the menu at 12 local restaurants. Other programs MCF has supported are the launch of the Veteran's Transitional Housing project, which renovated a building and houses up to 24 veterans who were formerly homeless, and a new facility for Safe Haven, a drop-in shelter and transitional residence that has served nearly 900 clients. After Safe Haven's federal funding was cut last year, MCF funded a campaign to keep the facility open. Thanks to the foresight of donors who've left unrestricted gifts to MCF, the Community Impact Fund will continue to partner with Porchlight on innovative solutions to fight homelessness in Dane County. ■

- 51** veterans served by the Veterans Transitional Housing program in 2017
- 58** people housed at Safe Haven in 2017
- 532** evictions prevented by DIGS program
- 97%** of Porchlight households receiving case management maintain stable housing for a minimum of 12 months
- 32,569** nights of shelter provided in 2017
- 24,820** number of meals volunteers have prepared and serviced since the men's shelter inception
- 50 LBS** amount of sauerkraut Memorial Union has purchased per week since May 1, resulting in the need to buy more cabbage from local famers and hire more individuals

MASTER PLANNERS

Madison Public Library Foundation has never wavered in its original plan to commit 10 percent of its annual fund to build a permanent endowment at Madison Community Foundation.

Twenty-five years later, MCF stewards 13 endowment funds for MPLF—one for each of the nine libraries, the general endowment, and three funds established by donors. Last year alone, the endowment funds distributed more than \$182,000 to support collections, technology, and professional development.

Another key decision the foundation made is to direct 100 percent of donor bequests through wills and estate plans to library endowments held at MCF.

Anne Iwata took advantage of this opportunity as part of MCF's 75th Anniversary campaign, which welcomed over 100 new Legacy Society members.

"I got my first library card when I was eight years old," says Anne. "It was always special to go to the library after the grocery with mama. She knew I loved to go to the library. I still look forward to picking up 'my' books, music and videos."



Anne's choice to leave a gift to MCF through her estate plan will provide permanent support for libraries.

"Seeing the names of friends who are Legacy Society members or have established funds made me act," she says. "I want to pay it forward for Madison friends by establishing a legacy endowment fund so that other children have libraries for their lifetimes." ■

Please contact MCF donor services at 608.232.1763 or legacy@madisongives.org to learn more about legacy giving.

LIBRARIES BY THE NUMBERS

Over the last decade, MCF and its fundholders have given **\$7,933,458** in grants to libraries
MCF stewards over **\$9 million** in library endowments in Dane County and beyond

2018 LEGACY SOCIETY LUNCHEON



Our largest group ever—130 Legacy Society members came together to connect and learn how planned gifts impact our community, and enjoyed a behind-the-scenes tour of Overture Center!



Clockwise top right: Behind-the-scenes tour of Overture; Overture's Glenn Weihert and George Austin; Al Friedman, Karla Thennes, Tom Linfield; Angela and Jeff Bartell, Brennan Nardi; Liz Disch and Karen Lockard; Tony Earl, James Tye, Jane Earl; Jane Earl; Diane Ballweg with members of Wisconsin Youth Symphony Orchestra

ALL IT NEEDS IS LOVE

A series of Community Impact grants give the Bartell Theatre a fresh new look and feel for actors, stage crews, and patrons alike



Actors Carrie Sweet and Jalen Thomas star in Madison Theatre Guild's "A Behanding in Spokane"

The **Gerald A. Bartell Community Theatre**, one of Madison's most beloved performing arts facilities, is quietly undergoing a renovation project funded by Madison Community Foundation.

The collaborative improvements initiative is enhancing the theater-going experience for patrons while improving the safety and quality of the 112-year-old building and its aging equipment for the six presenting companies that call it home: **Madison Ballet, Madison Theatre Guild, Mercury Players Theatre, StageQ, Strollers Theatre, and Kathie Rasmussen Women's Theatre (KRASS)**.

Starting in 2014, a \$25,000 capacity-building grant enabled the Bartell to begin its work in three major areas: digital lighting control, marquee operation and maintenance, and lobby/concession stand.

Subsequent grants in 2017 and 2018 to complete the work will keep ticket prices affordable and increase production values of theater and other events, such as weddings and benefits, which account for some 10 percent of the facility's revenue stream. Updates to the marquee and its electrical system—in place since the 1970s—will make it safer to operate and more attractive.

"In total, \$43,000 has made a difference," said executive director Kirk Stantis. "We would not be where we are now without these grants."

MCF is also partnering with the Bartell thanks to a \$150,000 gift from an anonymous donor to establish the **Bartell Community Theatre Endowment**, ensuring permanent support for community theater long into the future. ■

THIS IS WHAT LOCAL GENEROSITY LOOKS LIKE:

950 The number of grants awarded from all funds so far this year
for a grand total of **\$6.5 million**

UP FOR THE CHALLENGE



Lodi Area Community Endowment (LACE) volunteers are raising money and visibility through the "\$150,000 Challenge" as part of its 10th anniversary celebration in 2019. With a \$50,000 challenge grant from MCF, an anonymous donor's \$25,000 gift, and dozens of other gifts, LACE will have a lot to celebrate next year!

Earth Science Women's Network (ESWN), an international peer-mentoring network headquartered in Madison, is helping women overcome barriers to success in science. A \$50,000 challenge grant from MCF to establish an endowment fund has helped raise over \$75,000 toward ESWN's \$150,000 goal.



INTERNET FOR ALL

DANenet's vision is to make Dane County the most connected community

in the country for everyone. To help reach the goal, a \$30,000 Community Impact grant supports the nonprofit's "Everyone On Madison" program, which in 2017 provided connectivity to 603 households, classes to 326 adults, 282 computers to low-income households, and fix-it clinics for 128 devices.

"Madison Community Foundation's support of this project has been critical to our success in providing broadband adoption, low-cost-devices, digital literacy, and ongoing technical support to low-income families."

– Alyssa Kenney, Executive Director





Madison
COMMUNITY FOUNDATION

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

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

SAVE THE DATE!

A Fund for Women 25th Anniversary
Tuesday, October 9, 5–8 p.m.
The Edgewater Hotel

\$85; \$650 per table; \$1,000 sponsor table
Register at madisongives.org/affw2018

**Columbus Area Endowment's
Celebration of Philanthropy by Youth**
Sunday, November 4, 2 p.m.
Savanna Oaks Community Center

For info contact Henry St. Maurice at
hstmaurice@me.com

Madison Community Foundation Presents:
Madison Gives 2019
Tuesday, May 21, 5–8 p.m.
Monona Terrace

Stay tuned for details!

LEAVING A LEGACY

Donna Beestman

When Madison Community Foundation invited 75 people to join the Legacy Society to celebrate its 75th Anniversary last year, Donna Beestman decided the timing was perfect.

"It feels so good to be working with others to make an impact," says Donna, who left a gift to A Fund for Women

“It feels so good to be working with others to make an impact.”



that will support the donor advised fund she started in 2009. "I know that after I'm gone that work will continue, and I have full confidence that there will be great stewardship of the funds and the grants selection process will respond to the needs of the community at that time."

While Donna and her husband, George, spent three decades raising their family and building their careers in Missouri and then Delaware, they returned home to Madison in 2002, where Donna grew up on the west side and where the couple met on a blind date.

In 2005, after successful careers as a librarian, a nonprofit executive director, a career consultant, and a senior vice president for business development, Donna launched her own business. Career Success Strategies offers career consulting and executive coaching for senior professionals and executives.

Twenty-five years ago, Donna was a founding donor to the Delaware Community Foundation's Fund for Women, and is excited to see MCF's A Fund for Women celebrating the same anniversary this year.

"I just think it's important for women to think of themselves as contributors in philanthropy," she says. "And when you impact the life and development of a girl or a woman, you're also impacting her family and her community. The ripple effect is profound." ■