So, You’re Celebrating an Anniversary. Now What?

Madison Community Foundation
Tom Linfield, David Koehler, Brennan Nardi
Three-Pronged Strategy:
Community Impact
Donor Engagement
Communications
Ask Yourself Questions

What’s unique about your community? What would you like to strengthen / celebrate?

What are you trying to accomplish? What are your institutional priorities?

How much money will you invest? Over what time period?

Who will do the work? Where will you need help?
Foundation Snapshot

- Established in 1942
- Serve Dane County, Wisconsin
- 1,118 Funds
- $257 million in assets
- $1.1 million in unrestricted grantmaking
- 13 staff
Community Profile

- Madison population: 250,000
- Dane County population: 500,000
- 501(c)3 nonprofits: 2,900
- Madison is the State Capital
- Biggest industries: University of WI, State government, health care
- Urban and rural communities
Dream (and Dream Early)
MCF Anniversary Goal:

To dramatically raise the awareness of, affinity for, and affiliation with Madison Community Foundation across the greater Madison area.

In particular – connect to the individuals, organizations and businesses that have the greatest capacity and inclination to join us in building a better community.
Community Impact Strategy:

Unveil a major, newsworthy gift to the community every month – gaining momentum and heightening awareness throughout the year.
Community Impact Process
Generating, winnowing, pursuing Ideas
Spring Ideas

Please rate each of the following ideas on a scale of 1-5, where 1 is an idea you find Not Compelling, and 5 is an idea you find Very Compelling. n=14  Top 2 Box rating

- Park Pride
- The Learning Bus
- Invest in Women
- Plant Madison
- 75 Community Picnics
- Bikes for Books
- Gateway Gardens
- Community Point
- Trees for a Causeway
- Street Ball
- Head of State
- Iconic Art
- Park Stories
- B-Cycle in the Community
- Cultural Connections
- All Aboard Madison
- Bike Path Rest Areas
- Madison's Environmental Roots
- Camp Randall Honors

0% 10% 20% 30% 40% 50% 60% 70% 80% 90%
Evolution Madison - Nolen Waterfront
Back to the Beach
Capitol Century - Madison Children’s Museum
Women Artists Forward Fund

John Miller, "Wisconsin Moving Forward"
First Nations Heritage Tour
Ideas That Got Away

Volunteer Center purchases bus for Do Good Bus initiative

From left: Dan Johnson of Johnson School Bus Service, Inc., Sue Millin, executive director of the Volunteer Center, and Katie Evans, president of the board of directors of the Volunteer Center, pose in front of the bus purchased from Johnson Bus that will be used in the Volunteer Center’s Do Good Bus initiative.
Lessons Learned in Grantmaking

Agencies will surprise you
You can’t have it all
This is a springboard for the future
Flexibility is your friend
75 Years of Giving
Legacy Criteria

Endowment and Documentation
Tell Us About Your Legacy Gift
Statement of Intent

Thank you for your generous commitment to Madison Community Foundation (MCF). To better understand your intentions for this gift, we ask that you please complete this form with as much detail as you are comfortable sharing. The information you provide is not legally binding and we understand that you may wish to change your gift in the future. Questions? Please call MCF at 608.232.1763

Your Contact Information

Name(s) ____________________________________________

Address ____________________________________________

City _________________________ State ________________ Zip ____________

Phone ___________ H ☐ C ☐ W ☐ Email ☐

You will receive occasional email updates from MCF. We will not sell, rent or exchange your email address

About Your Gift

If you are willing to disclose information about your gift, please check all that apply. If you choose to provide an estimate of the value of your gift, please use today’s dollars:

☐ Will ☐ Trust ☐ IRA or Retirement Plan Assets ☐ Charitable Remainder Trust

☐ Life Insurance Policy ☐ Charitable Gift Annuity ☐ Other: ____________________________

*The approximate value of my gift is $ ___________ or ___________ % of my estate or residue. (Optional)*

Your Gift Will Support

☐ Highest priorities of MCF (Unrestricted)

☐ Community Impact Fund (Broad community support in MCF focus areas)

☐ An existing Agency or Field-of-Interest fund held at MCF ____________________________ Fund name or number

☐ Your existing named fund held at MCF ____________________________ Fund name or number

☐ A new named fund (MCF will contact you for details)

☐ Other: ____________________________

Acknowledging Your Gift

☐ I/We would like to be included in the Legacy Society. Please list my/our name(s) as:

________________________________________

☐ Anonymous ☐ If anonymous, you may publicly recognize my/our gift once it is realized

Signature(s): ____________________________________________ Date: ____________________
Past and Present Leadership
In honor of your new legacy commitment and MCF’s 75th Anniversary in 2017, a member of MCF’s Board of Governors will contribute $1,000 in your name to support MCF’s Community Impact Fund.

MCF’s Community Impact Fund awards competitive grants to nonprofits achieving positive results for the greater Madison area.

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Legacy Society

I am pleased to include a provision for a gift to Madison Community Foundation in my estate plans.

My gift will support:

- [ ] Highest priorities of MCF (Unrestricted)
- [ ] Community Impact Fund (Broad community support in MCF focus areas)
- [ ] An existing Agency or Field-of-Interest fund held at MCF _________________ Fund name or number
- [ ] My existing named fund held at MCF _________________ Fund name or number
- [ ] A new named fund held at MCF _________________ Fund name or number
- [ ] Other: _________________

Signature __________________________ Date ______

Signature __________________________ Date ______
LEAVING A LEGACY

Pete & Jill Lundberg

To visit his 90-year-old father, his dad always asks him, “How’s Mom?” He’s interested, Pete says, because his father was the first president of the Community Foundation of North Central Wisconsin, and his parents made sure to give giving in their own, who now shares the joy of giving with his wife, Jill.

They now give to MCF’s Community Impact Fund, recognizing the Community Foundation’s impact on their home community, arts, and environment, and giving back to the community and its people.

We recognize the hard work our neighbors do to make our community a better place, and we want to support them in their efforts. Pete says, “If we can help others in the community, it’s a great way to give back to those who support us.”

Madison Community Foundation

Learn about flexible, tax-smart ways to invest your resources for greatest philanthropic impact.

Contact us to find ways to give cheaper, easier, and smarter:

Jaya Iyer

was a beloved professor and mentor. Soon her estate will help treat and cure blindness in her native India.

Visual impairment is one of the world’s most prevalent health problems. It can be treated. Through her estate plan, Jaya created a permanent endowment to support Madison Community Foundation’s work.

Jaya was born in Bombay in 1933 and lived in India until she came to the University of Wisconsin-Madison as a graduate student in the Department of Ophthalmology in 1968. For nearly 40 years, she mentored countless students and a valued consultant to the University.

Her legacy will continue to support the health and well-being of countless students, both in Madison and around the world.

Madison Community Foundation

Contact us to find ways to give cheaper, easier, and smarter:
Lessons Learned in Donor Engagement

Timing is Everything

Nothing too Fancy

History is Your Friend

Change is Good

We’ve Only Just Begun
Communications Strategy:

Build media plan and connect “75” and MCF key messages to all activities. Ensure every event is newsworthy. Speaks to MCF’s history, legacy and impact.
Join the Celebration

WHAT  Madison Gives 2017
Madison Community Foundation’s 75th Anniversary

WHEN  Tuesday, May 16
5 p.m. Reception
6 p.m. Dinner and Program

WHERE  Where else? At Monona Terrace, the community and convention center built by local philanthropy, including a $1 million gift from MCF. The gift reinvigorated the project envisioned by architect Frank Lloyd Wright in 1938, and nearly 60 years later Monona Terrace was finally realized.

WHY  MCF’s 75th anniversary is a unique opportunity to bring the community together to celebrate our region’s most precious gems, as well as discovering new ones. As part of the yearlong celebration, MCF will make a series of major grants from parks and lakes, to schools and neighborhood centers, to downtown spaces, to arts and the environment.

Join us for this historic event and help us launch a year of reflection, celebration and imagination!

75 YEARS
Event and registration details at madisongives.org/events

MCF Leadership Invites You to Create a Legacy

IN RECOGNITION OF  Madison Community Foundation’s 75th Anniversary, MCF’s current and past leaders are coming together to ensure the Foundation’s transformational impact continues far into the future. Together they will spearhead a campaign to add 75 Legacy Society members to celebrate the Trust’s 75th anniversary.

“This is about bringing people together to support a community they love,” says current president Bob Sorge. “They want to see the greater Madison area prosper and they can leave a legacy to make that happen.”

Join us with your commitment to this special place we all call “home.”

To learn more, call Bob Sorge at (608) 232.1763.

Sign up for our newsletters at madisongives.org

Gold Sponsors

Alliant Energy  CUNA Mutual Group  NGL

Madison COMMUNITY FOUNDATION

75 YEARS
Invest in Yourself
Discover the Impact of a Year of Giving

$1 million • 12 major gifts
Supporting the Madison area’s unique natural and cultural assets

Follow the exciting monthly grant announcements at madisongives.org and learn how your gift can have a lasting impact in our community.

#MCFYearofGiving
#MCFYearofGiving presents a year of grants

- **Evolution Madison**: May
- **Back to the Beach**: June
- **Capitol Century**: July
- **Beyond the Bubbler**: August
- **I Am Madison**: September
- **First Nations Heritage Tour**: October
- **Shine On Madison**: November
- **Mad About Bikes**: December
- **Amplify Madison**: January
- **Phoenix from the Ashes**: February
- **Penn Park Pride**: March

*Watch for next month’s reveal*
Board and Staff Engagement
Work the Brand
Discover the Impact of a Year of Giving

Madison Community Foundation celebrates Downtown Madison as one of our most unique natural and cultural assets.

Learn more about our 75th anniversary Year of Giving at madisongives.org.
Grantee Communications Support

Promotional Toolkit
Media Seminar
Individual One on One

Welcome to the "My Favorite Lake" Student Art Exhibit
Featuring student art from the "Back to the Beach" Initiative
Find out more at: cleanlakesalliance.org

I AM MADISON

Madison Community Foundation
75th Anniversary
# Traditional and Social Media Results

226 Editorial Mentions (news, articles, etc.)

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#MCFYearofGiving
Thank you to our sponsors:

- Alliant Energy
- NGL
- CUNA MUTUAL GROUP
- Madison WISC TV6
- Madison magazine
- Madison Community Foundation
Lessons Learned in Communications

Don’t Know Much About History...
Power of Google & Social Media
No Two Nonprofits Are Alike
Everything Costs Twice As Much
Path to the Future
Hindsight

Pack half as much/bring twice as much $$

Challenges of transitions

Social media

Giving away money is hard
#MCFYearofGiving

madisongives.org