Association of Fundraising Professionals
Greater Madison Chapter
2017 Slate of Officers

Jen Davie, CFRE — President
Janie Winston — President Elect
Adam Erdmann — Immediate Past President
OPEN — Secretary
Lynn Heslinga — Treasurer
Adam Erdmann — Communications Co-Chair
OPEN — Communications Co-Chair
Paul Harrison — Diversity Chair
Dan Plummer D. Mus. A— Fundraising Day WI Co-Chair
Michele Traband — Fundraising Day WI Co-Chair
Mary Donahue — Membership Co-Chair
Sarah Linn — Membership Co-Chair
Saira Frank — National Philanthropy Day Co-Chair
Annie Thym — National Philanthropy Day Co-Chair
Lori Werbeckes, CFRE — Professional Development Chair
Nicole Hoffmann — Program Co-Chair
Janie Winston — Program Co-Chair
Courtney Polster, Ph.D., CFRE — Scholarship Chair
Pete Schwieger — Young Professionals/Youth in Philanthropy Chair

2016 Annual Report
AFP Greater Madison Chapter
Annual Meeting
December 13, 2016
2016 Highlights

- Provided 13 scholarships to our members for a variety of educational conferences and workshops critical to professional development.
- Retained our statuses as a Ten Star Gold and Friends of Diversity Chapter.
- Hosted Fundamentals of Fundraising and the CFRE Review Course with a total of 20 participants from a variety of AFP chapters; Two chapter members became CFREs shortly after taking the class.
- Reached a new membership record of 191 professionals, welcomed 46 new members and 71% of membership chose to renew.
- Diversity Committee offered free workshops for small, grassroots non-profit organizations and worked to support equity-based organizations with a three-year discounted membership program.
- Hosted two networking events for Young Professionals and provided mentoring connections to 12 AFP members.
- Increased National Philanthropy Day sponsorship by 17% from 2015, had a record high of 24 award nominees and sold out with 436 guests in attendance.
- Based on AFP survey results, strong programs ranging from signature events, to up and coming donors, long careers in fundraising, donor advised funds, and a broad range of other topics; Hosted nine chapter meetings with an average of 64 people in attendance.
- A new membership brochure was crafted, edited and published with the help of American Printing Company.
- Posted 112 advertisements to the Job Board to connect professionals with opportunities for career advancement.
- Fundraising Day Wisconsin hosted 228 participants; In partnership with AFP Southeastern WI, the one-day conference welcomed nationally-acclaimed presenters Gail Perry, Rebecca Fishman Lipsey, Chuck Loring, and Rachel Muir.

Thank you!

Be the Cause Campaign Honor Roll
The following chapter members helped us exceed our 2016 Be The Cause goal by 14%. Based on these gifts, the grant back to our chapter in 2017 will grow and benefit our membership even more!

David E. Allen  Katie Knill
Connie Beam  Howard Landsman
Judith Brannstorm  Sarah Linn
Jennie Casavant  Daun Maier, CFRE
Jennifer Jeffress Collins  Renee Moe
Jen Davie, CFRE  David Mossner, CFRE
Mary E. Donahue  Casey Oelkers
Patricia L. Eldred, CFRE  Daniel Plummer, D. Mus. A
Adam Erdmann  Courtney Polster, Ph.D., CFRE
Saira Frank  Erin Richardson
Terrie Goren, CFRE  Kristi Shepard
Paul D. Harrison  Annie Thym
Marcy Heim, CFRE  Clint Walz
Nicole Hoffmann  Lori Werbeckes, CFRE
Kirsten Houghton, CPA  Janie Winston
Amy Kerwin  Chris Ziemba
Gary Klein
A Special Thank You to the 2016 Sponsors
Monthly Meeting, Fundraising Day Wisconsin & National Philanthropy Day Sponsors

Agrace Hospice  
Alliant Energy Foundation  
American Girl  
American Printing Company  
Anonymous  
Associated Bank  
Attic Angel Association  
Bid Pal  
Bloomerang  
Community Shares of Wisconsin  
CUNA Mutual Foundation  
Event Essentials  
First Business Trust & Investments  
Flad Development & Investment Corp.  
Flower Studio  
Full Compass  
Greater Giving  
Greater Milwaukee Foundation  
Ideal Printing & Graphics  
InBusiness  
J.H. Findorff & Son, Inc.  
Johnson Bank  
Kelly Family Foundation  
Little Green Pencil  
M3 Insurance  
Madison Community Foundation  
Madison Concourse Hotel & Governor’s Club  
McDonald Schaefer  
Melissa Grace Photography  
MGE Foundation, Inc.  
Midwest Family Broadcasting  
National Guardian Life Insurance Company  
Nonprofit Center of Milwaukee  
Numbers 4 Nonprofits  
Oak Bank  
Overture Center for the Arts  
RCB Donor Recognition  
Spano Pratt  
SSM Health St. Mary’s Foundation-Madison  
Summit Credit Union  
SVA Certified Public Accountants, S.C  
The Badger Group  
The Employer Group  
The Results Group  
Timpano Consulting  
Town Bank  
United Way of Dane County  
United Way of Dane County Foundation  
University of Wisconsin Foundation  
US Bank  
UW Carbone Cancer Center  
UW Health & Unity Health Insurance  
UWM Helen Bader Institute for Nonprofit Management  
UW Parkside  
Webcrafters, Inc.  
Wegner CPAs  
Wipfli LLP  
WISC-TV  
Wisconsin Planned Giving Council  
WPS Health Solutions

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<thead>
<tr>
<th>Budget 2016</th>
<th>Actual as of 11/30/2016</th>
<th>Percentage Variance</th>
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</thead>
<tbody>
<tr>
<td>Revenue:</td>
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<tr>
<td>Philanthropy Day sponsorships</td>
<td>25,000</td>
<td>44,000</td>
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<td>15,000</td>
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<td>12,220</td>
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<td>Fundraising Day Wisconsin</td>
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<td>100</td>
<td>95</td>
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<td>CFRE/Fundamentals in Fundraising</td>
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<td>Nakoma CC in-kind</td>
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<td>AFP Chapter Incentive Program</td>
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<td>Total income</td>
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<td>145,690</td>
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Expenses:
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<th>Actual as of 11/30/2016</th>
<th>Percentage Variance</th>
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<td>Philanthropy Day</td>
<td>19,750</td>
<td>22,570</td>
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<td>Philanthropy Day in-kind</td>
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<td>51%</td>
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<td>Programs</td>
<td>11,800</td>
<td>10,812</td>
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<td>34,175</td>
<td>40,122</td>
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<td>Professional Development</td>
<td>920</td>
<td>80</td>
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<td>Nakoma CC In-Kind</td>
<td>5,600</td>
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<td>0%</td>
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<td>CFRE/Fundamentals in Fundraising</td>
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<td>8,102</td>
<td>73%</td>
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<td>Communications</td>
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<td>Scholarships</td>
<td>5,000</td>
<td>4,745</td>
<td>95%</td>
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<td>Membership</td>
<td>1,050</td>
<td>955</td>
<td>91%</td>
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<td>Diversity</td>
<td>2,075</td>
<td>300</td>
<td>14%</td>
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<td>Young Professionals</td>
<td>300</td>
<td>281</td>
<td>94%</td>
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<tr>
<td>Administration</td>
<td>28,025</td>
<td>25,996</td>
<td>93%</td>
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<tr>
<td>Total expenses</td>
<td>132,495</td>
<td>125,767</td>
<td>95%</td>
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Net income /(loss) $ 5 $ 19,922
2016 Chapter Leadership

Officers
President    Adam Erdmann
President Elect   Jen Davie, CFRE
Secretary    Lori Werbeckes, CFRE
Treasurer    Kirsten Houghton, CPA, MBA
Immediate Past President  Nicole Hoffmann

Committee Chairs
Communications Co-Chair   Katie Knill
Communications Co-Chair   Clint Walz
Diversity Chair    Paul Harrison
Fundraising Day WI Co-Chair Jennifer Jeffress Collins
Fundraising Day WI Co-Chair Dan Plummer, D. Mus. A
Membership Co-Chair    Jennie Casavant
Membership Co-Chair    Mary Donahue
Nat'l Philanthropy Day Co-Chair  Saira Frank
Nat'l Philanthropy Day Co-Chair  Annie Thym
Professional Development Co-Chair  Jen Davies, CFRE
Professional Development Co-Chair  Lori Werbeckes, CFRE
Program Chair    Janie Winston
Scholarship Chair    Courtney Polster, Ph.D., CFRE
Young Professionals/ Youth in Philanthropy Chair  Sarah Linn

Chapter Administrator, Erin L. Richardson

Mission
AFP Greater Madison is a partnership of people and organizations devoted to advancing ethical and effective philanthropy through education, professional development, networking and outreach.

AFP Greater Madison Chapter
P.O. Box 45046
Madison, WI 53744-5046
www.afpmadison.afpnet.org
608-224-9092

2016-2018 Action Plan Highlights

Goal I:   AFP Greater Madison provides and enhances opportunities for professional development education and assists members to maximize the benefits provided by AFP Int'l to help fundraising professionals succeed at every stage of their careers.

Goal II:   AFP Greater Madison is a thriving and growing, inclusive community of fundraising professionals and community members that represents the diversity of our community and the needs served by our work.

Goal III:   AFP Greater Madison advocates for and promotes the value of our profession and the culture of philanthropy in our community.

Goal IV:   AFP Greater Madison is effectively governed, soundly funded and efficiently managed consistent with best nonprofit practices.