

**Association of Fundraising Professionals  
Greater Madison Chapter  
2018 Slate of Officers**

Jen Davie, CFRE — President

Janie Winston — President Elect

Adam Erdmann — Immediate Past President

Jacob Immel — Secretary

Lynn Heslinga, CPA — Treasurer

Adam Erdmann — Communications Co-chair

Shauna Thayer — Communications Co-chair

Julia O'Donnell — Diversity Chair

Dan Plummer D. Mus. A— Fundraising Day WI Chair

Mary Donahue — Membership Co-chair

Sarah Linn — Membership Co-chair

Kaitlin Kropp — National Philanthropy Day Co-chair

Annie Thym — National Philanthropy Day Co-chair

Mindy Petersen — Professional Development Co-chair

Lori Werbeckes, CFRE — Professional Development Co-chair

Nicole Hoffmann — Program Co-chair

Jan Viney — Program Co-chair

Courtney Polster, Ph.D., CFRE — Scholarship Chair

Pete Schwieger – Young Professionals/Youth in Philanthropy Chair



## **2017 Annual Report**

**AFP Greater Madison Chapter  
Annual Meeting  
December 19, 2017**

## 2017 Highlights

- Provided 15 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.
- The Professional Development committee hosted two “Roundtable: After Work” events. They were a successful addition to our calendar and will be offered again in 2018.
- Broke our goal! Reached a new membership record of 205 professionals, welcomed 65 new members and 65% of membership chose to renew.
- Diversity, Inclusion and Equity continue to be a focus of the board and committees. The Board of Directors held a special meeting to discuss how the chapter can improve its efforts in this area and meet the needs of our membership.
- The Young Professionals committee implemented the “Friends, food and fundraising” program at luncheon events offering new and potential members opportunity to network with their peers.
- Doubled the number of tickets sold in the member-only presale for the National Philanthropy Day celebration.
- The Program Committee hosted nine chapter meetings with an average of 77 people in attendance. Including a two-hour special event bringing regional speaker, Brent Hafele in to present on Engaging the Board in Fundraising.
- The Communications Committee has engaged with Brick Road PR to create a more effective communications strategy designed to support AFP Greater Madison Chapter's goals and members.
- Posted a record breaking 164 advertisements to the Job Board to connect professionals with opportunities for career advancement.
- Fundraising Day Wisconsin hosted an almost sold-out group of 316 participants; In partnership with AFP Southeastern WI, the one-day conference welcomed nationally-acclaimed presenters Penelope Burk, John D Trybus, APR, Tammy Zonker, and Jean Kolb.

## Thank you!

### Be the Cause Campaign Honor Roll

Thank you to all of the donors who have already contributed to the AFP Foundation's Be the Cause campaign in 2017. These dollars help support scholarships, diversity and industry research, both locally and internationally.

Can you help us make AFP Greater Madison a place that thrives with education opportunities for all fundraisers who want to be part of this community?

**Make a gift of any size to the Be the Cause campaign today.**

Gifts can be processed at the registration table today or online.

Judith Brannstrom  
Jennifer Jeffress Collins  
Jen Davie, CFRE  
Mary E Donahue  
Adam Erdmann  
Terrie Goren, CFRE  
Paul D. Harrison  
Lynn Heslinga, CPA  
Nicole Hoffmann  
Kirsten Houghton, CPA  
Gary Klein  
Kaitlin Kropp  
Howard Landsman  
Sarah Linn

Renee Moe  
David Mossner, CFRE  
Daniel Plummer, D. Mus. An  
Courtney Polster, Ph.D., CFRE  
Erin Richardson  
Peter Schwieger, BA  
Stacy Seiden  
Kristi Shepard  
Annie Thym  
Michele Traband, MA  
Lori Werbeckes, CFRE  
Janie Winston  
Chris Ziemba, CFRE

**BE**  **CAUSE**  
**Empower. Strengthen. Transform.**

## A Special Thank You to the 2017 Sponsors

Monthly Meeting, Fundraising Day Wisconsin & National Philanthropy Day Sponsors

Agrace Hospice	National Guardian Life Insurance Company
Alliant Energy Foundation	Natural Resources Foundation
Amanda White Consulting	Nonprofit Center of Milwaukee
American Girl	Numbers 4 Nonprofits
American Printing Company	Oak Bank
Anonymous	Overture Center for the Arts
Associated Bank	Park Hotel
Attic Angel Community	shopping.gives
Chocolaterian Cafe	SPI Consulting, LLC
Community Shares of Wisconsin	SSM Health St. Mary's Foundation-Madison
Crescendo	SVA Certified Public Accountants, S.C
CUNA Mutual Foundation	The Badger Group
Edgewood College	The Employer Group
First Business Trust & Investments	United Way of Dane County
Flad Development & Investment Corp.	United Way of Dane County Foundation
Full Compass	University of Wisconsin Foundation
Greater Giving	US Bank
Greater Milwaukee Foundation	UW Carbone Cancer Center
J.H. Findorff & Son, Inc.	UW Center for Community & Nonprofit Studies
Johnson Bank	UW Health & Quartz
Kelly Family Foundation	UWM Helen Bader Institute for Nonprofit Management
Madison Community Foundation	Webrcrafters, Inc.
Madison Opera	Wegner CPAs
Kelly Family Foundation	Wipfli LLP
McDonald Schaefer Group	WISC-TV
MGE Foundation, Inc.	Wisconsin Association of Charitable Gift Planners
Midwest Family Broadcasting	Wisconsin Philanthropy Network

CHANGE THE WORLD



WITH A GIVING HEART

**National  
Philanthropy Day®**



An AFP Milwaukee/Madison Partnership  
**Bringing National Talent  
to Your Backyard**

## AFP - Greater Madison Chapter

### 2017 Budget to Actual Results

	Budget 2017	Actual as of 12/10/2017	Percentage Variance
<b>Revenue:</b>			
Philanthropy Day sponsorships	35,000	44,500	27%
Philanthropy Day registration	15,000	16,125	8%
Philanthropy Day in-kind	12,200	16,198	33%
Monthly chapter program mtgs	10,000	11,342	13%
Monthly chapter program sponsor	2,400	1,875	-22%
Webconferences	500	70	-86%
Fundraising Day Wisconsin	45,000	58,435	30%
Professional Development	2,450	690	-72%
Young Professionals	50	160	220%
Job board	6,500	8,010	23%
AFP member rebate	7,150	8,243	15%
BE the CAUSE rebate	500	540	8%
Interest	330	275	-17%
<b>Total revenue</b>	<b>137,080</b>	<b>166,463</b>	<b>21%</b>
<b>Expenses:</b>			
Philanthropy Day	19,750	20,798	5%
Philanthropy Day in-kind	12,200	16,198	33%
Programs	12,220	13,783	13%
Fundraising Day Wisconsin	37,575	48,862	30%
Professional Development	1,120	87	-92%
Communications	200	1,330	565%
Scholarships	12,500	7,191	-42%
Membership	1,125	738	-34%
Diversity	1,900	250	-87%
Young Professionals	500	442	-12%
Administration	36,139	30,358	-16%
<b>Total expenses</b>	<b>135,229</b>	<b>140,037</b>	<b>4%</b>
<b>Net income</b>	<b>\$ 1,851</b>	<b>\$ 26,426</b>	

## 2017 Chapter Leadership

### Officers

President	Jen Davie, CFRE
President Elect	Janie Winston
Secretary	Stacy J. Seiden, MPP
Treasurer	Lynn Heslinga, CPA
Immediate Past President	Adam Erdmann

### Committee Chairs

Communications Chair	Adam Erdmann
Diversity Chair	Paul Harrison
Fundraising Day WI Co-chair	Dan Plummer, D. Mus. A
Fundraising Day WI Co-chair	Michele Trabant
Membership Co-chair	Mary Donahue
Membership Co-chair	Sarah Linn
Nat'l Philanthropy Day Co-chair	Kaitlin Kropp
Nat'l Philanthropy Day Co-chair	Annie Thym
Professional Development Chair	Lori Werbeckes, CFRE
Program Co-chair	Nicole Hoffmann
Program Co-chair	Janie Winston
Scholarship Chair	Courtney Polster, Ph.D., CFRE
Young Professionals/ Youth in Philanthropy Chair	Pete Schwieger

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](http://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.

