2018 BOARD LEADERSHIP

President: Jen Davie, CFRE
President Elect: Janie Winston
Immediate Past President: Adam Erdmann
Secretary: Jacob Immel
Treasurer: Lynn Heslinga, CPA
Communications Co-chair: Adam Erdmann
Communications Co-chair: Shauna Thayer
Diversity Chair: Julia O’Donnell
Fundraising Day WI Chair: Dan Plummer
Membership Co-chair: Mary Donahue
Membership Co-chair: Sarah Linn
National Philanthropy Day Co-chair: Kaitlin Kropp
National Philanthropy Day Co-chair: Annie Thym
Professional Development Co-chair: Mindy Petersen
Professional Development Co-chair: Lori Werbeckes, CFRE
Program Co-chair: Nicole Hoffmann
Program Co-chair: Jan Viney
Scholarship Chair: Courtney Polster, Ph.D., CFRE
Young Professionals/Youth in Philanthropy Chair: Pete Schwieger
2019 BOARD OF DIRECTORS

President: Janie Winston
President-elect: Sarah Linn
Immediate Past President: Jen Davie, CFRE
Secretary: Jake Immel
Treasurer: Lynn Heslinga, CPA
Communications Co-chair: Shauna Thayer
Communications Co-chair: Marissa DeGroot
Diversity Co-chair: Julia O'Donnell
Diversity Co-chair: Open Position
Fundraising Day Wisconsin Co-chair: Mary Donahue
Membership Co-chair: Sarah Linn
Membership Co-chair: Tracy Phillippi
National Philanthropy Day Co-chair: Dan Plummer
National Philanthropy Day Co-chair: Michele Traband
Professional Development Co-chair: Mindy Petersen, CFRE
Professional Development Co-chair: David Mossner, CFRE
Program Co-chair: Julie Ehrke
Program Co-chair: Kristi Shepard
Scholarship Chair: Courtney Polster, Ph.D., CFRE
Young Professionals/Youth in Philanthropy Co-chair: Pete Schwieger
Young Professionals/Youth in Philanthropy Co-chair: Anna January
Thank you to all of the donors who have already contributed to the AFP Foundation's Be the Cause campaign in 2018.

These dollars help support scholarships, diversity and industry research, both locally and internationally.
MEMBERSHIP HIGHLIGHTS

Our Membership Committee hosted our annual AFP After Work, bringing together more than 50 development professionals for an evening of networking, socializing, and raffle prizes!
YOUNG PROFESSIONALS HIGHLIGHTS

• AFP–Madison Young Professionals hosted two major events focused on donor cultivation and advocating for oneself in the workplace. Both events were highly attended.

• AFP–Madison honored Anne Murphy (Nominated by Ronald McDonald House Charities of Madison) as Outstanding Young Fundraising Professional and Izzy Zahn (Nominated by Make-A-Wish Wisconsin) as Outstanding Youth in Philanthropy during the 2018 National Philanthropy Day celebration.
SCHOLARSHIP HIGHLIGHTS

• In 2018, the scholarship committee was honored to award a total of $12,500 through 17 scholarships to our members.

• Members of the 2018 scholarship committee are: Brandi Funk, Assoc. Director of Development at UW Foundation, College of Agriculture and Life Sciences; Lisa Gundlach, Major Gifts Officer at Second Harvest; Gary Klein, Vice President at Edgewood College; Quinn Heneghan, Operations Manager at Urban Assets, Courtney Polster, Development Manager at Agrace HospiceCare and Mike Sweitzer Beckman, Major Gifts Officer at Edgewood College.
PROFESSIONAL DEVELOPMENT HIGHLIGHTS

• The CFRE Refresher Course was an adventure and success, with 7 of 9 attendees going on to test and pass the exam.

• The always-sold-out grants information workshop was yet again a huge success.

• Six quarterly roundtables provided valuable opportunities for AFP members to learn from and commiserate with each other.
COMMUNICATIONS HIGHLIGHTS

• Launched new Chapter website. Be sure to check it out, www.afpmadison.org.

• Increased frequency of the newsletter. Members now received industry relevant content monthly.
DIVERSITY HIGHLIGHTS

• Retained our status with the Friends of Diversity designation
• Held a successful and sold out October program on How to Retain a Diverse Workforce.
• Gained 2 new Diversity Committee members
• The committee added, Timeka Rumph, as the co-chair for the committee.
PROGRAM HIGHLIGHTS

• Increased attendee outreach, making our program meetings more accessible by adding a new location at Goodman Community Center.

• **SOLD OUT two programs in 2018**: Corporate Giving and Changes in Tax Laws

• Successfully **kept our programs affordable** to all including offering two free programs to AFP members.

• Offered a wide variety of program topics meeting our membership's diverse training needs based on YOUR feedback.
A special thanks to our monthly meeting sponsors!
FUNDRAISING DAY WISCONSIN

• Speakers included: Vu Le, Megan McGee, Jim Anderson, Alice Ferris, Anne Melvin, Amy Eisenstein

• This event is in partnership with AFP Southeast Wisconsin

2018 Attendance = 346
2018 FUNDRAISING DAY
WISCONSIN SPONSORS

• Greater Milwaukee Foundation
• Numbers 4 Nonprofits
• SVA
• Wisconsin Foundation and Alumni Association
• Wisconsin Union

A special thanks to our event sponsors!
NATIONAL PHILANTHROPY DAY AWARDS LUNCHEON

• 8 Honorees: 1st ever Young Fundraising Professional honoree: Anne Murphy
• Record year of sponsorship dollars raised
• Total tickets for event consisted of 265 seats filled by sponsors, nominators and honorees, 138 tickets sold.

2018 Attendance = 403!
2018 NATIONAL PHILANTHROPY DAY SPONSORS

National Guardian Life
Cuna Mutual Group
Madison Community Foundation
Overture Center For the Arts
Alliant Energy Foundation
Edgewood College
TASC
UnityPoint Health Meriter Foundation
Johnson Bank
SVA
Attic Angel Community
SSM Health St. Mary’s Foundation
Wisconsin Public Television,
US Bank, MGE Foundation,
Wisconsin Foundation & Alumni
Association
Full Compass,
First Business Associated Bank
American Girl
Flad Development & Investment Corp.
United Way of Dane County & United Way
Foundation
Wegner CPAs

Wipfli LLP
Wisconsin Association of Charitable
Gift Planners
J.H. Findorff & Son, Inc.
Madison Symphony Orchestra
Oak Bank
Madison Opera
Midwest Family Broadcasting
WISC-TV
American Printing

A special thanks to our monthly meeting sponsors!
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.
## BUDGET

<table>
<thead>
<tr>
<th></th>
<th>Approved Budget 2018</th>
<th>Actual as of 12/11/2018</th>
<th>Percentage Variance</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Revenue:</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Philanthropy Day</td>
<td>41,200.00</td>
<td>47,800.00</td>
<td>16.0%</td>
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<tr>
<td>Philanthropy Day</td>
<td>15,000.00</td>
<td>12,830.00</td>
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<tr>
<td>Philanthropy Day in-kind</td>
<td>16,250.00</td>
<td>26,423.00</td>
<td>62.6%</td>
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<td>Monthly chapter</td>
<td>11,000.00</td>
<td>9,211.00</td>
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<tr>
<td>Monthly chapter program</td>
<td>2,250.00</td>
<td>2,850.00</td>
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<tr>
<td>Fundraising Day</td>
<td>45,000.00</td>
<td>70,279.00</td>
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<tr>
<td>Professional Development</td>
<td>800.00</td>
<td>750.00</td>
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<tr>
<td>Young Professionals</td>
<td>50.00</td>
<td>220.00</td>
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<tr>
<td>CFRE review course</td>
<td>3,220.00</td>
<td>3,610.00</td>
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<td>Job Board</td>
<td>6,750.00</td>
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<td>AFP member rebate</td>
<td>7,200.00</td>
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<td>Be the Cause rebate</td>
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<td>Interest</td>
<td>300.00</td>
<td>533.73</td>
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<tr>
<td><strong>Total revenue</strong></td>
<td>149,520.00</td>
<td>190,868.23</td>
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<td><strong>Expenses:</strong></td>
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<tr>
<td>Philanthropy Day</td>
<td>24,850.00</td>
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<td>Philanthropy Day in-kind</td>
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<td>Programs</td>
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<td>Fundraising Day Wisconsin</td>
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<td>Young Professionals</td>
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<td>CFRE review course</td>
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<td>Administration</td>
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<td><strong>Total expenses</strong></td>
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<td>179,174.39</td>
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<tr>
<td><strong>Net income (loss)</strong></td>
<td>(4,816.00)</td>
<td>11,693.84</td>
<td></td>
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</tbody>
</table>
THANK YOU
FROM THE AFP MADISON CHAPTER

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
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