



AFP MADISON CHAPTER

2018 ANNUAL REPORT

DECEMBER 18, 2018



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 NOMINEES

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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



CAMPAIGN HONOR ROLL

Connie Beam
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Peter Schwieger, BA
Shauna Thayer
Annie Thym
Jan Viney
Lori Werbeckes, CFRE
Janie Winston
Chris Ziemba, CFRE



Empower. Strengthen. Transform.

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.



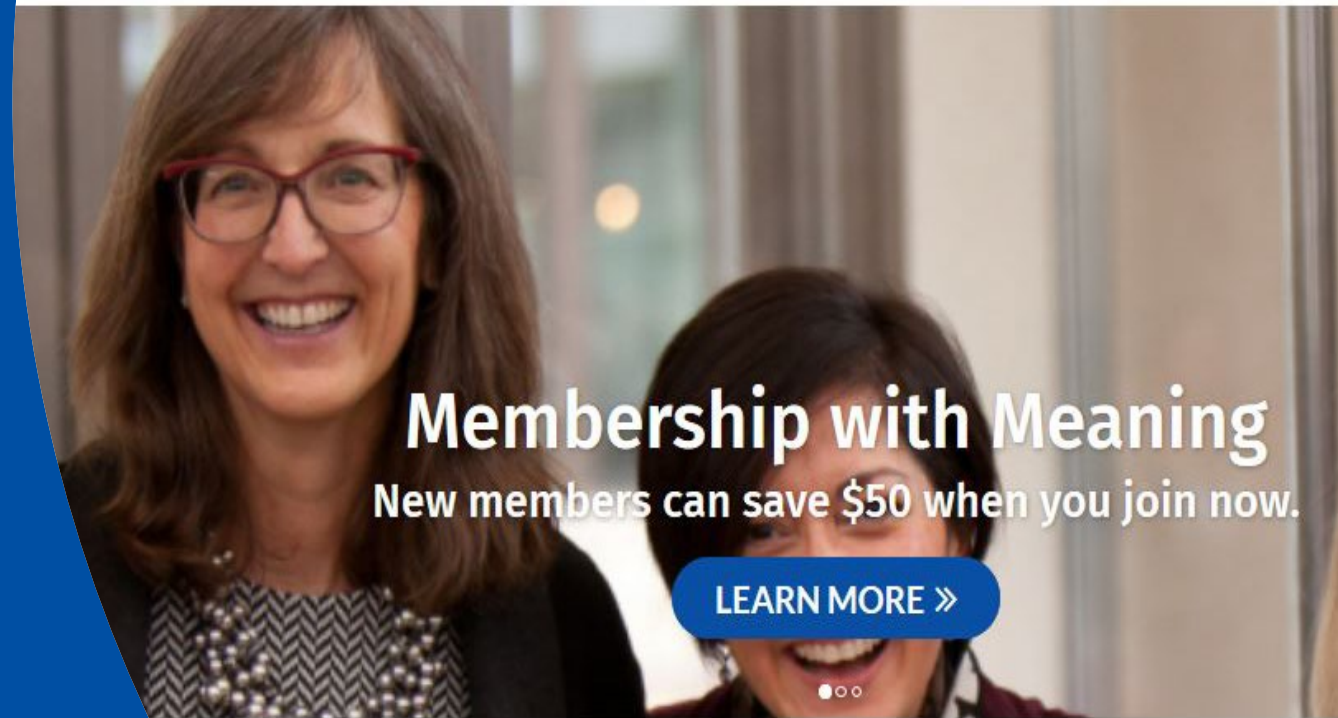
PROFESSIONAL DEVELOPMENT HIGHLIGHTS

- 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.



Membership with Meaning
New members can save \$50 when you join now.

LEARN MORE »

Welcome to the Association of
Fundraising Professionals

MADISON CHAPTER

AFP »

Association of Fundraising Professionals Greater Madison is a community of professionals committed to ethical fundraising and philanthropy. Our chapter is the trusted go-to resource for networking and professional development opportunities for fundraising and nonprofit employees in the Madison region, as well as the southern Wisconsin.

With valuable tools like workshops, webinars and a job board, our 200+ members and hundreds of others build and find satisfaction in their careers — the effects of which extend into the greater community and ultimately contribute to a world of good.

We encourage anyone interested in philanthropy, fundraising or nonprofits to join us for an AFP Greater Madison program or

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.



FRIENDS OF DIVERSITY
ASSOCIATION OF FUNDRAISING PROFESSIONALS 2017



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.



2018 MONTHLY MEETING SPONSORS

- Park Bank
- Alliant Energy Foundation
- WIPFLI
- Levy Giving Fund
- Center for Nonprofit Studies UW Madison
- Wisconsin Association of Charitable Gift Planners
- SVA
- UW Carbone Cancer Center
- J.H. Findorff & Son, Inc.



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

	Approved Budget 2018	Actual as of 12/11/2018	Percentage Variance
Revenue:			
Philanthropy Day sponsorships	41,200.00	47,800.00	16.0%
Philanthropy Day registration	15,000.00	12,830.00	-14.5%
Philanthropy Day in-kind	16,250.00	26,423.00	62.6%
Monthly chapter program meetings	11,000.00	9,211.00	-16.3%
Monthly chapter program sponsor	2,250.00	2,850.00	26.7%
Fundraising Day Wisconsin	45,000.00	70,279.00	56.2%
Professional Development	800.00	750.00	-6.3%
Young Professionals	50.00	220.00	340.0%
CFRE review course	3,220.00	3,610.00	12.1%
Job Board	6,750.00	6,146.00	-8.9%
AFP member rebate	7,200.00	9,995.00	38.8%
Be the Cause rebate	500.00	220.50	-55.9%
Interest	300.00	533.73	77.9%
Total revenue	149,520.00	190,868.23	27.7%
Expenses:			
Philanthropy Day	24,850.00	23,023.20	-7.4%
Philanthropy Day in-kind	16,250.00	26,423.00	62.6%
Programs	14,300.00	12,097.69	-15.4%
Fundraising Day Wisconsin	40,800.00	59,837.57	46.7%
Professional Development	100.00	386.00	286.0%
Communications	1,500.00	2,020.78	34.7%
Scholarships	12,500.00	11,690.00	-6.5%
Membership	750.00	583.64	-22.2%
Diversity	1,900.00	0	-100.0%
Young Professionals	500.00	668.97	33.8%
CFRE review course	3,510.00	2,565.53	-26.9%
Administration	37,376.00	39,878.01	6.7%
Total expenses	154,336.00	179,174.39	16.1%
Net income (loss)	(4,816.00)	11,693.84	



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.

THANK YOU

FROM THE AFP MADISON CHAPTER

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