2019 BOARD LEADERSHIP

President: Janie Winston
President Elect: Sarah Linn
Immediate Past President: Jen Davie, CFRE
Secretary: Jacob Immel
Treasurer: Lynn Heslinga, CPA
Communications Co-chair: Marissa DeGroot
Communications Co-chair: Shauna Thayer
Diversity, Equity & Inclusion Chair: Julia O’Donnell
Fundraising Day WI Chair: Mary Donahue
Membership Co-chair: Tracy Phillippi
Membership Co-chair: Sarah Linn
National Philanthropy Day Co-chair: Dan Plummer
National Philanthropy Day Co-chair: Michele Traband
Professional Development Co-chair: Mindy Petersen
Professional Development Co-chair: David Mossner
Educational Series Co-chair: Kristi Shepard
Educational Series Co-chair: Julie Ehrke
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
2020 BOARD OF DIRECTORS NOMINEES

President: Janie Winston
President-elect: Sarah Linn
Immediate Past President: Jen Davie, CFRE
Secretary: Halley Pucker
Treasurer: Caitlin Behncke
Communications Co-chair: Jen Davie
Communications Co-chair: Marissa DeGroot
Diversity, Equity & Inclusion Chair: Julia O’Donnell
Fundraising Day Wisconsin Chair: Mary Donahue
Membership Co-chair: Jake Immel
Membership Co-chair: Tracy Phillippi
National Philanthropy Day Co-Chair: Halley Pucker
National Philanthropy Day Co-Chair: Arlen Moss
Professional Development Co-chair: Mindy Petersen, CFRE
Professional Development Co-chair: David Mossner, CFRE
Educational Series Co-chair: Julie Ehrke
Educational Series Co-chair: Kristi Shepard
Scholarship Chair: Courtney Polster, Ph.D., CFRE
Young Professionals/Youth in Philanthropy Co-chair: Ash Collins
Young Professionals/Youth in Philanthropy Co-chair: Anna January
CAMPAIGN HONOR ROLL

David E. Allen
Judith Brannstrom
Jen Davie, CFRE
Marissa DeGroot
John Desimone
Mary E. Donahue
Julie Ehrke
Lori Fons
Nina Gehan
Heidi Habeger
Peggy Halloran
Lara Hermann, CFRE
Lynn Heslinga, CPA
Kirsten Houghton, CPA
Jacob Immel
Anna January
Luke Kloberdanz
Sarah Linn

Renee Moe
David Mossner, CFRE
Julia O'Donnell
Mindy Petersen, CFRE
Tracy Phillippi, BA
Daniel Plummer
Courtney Polster, CFRE
Mike Reuter
Elizabeth Rondon
Peter Schwieger
Kristi Shepard
Shauna Thayer
Michele Traband, MA
Lori Werbeckes, CFRE
Janie Winston
Debra Wolniak
Chris Ziemba, CFRE

Thank you to all of the donors who have already contributed to the AFP Foundation's Be the Cause campaign in 2019.

These dollars support scholarships, diversity efforts, and industry research, both locally and internationally.
Our Membership Committee hosted our annual AFP After Work at Giant Jones Brewery, bringing together more than 75 development professionals for an evening of networking, socializing, and raffle prizes!
YOUNG PROFESSIONALS HIGHLIGHTS

- AFP Greater Madison Young Professionals hosted two events focused on work life balance and a trivia event celebrating 5+ years of work from the Young Professionals Committee.

- AFP Greater Madison honored the UW Pre-Veterinary Association as Outstanding Youth in Philanthropy (Nominated by Dane County Humane Society) during the 2019 National Philanthropy Day Celebration.

- AFP Greater Madison YP Committee began developing a mentorship program to serve young professionals and those new to fundraising as a career, helping them connect and develop relationships with experienced chapter members.
SCHOLARSHIP HIGHLIGHTS

• In 2019, the scholarship committee was honored to award **15 scholarships** to our members!

• Members of the 2019 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; 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

• **Quarterly Roundtables** that brought fundraising peers together to compare notes, share ideas, and receive feedback on topics including *What Keeps You Up at Night, Donor Advised Funds, Cultivation Events, and Year-end-rush Plans and Concerns.*

• The annual **Grants Workshop** in August provided a free, two-hour workshop to AFP members interested in learning about a valuable collection of grant-seeking resources available in Madison. Content was suitable for development staff of all levels.

• In October, **professional headshots** (plus coffee and donuts!) were made free to all AFP members who donated blood through the American Red Cross!

• And finally, in November, a **free webinar** was provided to all AFP Members. The webinar, *Financial Literacy: What Every Fundraising Professional Needs to Know,* explained financial planning and cash management; financial statements and reporting; requirements of local, state, and federal governments; and the role of the Board of Directors and staff.
COMMUNICATIONS HIGHLIGHT

The monthly e-newsletter shared original AFP Greater Madison content as well as features from AFP Global with members with an average open rate of 30.33%, between 5.16% - 9.94% higher than the average nonprofit email open rate according to Mailchimp and Campaign Monitor.
DIVERSITY, EQUITY AND INCLUSION HIGHLIGHTS

• Retained our IDEA Champion (formerly Friends of Diversity) Designation.

• Held a successful and sold out October program on Intersectionality.

• Gained 1 new committee member.

• Changed our name from the Diversity Committee to the Diversity, Equity and Inclusion Committee.
EDUCATIONAL SERIES HIGHLIGHTS

• Thanks you for your feedback and program recommendations as our committee presented engaging and useful topics at our 2019 monthly chapter meetings.

• Our Educational Series featured relevant programs from mindfulness to planned giving to grassroots fundraising and more to help us grow in the fundraising profession.

• With sponsor support, two of our sessions were FREE or a REDUCED RATE for all attendees making them more accessible for our fundraising community while encouraging non-members and people new to the field to check out AFP.

• We continued to divide our Educational Series between Nakoma Golf Club and Goodman Community Center (and will do so again in 2020), offering our attendees different experiences at these venues.
2019 MONTHLY MEETING SPONSORS

• Alliant Energy Foundation
• Badger Group
• Katz Krantz CORE Fund
• Park Bank
• Wipfli
• Wisconsin Association of Charitable Gift Planners
• Zendesk

A special thanks to our monthly meeting sponsors!
• **Five national speakers**: Tammy Zonker, Julia Campbell, Marc A. Pitman, Jeff Schreifels, Jason Lewis. Speakers gave high remarks for the hospitality they received here in Wisconsin. Feedback was high for all speakers.

• **Expenses were reduced** by $6,000 in 2019 with a concerted effort to be efficient with our resources.

• **2019 Committee** - Lisa Pieper (Southeast Member), Mary Donahue (Madison Member), Sharon White (Madison Member), Julie Ehrke (Madison Member), Laura Emir (Southeast Member), Kelly Rickman (Southeast Member), Aimee Furrie (Madison Member), Dawn Groshek (Southeast Member), Jen Davie (Madison Member)

2019 Attendance = 334
2019 FUNDRAISING DAY WISCONSIN SPONSORS

SVA - Certified Public Accountants
McDonald Schaefer
Numbers 4 Nonprofits
Wisconsin Foundation Alumni Association
The Artful Asker
Edgewood College
Spano Pratt
Greater Giving
Greater Milwaukee Foundation
The Badger Group
Ter Molen Watkins & Brandt, LLC
Wisconsin Philanthropy Network
Community Brands (Gesture.com)
UW Milwaukee - Helen Bader Institute for Nonprofit Management
Abbey Group
Kendra Scott
Innovative NonProfit

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

• 7 honorees, representing philanthropic heroes for the arts, social service, healthcare, and animal welfare communities

• Over $43,000 in sponsorships, which support chapter scholarships and programming

2019 Attendance = 378
2019 NATIONAL PHILANTHROPY DAY

SPONSORS

• CUNA Mutual Group
• Madison Community Foundation
• National Guardian Life Insurance Company
• Overture Center for the Arts
• Alliant Energy Foundation
• Edgewood College
• Wisconsin Foundation and Alumni Association
• American Girl
• Associated Bank
• Full Compass
• Johnson Bank
• SSM Health St. Mary’s Foundation
• TASC
• Unity Point Health Meriter Foundation
• MGE Foundation
• Friends of Wisconsin Public Television
• Flad Development & Investment Corp
• Wisconsin Association of Charitable Gift Planners
• United Way of Dane County & United Way Foundation
• WISC-TV
• SVA
• Wegner CPAs
• US Bank
• Oak Bank
• Timpano Consulting
• Community Shares of Wisconsin
• J.H. Findorff & Son, Inc.
• American Printing
• Madison Opera
• Madison Symphony Orchestra
• Midwest Family Broadcasting

A special thanks to our event sponsors!
2019-2021 ACTION PLAN HIGHLIGHTS

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

• **Goal:** AFP Greater Madison is a thriving and growing, inclusive community of fundraising professionals that strives to represent the diversity of our community.

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

• **Goal:** AFP Greater Madison is effectively governed, soundly funded and efficiently managed consistent with best nonprofit practices.
## 2019 Budget

### Revenue:

<table>
<thead>
<tr>
<th>Description</th>
<th>Approved Budget</th>
<th>Actual as of 12/3/2019</th>
<th>Percentage Variance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Philanthropy Day sponsorships</td>
<td>44,000.00</td>
<td>41,700.00</td>
<td>-5.2%</td>
</tr>
<tr>
<td>Philanthropy Day registration</td>
<td>15,000.00</td>
<td>9,300.00</td>
<td>-38.0%</td>
</tr>
<tr>
<td>Philanthropy Day in-kind</td>
<td>16,250.00</td>
<td>28,873.00</td>
<td>77.7%</td>
</tr>
<tr>
<td>Monthly chapter program meetings</td>
<td>11,000.00</td>
<td>8,223.00</td>
<td>-25.2%</td>
</tr>
<tr>
<td>Monthly chapter program sponsor</td>
<td>4,050.00</td>
<td>2,250.00</td>
<td>-44.4%</td>
</tr>
<tr>
<td>Fundraising Day Wisconsin</td>
<td>45,000.00</td>
<td>69,790.83</td>
<td>55.1%</td>
</tr>
<tr>
<td>Professional Development</td>
<td>3,300.00</td>
<td>430.00</td>
<td>-87.0%</td>
</tr>
<tr>
<td>Young Professionals</td>
<td>200.00</td>
<td>145.00</td>
<td>-27.5%</td>
</tr>
<tr>
<td>Job Board</td>
<td>6,750.00</td>
<td>6,135.00</td>
<td>-9.1%</td>
</tr>
<tr>
<td>AFP member rebate</td>
<td>9,800.00</td>
<td>9,000.00</td>
<td>-8.2%</td>
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<tr>
<td>Be the Cause rebate</td>
<td>220.00</td>
<td>238.50</td>
<td>8.4%</td>
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<tr>
<td>Interest</td>
<td>525.00</td>
<td>1,026.99</td>
<td>95.6%</td>
</tr>
<tr>
<td><strong>Total revenue</strong></td>
<td><strong>156,095.00</strong></td>
<td><strong>177,112.32</strong></td>
<td><strong>13.5%</strong></td>
</tr>
</tbody>
</table>

### Expenses:

<table>
<thead>
<tr>
<th>Description</th>
<th>Approved Budget</th>
<th>Actual as of 12/3/2019</th>
<th>Percentage Variance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Philanthropy Day</td>
<td>24,850.00</td>
<td>19,072.18</td>
<td>-23.3%</td>
</tr>
<tr>
<td>Philanthropy Day in-kind</td>
<td>16,250.00</td>
<td>28,873.00</td>
<td>77.7%</td>
</tr>
<tr>
<td>Programs</td>
<td>12,875.00</td>
<td>12,705.63</td>
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<tr>
<td>Fundraising Day Wisconsin</td>
<td>40,800.00</td>
<td>53,925.62</td>
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<td>Professional Development</td>
<td>2,600.00</td>
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<td>Communications</td>
<td>8,500.00</td>
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<tr>
<td>Scholarships</td>
<td>13,000.00</td>
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<td>Membership</td>
<td>2,550.00</td>
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<tr>
<td>Diversity</td>
<td>100.00</td>
<td>0</td>
<td>-100.0%</td>
</tr>
<tr>
<td>Young Professionals</td>
<td>900.00</td>
<td>913.54</td>
<td>1.5%</td>
</tr>
<tr>
<td>Administration</td>
<td>33,670.00</td>
<td>37,703.55</td>
<td>12.0%</td>
</tr>
<tr>
<td><strong>Total expenses</strong></td>
<td><strong>156,095.00</strong></td>
<td><strong>164,110.17</strong></td>
<td><strong>5.1%</strong></td>
</tr>
</tbody>
</table>

**Net income**

0 13,002.15
## 2020 Proposed Budget

### Revenue:
- Philanthropy Day sponsorships: $44,250.00
- Philanthropy Day registration: $15,000.00
- Philanthropy Day in-kind: $26,400.00
- Monthly chapter program meetings: $11,000.00
- Monthly chapter program sponsor: $3,600.00
- Fundraising Day Wisconsin: $67,000.00
- Professional Development: $600.00
- Young Professionals: $300.00
- CFRE review course: $3,600.00
- Job Board: $5,900.00
- AFP member rebate: $8,500.00
- Be the Cause rebate: $220.00
- Interest: $890.00

**Total revenue:** $187,260.00

### Expenses:
- Philanthropy Day: $24,700.00
- Philanthropy Day in-kind: $26,400.00
- Programs: $12,600.00
- Fundraising Day Wisconsin: $59,800.00
- Professional Development: $600.00
- Communications: $6,800.00
- Scholarships: $14,560.00
- Membership: $1,250.00
- Diversity: $100.00
- Young Professionals: $700.00
- CFRE review course: $3,120.00
- Administration: $36,630.00

**Total expenses:** $187,260.00

**Net income:** $0
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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