



AFP MADISON CHAPTER

2022 ANNUAL REPORT

DECEMBER 13, 2022



IDEA HIGHLIGHTS

- The chapter achieved the IDEA Champion designation again this year
- The AFPGM board created a 2022 Strategic Plan goals from the Diversity Action Plan. This includes:
 - Exploring partnership opportunities with additional local organizations
 - Increase NPD outreach to organizations that employ and advocate for underrepresented groups
 - Highlight the diversity of our AFP membership and the Madison Community through storytelling.
 - Feature program content and speakers from the BIPOC, LGBTQIA+, disabled, and other historically excluded communities - but not simply to speak about diversity, equity and inclusion



MEMBERSHIP & ENGAGEMENT HIGHLIGHTS

The Membership & Engagement Committee supported Chapter members and friends alike, through 2022 by:

- Returning to in-person networking events, supplemented by occasional Zoom sessions
- Networking events took place at local coffee shops each month, as well as after-work options



Current AFP Greater Madison Chapter Members as of 11/30/22: 154

SCHOLARSHIP HIGHLIGHTS

The Scholarship Committee has had an epic year in 2022:

- In May, \$3,500 was awarded to four members to attend the AFP ICON 2022 in Las Vegas.
- \$500 award for a member to attend a conference related to fundraising.
- New in 2022, four membership stipends awarded to cover dues for one year.
- Awards forthcoming for Fundamentals in Fundraising & Boris Frank "Emerging Leaders" Scholar



PROFESSIONAL DEVELOPMENT HIGHLIGHTS

The Professional Development Committee was busy in 2022 and provided a full suite of programs:

- 10 Programs Included:
 - 5 Virtual
 - 5 In-person
- Topics included:
 - Making the Ask, Cryptocurrency, Community Centric Fundraising, CFRE, Charitable Giving Advocacy, and more!
- We heard you! Next year we'll be all in-person for Professional Development Programs!



COMMUNICATIONS HIGHLIGHT


The Communications Committee released 9 e-newsletters throughout the year:

- Spotlights on diverse members of our fundraising community
- Features written by our members (Over 45 contributed)
- Shared 2021 National Philanthropy Award winners and their stories
- Welcomed two new contributing committee members

Special Feature
Transformational Philanthropy: We See You, We Trust You
 By: Jill Pfeiffer

A special piece written by Jill Pfeiffer, UWCA Madison, Development & Marketing Director.


Thank you, Jill, for sharing your insight into philanthropy and the changes that we can all make.



I always knew philanthropy to be honorable and critical to our sector, helping to fulfill the endless need in our community and beyond. However, in the last two years, I have witnessed acts of transformational philanthropy that have helped to manifest deep, meaningful equity that have taken YWCA Madison's mission to new heights under the bold vision of our CEO.

[Read More...](#)


Celebrating Hispanic Heritage Month



Each year, National Hispanic Heritage Month is recognized from September 15th to October 15th. Hispanic Heritage Month was established to celebrate the incredible contributions of Hispanic Americans to the history, culture, and achievements of the United States. In honor of Hispanic Heritage Month, the AFP Greater Madison Chapter sat down for a conversation with Baltazar De Anda Santana, Executive Director and Co-Founder of the Latino Academy of Workforce Development, Inc.

[READ MORE...](#)


Pursuing your CFRE?



Creal Zearing (Gathering Waters) and Lynn Perez-Hewitt (Hewitt Consulting Enterprises) recently started a CFRE (Certified Fund Raising Executive) monthly working group that is intended to bring together those in the greater Madison community looking to learn more about and pursue their CFRE certification. Join this dynamic duo on the second Tuesday of every month from 4-5 pm!

[READ MORE...](#)

Eliza's Art and Giving Spirit Recognized at 2021 National Philanthropy Day



With National Philanthropy Day 2022 on the horizon (November 10 at the Overture Center) we wanted to continue to honor our 2021 honorees! This month, we spotlight Eliza Gepner and her beautiful, unique art. Eliza was celebrated as the 2021 Outstanding Youth in Philanthropy Award after being nominated by MOM (Middleton Outreach Ministry).

[READ MORE...](#)



AFP
 Association of Fundraising Professionals
 Greater Madison Chapter

Award-winning connection: Kelley and Creal share a friendship and passion




Kelley Van Egeren, the Director of Stewardship and Development, was named Outstanding Fundraising Professional at last November's National Philanthropy Day awards. She was nominated by former colleague and friend, Creal Zearing, the Director of Philanthropy at Gathering Waters.

We asked them to share about their connection and a little about their environmental fundraising and work in the community.

MENTORSHIP PROGRAM HIGHLIGHTS

- Eva Wingren & Tom Linfield
- Graham Washburn & Michael George
- Karime Pérez Jaime & Jennifer Jeffress
- Cory Anshus & Becky Mulhern
- Marcos Lozano & Megan Van Thomme
- Clint Walz & Benson Gardner



"This is my first year as a member of AFP and I was excited to learn about the program. My first nonprofit job was overwhelming as I was asked to do a lot with very little training/resources. In that time, I relied on making connections via LinkedIn to pose questions. I liked the opportunity to share my knowledge and resources with someone newer in the field."

- Megan Van Thomme, American Red Cross of Wisconsin

CAMPAIGN HONOR ROLL

Jen Allen

Jen Davie, CFRE

Angela Davis

Mary Donahue

Natalie Glumm

Paul D. Harrison, CFRE

Susanna Quinn Heneghan

Kirsten Houghton, CPA

Anna January

Erin Krynski

Elizabeth Larson

Sarah Linn

David Mossner, CFRE

Max Nguyen

Lynn Perez-Hewitt

Jamie Quam

Elissa Russell

Sean Sobecki

Jonathan Solari

Lizabeth Tolles

Janie Winston

Debra Wolniak

Creal Zearing



Thank you to all of the donors who have already contributed to the AFP Foundation's Be the Cause campaign in 2022.

These dollars support scholarships, diversity efforts, and industry research, both locally and internationally.



2021 ANNUAL MEETING MINUTES



Minutes of the Association of Fundraising
Professionals - Greater Madison Chapter
Annual Meeting
December 14, 2021 – 9:00 a.m.
Remote Meeting via Zoom

Call to Order, Sarah Linn

President, Sarah Linn, called the meeting to order remotely via Zoom, at 9:05 AM. A quorum was present (33 total attendees – 26 members attended, 7 non-members attended).

IDEA Highlights

The AFP Greater Madison Chapter received the IDEA Designation again this year! The IDEA Champion Designation recognizes those chapters who have accomplished many of the key objectives outlined in the Promote Inclusion, Diversity, Equity and Access strategic pathway.

To ensure our Chapter is actively working to promote IDEA across all committees, our Chapter's IDEA Officer, Arlen Moss met with each Committee Chair and discussed how to approach their tasks through an IDEA lens.

The Board also created a 2021 Diversity Action Plan that includes goals to partner with local organizations, increase NPD outreach to organizations that advocate for underrepresented groups, and a wider diversity of speakers.

A JEDI Intensive Course is in development, with AFP Member, Daniel Sims.

Membership & Engagement

Due to the current COVID climate, we had to shift our Membership & Engagement Committee events to a virtual format. The committee hosted three virtual social hours, helping to create professional connections and lasting friendships.

The Membership & Engagement Committee also continued to help the AFPGM community with questions and communications between Chapter members and AFP Global.

Scholarship Update

In a challenging year, the Chapter was still able to assist two members renew their CFRE credentials.

The Scholarship Committee updated the overall scholarship guidelines to simplify the application process, allow for more accessibility within the fundraising community, and ensure diversity of recipients.

To honor the life and legacy of Boris Frank, the Boris Frank Scholarship was created. The scholarship will be for "emerging leaders" and provide the recipients professional development opportunities and engagement with AFPGM.

Professional Development

This year featured a series of successful programs and roundtables in a virtual setting – all sessions were free! There was also one roundtable that was hosted in person. Based on the Chapter survey, programs and roundtables will continue to take place virtually.

- Professional Development Chair: Creal Zearing
- Scholarship Chair: Angela Davis
- IDEA Officer: Arlen Moss
- Mentorship Officer: Lily Mize
- Young Professionals Officer: Sean Sobacki
- At-Large Member: Jamie Quam
- At-Large Member: Mary Donahue
- At-Large Member: Natalie Gnumm
- At-Large Member: Nina Gehan
- At-Large Member: Jonathan Solari
- At-Large Member: Beth Larson

Motion: Being no further discussion, Sarah Linn called for a motion to approve the 2022 Board of Directors. Lynn Perez-Hewitt moved to accept the report, where Kristi Shepard seconded. **The motion passes unanimously (21 members voted "yes" and 5 abstained).**

National Philanthropy Day Update, Elissa Russell

National Philanthropy Day was offered as a hybrid event this year, with in-person attendees joining at the Overture Center for the Arts and virtual attendees enjoying the presentation online. Overall, there were 175 attendees (145 attendees in-person and 30 online attendees).

The event featured two new hosts, Sabrina Madison and Jason Ilstrup. The two created a joy-filled event!

Thank you to our 2021 National Philanthropy Day Sponsors: CUNA Mutual Group, Madison Community Foundation, Wisconsin Foundation & Alumni Association, Foundation for Madison's Public Schools, MG&E, Park Bank, SVA, Madison Symphony Orchestra, the QTI Group, United Way of Dane County, and Overture Center for the Arts.

Fundraising Day Wisconsin, Jen Davie

Fundraising Day Wisconsin was created to bring national speakers and trainers to Wisconsin at an affordable price. We are grateful this year's virtual event allowed us to bring speakers from across the U.S. to local audiences! There were sixty virtual attendees.

This year's event was a series of five webinars. The speakers included: Speakers included: Terry Broussard Williams, Ken Miller, CFRE, Courtney Polster, CFRE, Andrea Cota, Birgit Burton, and Liz LeClair.

Thank you to our 2021 Fundraising Day Wisconsin Sponsors: CUNA Mutual Group, Wisconsin Foundation & Alumni Association, Numbers 4 Nonprofits, MG&E, Park Bank, SVA.

Adjournment, Sarah Linn

Sarah called for a motion to adjourn the formal meeting but did encourage participants to join us in breakout rooms for the remainder of the meeting time!

Motion: Anna January moved to adjourn the meeting, and Angela Davis seconded. **The motion passed unanimously.** Sarah adjourned the meeting at 9:33 AM.





VOTE NEEDED!

2022 BUDGET

	Actual (As of 12/3/22)	Budget	Over (Under) Budget	% of Budget
Income				
AFP - Member Rebate	6,075.00	6,500.00	(425.00)	93.46%
AFP Job Board	7,955.00	5,000.00	2,955.00	159.10%
Be the Cause Chapter Rebate	550.06	100.00	450.06	550.06%
Total CFRE Review Course	-	3,600.00	(3,600.00)	0.00%
Contributions	151.52	-	151.52	
Total Fundraising Day Wisconsin	-	11,500.00	(11,500.00)	0.00%
Interest Income - Money Market	263.75	463.00	(199.25)	56.97%
Total Philanthropy Day Revenue	27,652.29	38,000.00	(10,347.71)	72.77%
Total Professional Development Revenue	2,181.00	13,500.00	(11,319.00)	16.16%
Total Income	44,828.62	78,663.00	(33,834.38)	56.99%
Expenses				
Total Administration	32,690.00	29,343.00	3,347.00	111.41%
Total CFRE Review Course Expense	-	3,120.00	(3,120.00)	0.00%
Total Communications	-	2,900.00	(2,900.00)	0.00%
Total Fundraising Day Wisconsin Exp.	-	11,500.00	(11,500.00)	0.00%
Total Philanthropy Day	15,670.14	15,500.00	170.14	101.10%
Total Professional Development	1,555.95	6,300.00	(4,744.05)	24.70%
Scholarships	4,505.00	10,000.00	(5,495.00)	45.05%
Total Expenses	54,421.09	78,663.00	(24,241.91)	69.18%
Net Operating Income	(9,592.47)	-	(9,592.47)	
Net Income	(9,592.47)	-	(9,592.47)	



2023 PROPOSED BUDGET

Income	
Philanthropy Day Sponsorships	20,000.00
Philanthropy Day Registration	13,000.00
Fundraising Day Wisconsin Sponsorships	18,000.00
Fundraising Day Wisconsin Registration	41,250.00
Fundamentals of Fundraising	3,900.00
Professional Development Roundtables	600.00
Professional Development Monthly Meetings Sponsorship	2,700.00
Professional Development Monthly Meetings Registration	6,000.00
AFP - Member Rebate	6,300.00
AFP Job Board	7,000.00
Be the Cause Chapter Rebate	250.00
Interest Income	250.00
Total Income	119,250.00
Expenses	
Philanthropy Day	15,757.00
Fundraising Day Wisconsin	49,505.00
Fundamentals of Fundraising	3,260.00
Professional Development	6,860.00
Communications	200.00
Scholarships	10,000.00
Administration	33,266.00
Total Expenses	118,848.00
Net Income	402.00



VOTE NEEDED!

2022 BOARD OF DIRECTORS

President: Sarah Linn

President-elect: Anna January

Immediate Past President: Janie Winston

Secretary: Jen Allen

Treasurer: Erin Krynski

Communications Chair: Max Nguyen

Membership & Engagement Chair: Lynn Perez-Hewitt

National Philanthropy Day Chair: Natalie Glumm

Professional Development Chair: Creal Zearing

Scholarship Chair: Angela Davis

Diversity Officer: Arlen Moss

Mentorship Officer: Lily Mize

YP Officer: Sean Sobecki

At-Large Member: Mary Donahue

At-Large Member: Nina Gehan

At-Large Member: Beth Larson

At-Large Member: Jamie Quam

At-Large Member: Elissa Russell

At-Large Member: Jonathan Solari



THANK YOU!!

Big thank you to the following outgoing board members:

- Immediate Past President: Janie Winston
- Diversity Officer: Arlen Moss
- Mentorship Officer: Lily Mize
- YP Officer: Sean Sobecki
- At-Large Member: Nina Gehan
- At-Large Member: Jonathan Solari



2023 BOARD OF DIRECTORS PROPOSED SLATE

President: Anna January

President-elect:

Immediate Past President: Sarah Linn

Secretary: Jen Allen

Treasurer: Erin Krynski

Communications Chair: Max Nguyen

Membership & Engagement Chair: Lynn Perez-Hewitt

National Philanthropy Day Chair: Natalie Glumm

Professional Development Co-Chair: Creal Zearing

Professional Development Co-Chair: Jamie Quam

Scholarship Co-Chair: Angela Davis

Scholarship Co-Chair: Beth Larson

Mentorship Officer: Elissa Russell

At-Large Member: Mary Donahue

At-Large Member: Emily Wills

IDEA Officer:

Young Professionals Officer:

At-Large Member:





Motion first...

**VOTE
NEEDED!**

“GOOD ACTIONS

GIVE STRENGTH TO OURSELVES & INSPIRE

GOOD
ACTIONS

IN OTHERS.” PLATO

35th Annual AFP Greater Madison National Philanthropy Day®



NATIONAL PHILANTHROPY DAY

- The AFP Greater Madison Chapter hosted the 35th National Philanthropy Day on November 10th at the beautiful Overture Center for the Arts
- This year's event was held in-person and had 225 attendees
- The two hosts, Kristen Houghton and Jason Ilstrup, lead the event, celebrating this year's honorees and their accomplishments!



2022 NATIONAL PHILANTHROPY DAY AWARD WINNERS

Outstanding Individual Philanthropist: John and Jo Ellen McKenzie, Nominated by: Janus Galleries

Outstanding Small Business: ProClip USA, Nominated by: Dane County Humane Society and the River Food Pantry

Outstanding Grassroots Fundraisers: ReMitts, Nominated by: Ann Nelson

Outstanding Volunteer Fundraiser: Londa J. Deweyl, Nominated by: United Way of Dane County

Outstanding Large Business: Springs Window Fashions, Nominated by: Middleton Outreach Ministry (MOM) and RISE Wisconsin

2022 NATIONAL PHILANTHROPY DAY AWARD WINNERS

Outstanding Philanthropic Foundation: Big Dreamers United, Nominated by: Quiet Santa and the Levy Giving Fund

Outstanding Achievement in Justice, Equity, Diversity, and Inclusion: YWCA Madison, Nominated by: Joyce Dieter

Lifetime Achievement: McKenzie Family (John and Jo Ellen, Richard and Jean, Lisa and John Livesey, and MaryAnn McKenzie), Nominated by: Wisconsin Foundation and Alumni Association; Boys & Girls Club of Dane County

Outstanding Fundraising Professional: Michael Johnson, Boys & Girls Club of Dane County
Nominated by: Madison Community Foundation



THANK YOU TO OUR 2022 SPONSORS

SILVER SPONSORS



EVENT SPONSOR



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PROGRAM SPONSORS



FUNDRAISING DAY WISCONSIN

- FDW is coming back!
- AFP Greater Madison and other Wisconsin chapter leadership folks have been meeting quarterly to discuss many topics, including this event
- Interest in supporting and participating in the event from ALL chapters
- Statewide survey to gather feedback
- Looking at cost and profit sharing ideas
- Starting planning for an in-person event June 2023 to be held in Madison, with our chapter taking the lead this year





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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