



# **AFP MADISON CHAPTER**

## **2021 ANNUAL REPORT**

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DECEMBER 14, 2021



# IDEA HIGHLIGHTS

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- The chapter achieved the IDEA Champion designation again this year
- Each AFPGM Committee met with Arlen Moss, our IDEA Officer, and explored ways that they could approach their work differently this year, examining all aspects of their committee's tasks through an IDEA lens
- The AFPGM board created a 2021 Diversity Action Plan with goals like:
  - Exploring partnership opportunities with additional local organizations
  - Increase NPD outreach to organizations that employ and advocate for underrepresented groups
  - Consider speaker representation to present board range of perspectives
- Launched development of a JEDI Intensive Course in partnership with Daniel Sims





# MEMBERSHIP & ENGAGEMENT HIGHLIGHTS

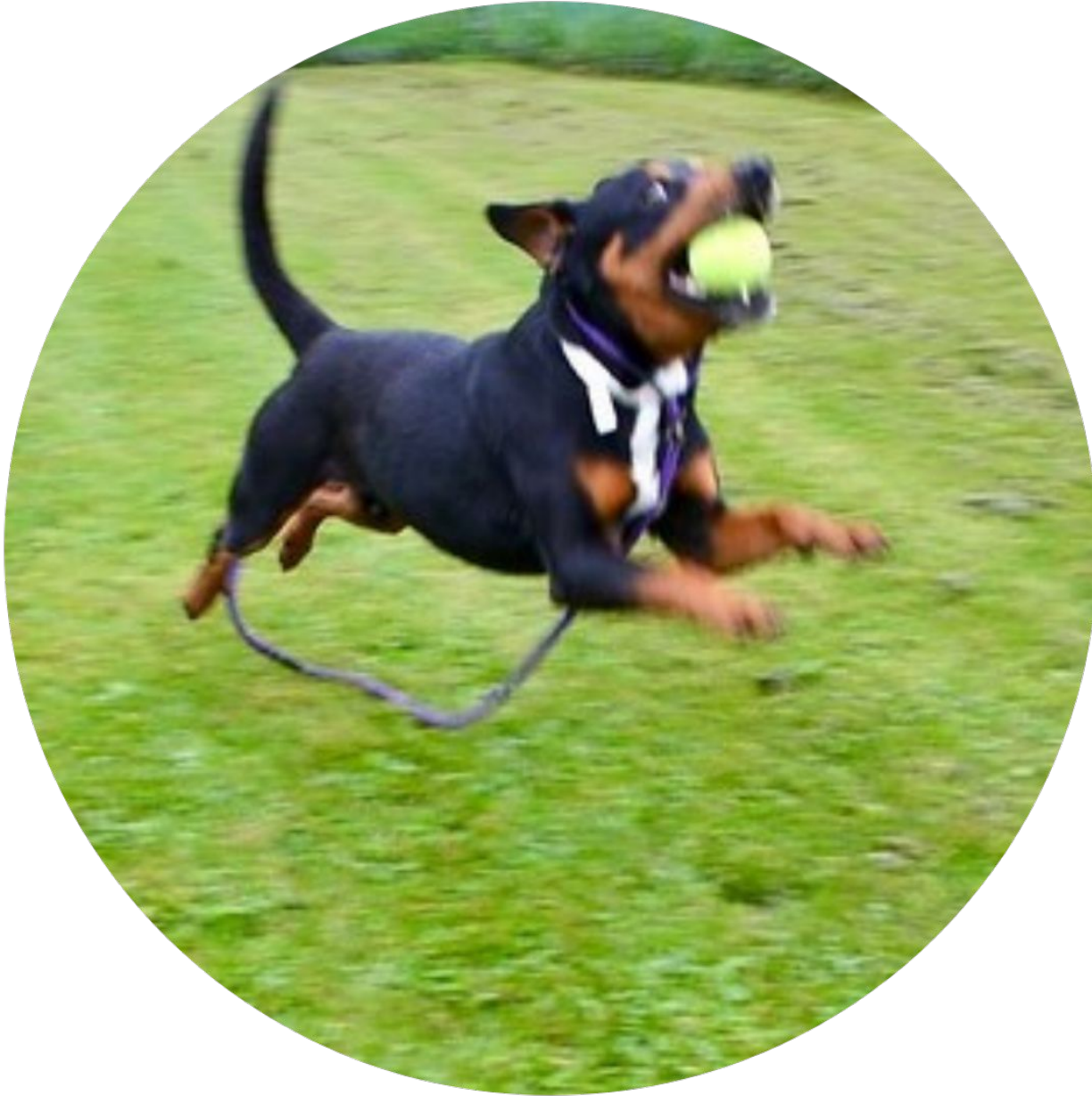
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Our Membership Committee supported Chapter members and friends alike, through 2021 by:

- Hosting three virtual social hours for our members and friends to build professional connections and lasting friendships
- Continuing to help Greater Madison's fundraising community with questions and communications between Chapter members and AFP Global



# DRAWING!!



# SCHOLARSHIP HIGHLIGHTS

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- Despite the challenges of 2021, our Chapter was able to assist two members renew their CFRE credentials
- Updated our overall general scholarship guidelines
- Added additional benefits thanks to those that honored the life of Boris Frank through memorial gifts to the "Emerging Leaders" Scholarship
- A new user-friendly Google Form has been created to simplify the application process





# PROFESSIONAL DEVELOPMENT HIGHLIGHTS

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- We had a successful series of programs and roundtables in a virtual setting for 2021. These were all free!
- Plus, one in-person roundtable in August
- Remained dedicated to the IDEA lens with topics ranging from advocating for anti-racist workplaces, discussions on Deb Biddle's presentation, uncomfortable conversations with donors, and capitol projects
- Focused on maintaining a diverse group of experts and panelists
- Based on survey results, we will continue to meet virtually





*Thank you 2021-2022 sponsors!*



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# COMMUNICATIONS HIGHLIGHT

The Communications Committee released seven e-newsletters throughout the year, with:

- Spotlights on diverse members of our fundraising community - something we hope to continue as we move forward with IDEA initiatives
- Increased focus on highlighting members and professional development opportunities through Facebook page
- Newsletter articles written by and for our Greater Madison members



**Hispanic Heritage Month: Recognizing the Difference Makers**

Hispanic Heritage Month takes place from Sept. 15 through Oct. 15 this year. We celebrate Hispanic Heritage Month to recognize the achievements and contributions of Hispanic American champions who have inspired others to achieve success. Marcos, Karime, and Faatima embody this spirit and are moving the **Madison** and Dane County forward at their respective organizations (Centro Hispano and Agrace) in helping Hispanic Americans and their families. Thanks for everything you do!

[READ MORE...](#)

**Member Spotlight: Paul Harrison**

This month we highlight Paul Harrison, the longtime Development and Communications Director for Access Health Centers of 15+ years in **Madison**. Check out his lengthier feature in **Madison Magazine** [here](#). Thanks for your commitment and good works in our community, Paul!

Paul Harrison's introduction to philanthropy came early on during his childhood. "It comes from how you were raised and what was in front of you." Inspired by his experiences growing up, Paul has dedicated his career to cultivating community through philanthropy.

[READ MORE...](#)

Let's keep this member spotlight rolling! Thanks Patricia at Middleton Outreach Ministry.

"One of the first things that people get from development is 'oh, I hate to ask people for money.' But, when you realize and it finally hits you that 'it's not for me - it's for something I believe in and that the donor believes in' then it becomes a really fulfilling job." 😊

Hear more: <https://www.afpmadison.org/.../member-spotlight-patricia...>



# MENTORSHIP PROGRAM HIGHLIGHTS

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- We launched our second cohort of mentor and mentee pairs in May of 2021
- Our program expanded from 4 pairs in its inaugural year to 6 pairs this year
- Pairs continue to get creative in how they meet - everything from going on hikes together, to Zoom and phone meetings, to old-fashioned grabbing a coffee together



*"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*





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# CAMPAIGN HONOR ROLL

David E. Allen

Jen Allen

Caitlin Behncke

Ash Collins

Jen Davie, CFRE

Angela Davis

Lisa Gundlach

Ruth K. Hansen, CFRE

Paul D. Harrison, CFRE

Marcy Heim, CFRE

Kirsten Houghton, CPA

Anna January

Sarah Linn

Lily Mize

David Mossner, CFRE

Max Nguyen

Tracy Phillippi

Elissa Russell

Sean Sobecki

Martha Vukelich-Austin

Julie Wiedmeyer

Janie Winston

Debra Wolniak

Chris Ziemba



Thank you to all of the donors who have already contributed to the AFP Foundation's Be the Cause campaign in 2020.

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

# 2020 ANNUAL MEETING MINUTES

AFP Greater Madison Chapter  
December 15, 2020  
12:00 pm

\*This meeting was held virtually due to extenuating circumstances of the COVID-19 Pandemic.

President Janie Winston calls the meeting to order at 12:03 pm. She welcomed members and guests to the annual meeting.

She introduced the program that will be following the annual meeting and thanked the Alliant Energy Foundation for their sponsorship of the program.

Janie acknowledged outgoing board members: Jen Davie, Halley Pucker, Marissa DeGroot, Julia O'Donnell, Jacob Immel, Mindy Petersen, David Mossner, Kristi Shepard, Julie Ehrke, Courtney Polster.

Janie presented the slate of officers for the 2021 Board of Directors.

## Officers

President: Sarah Linn

President-elect: Anna January

Immediate Past President: Janie Winston

Secretary: Jen Allen

Treasurer: Caitlin Behncke

National Philanthropy Day Chair: Elissa Russell

Professional Development Chair: Janie Winston

Scholarship Chair: Jamie Schneider

Diversity Officer: Arlen Moss

Mentorship Officer: Lily Mize

YP Officer: Sean Sobecki

At-Large Member: Tracy Phillippi

At-Large Member: Mary Donahue

At-Large Member: Martha Vukelich-Austin

At-Large Member: Nina Gehan

At-Large Member: Jonathan Solari

## Committee Chairs and Officers

Communications Chair: Max Nguyen

Fundraising Day Wisconsin Chair: Aimee Furie

Membership & Engagement Chair: Ash Collins

Janie calls for approval of the 2021 Board of Directors slate as presented. Members voice their approval by responding "Yes" in the chat window. Members vote yes and the 2021 Board of Directors slate is approved.

Janie continued to present the 2020 Year in Review with highlights of the committee and Chapter activities. This also included a report of the 2020 YTD budget and the 2021 Budget.

Sarah Linn, the President-Elect, acknowledged Janie's work as president of the Chapter for the past two years.

Janie calls to close the meeting and move into the December program at 12:17 pm.



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# 2021 BUDGET

	Actual (As of 12/12/21)	Budget	Over (Under) Budget	% of Budget
<b>Income</b>				
AFP - Member Rebate	\$6,825.00	\$7,650.00	-\$825.00	89.22%
AFP Job Board	\$7,125.00	\$4,400.00	\$2,725.00	161.93%
Contributions	\$52,617.66		\$52,617.66	
Total Fundraising Day Wisconsin	\$11,380.14	\$18,000.00	-\$6,619.86	63.22%
Interest Income - Money Market	\$60.85	\$463.00	-\$402.15	13.14%
Total Philanthropy Day Revenue	\$29,377.50	\$25,750.00	\$3,627.50	114.09%
Total Professional Development Revenue	\$0.00	\$300.00	-\$300.00	0.00%
Program Income			\$0.00	
Total Program Income	\$1,280.00	\$4,200.00	-\$2,920.00	30.48%
<b>Total Income</b>	<b>\$108,666.15</b>	<b>\$60,763.00</b>	<b>\$47,903.15</b>	<b>178.84%</b>
<b>Expenses</b>				
Total Administration	\$29,281.33	\$32,044.00	-\$2,762.67	91.38%
Communications			\$0.00	
Total Communications	\$0.00	\$350.00	-\$350.00	0.00%
Total Fundraising Day Wisconsin Exp.	\$8,319.19	\$13,700.00	-\$5,380.81	60.72%
Total Membership	\$0.00	\$250.00	-\$250.00	0.00%
Total Philanthropy Day	\$11,650.34	\$1,969.00	\$9,681.34	591.69%
Total Programs	\$0.00	\$2,150.00	-\$2,150.00	0.00%
Total Scholarships	\$816.00	\$10,300.00	-\$9,484.00	7.92%
<b>Total Expenses</b>	<b>\$50,066.86</b>	<b>\$60,763.00</b>	<b>-\$10,696.14</b>	<b>82.40%</b>
<b>Net Operating Income</b>	<b>\$58,599.29</b>	<b>\$0.00</b>	<b>\$58,599.29</b>	
<b>Net Income</b>	<b>\$58,599.29</b>	<b>\$0.00</b>	<b>\$58,599.29</b>	

# 2022 PROPOSED BUDGET

<b>Revenue:</b>	
Philanthropy Day sponsorships	\$28,000.00
Philanthropy Day registration	\$10,000.00
Professional Dev - meeting fees	\$4,500.00
Professional Dev - meeting sponsors	\$3,600.00
Professional Dev - roundtables	\$600.00
Fundraising Day Wisconsin	\$11,500.00
CFRE review course	\$3,600.00
Job Board	\$5,000.00
AFP member rebate	\$6,500.00
Be the Cause rebate	\$100.00
Interest	\$463.00
<b>Total revenue</b>	<b>\$78,663.00</b>
<b>Expenses:</b>	
Philanthropy Day	\$15,500.00
Fundraising Day Wisconsin	\$11,500.00
Professional Development	\$6,300.00
Communications	\$2,900.00
Scholarships	\$10,000.00
CFRE review course	\$3,120.00
Administration	\$29,343.00
<b>Total expenses</b>	<b>\$78,663.00</b>
<b>Net income</b>	<b>\$0.00</b>



# DRAWING!!



# 2021 BOARD OF DIRECTORS

**President:** Sarah Linn

**President-elect:** Anna January

**Immediate Past President:** Janie Winston

**Secretary:** Jen Allen

**Treasurer:** Caitlin Behncke

Communications Chair: Max Nguyen

Fundraising Day Wisconsin Chair: Vacant

Membership & Engagement Chair: Ash Collins

National Philanthropy Day Chair: Elissa Russell

Professional Development Chair: Janie Winston

Scholarship Chair: Angela Davis

Diversity Officer: Arlen Moss

Mentorship Officer: Lily Mize

YP Officer: Sean Sobecki

At-Large Member: Tracy Phillippi

At-Large Member: Mary Donahue

At-Large Member: Martha Vukelich-Austin

At-Large Member: Nina Gehan

At-Large Member: Jonathan Solari



# THANK YOU!!

**Big thank you to the following outgoing board members:**

- Treasurer: Caitlin Behncke
- Membership & Engagement Chair: Ash Collins
- At-Large Member: Tracy Phillippi
- At-Large Member: Martha Vukelich-Austin





# 2022 BOARD OF DIRECTORS PROPOSED SLATE

**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: Elissa Russell

Professional Development Chair: Creal Zearing

Scholarship Chair: Angela Davis

IDEA Officer: Arlen Moss

Mentorship Officer: Lily Mize

Young Professionals Officer: Sean Sobecki

At-Large Member: Jamie Quam

At-Large Member: Mary Donahue

At-Large Member: Natalie Glumm

At-Large Member: Nina Gehan

At-Large Member: Jonathan Solari

At-Large Member: Beth Larson







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# NATIONAL PHILANTHROPY DAY

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- We offered a hybrid event - with in-person attendees joining us at Overture Center for the Arts, while virtual attendees enjoyed the presentation online
- Two new hosts, Sabrina Madison and Jason Ilstrup, helped us create a joy-filled event to celebrate our award winners
- We had 145 attendees attend in person as well as 30 online attendees



# 2021 NATIONAL PHILANTHROPY DAY AWARD WINNERS

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**Outstanding Individual Philanthropist:** Robert “Bob” Auerbach, Nominated by: UW Odyssey Project

**Outstanding Small Business:** Reynolds Transfer & Storage, Nominated by: The Road Home

**Outstanding Grassroots Fundraisers:** Bird Ross and Brenda Baker, Nominated by: Madison Community Foundation

**Outstanding Volunteer Fundraiser:** Elizabeth (Betsy) Huebel, Nominated by: Madison Public Schools Foundation, Inc.

**Outstanding Business:** UW Credit Union, Nominated by: United Way of Dane County



# 2021 NATIONAL PHILANTHROPY DAY AWARD WINNERS

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**Outstanding Philanthropic Foundation:** CUNA Mutual Group Foundation, Nominated by: East Madison Community Center

**Outstanding Youth in Philanthropy:** Eliza Gepner, Nominated by: MOM (Middleton Outreach Ministry)

**Lifetime Achievement:** Jane Coleman, Nominated by: Madison Community Foundation

**Outstanding Fundraising Professional:** Kelley Van Egeren, Nominated by: Aldo Leopold Nature Center



# THANK YOU TO OUR 2021 SPONSORS

## PRESENTING SPONSORS



## SILVER SPONSOR



## PLATINUM SPONSORS



## PROGRAM SPONSORS



## EVENT SPONSOR



# FUNDRAISING DAY WISCONSIN

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- FDW was created to bring national speakers and trainers to our backyard at an affordable price. We are grateful for the virtual platforms that allowed us to bring speakers from across the US to local audiences again this year in a five webinar series.
- Speakers included: Terry Broussard Williams, Ken Miller, CFRE, Courtney Polster, CFRE, Andrea Cota, Birgit Burton, and Liz LeClair
- Community Conversations were held after each webinar to give space for participants to share more ideas on the featured topic
- 60 individuals attended virtually this year



**Inclusion. Innovation. Inspiration.**

An AFP Greater Madison/Southeastern Wisconsin Partnership



# FUNDRAISING DAY WISCONSIN

*Thank you sponsors!*



# DRAWING!!

AND THANK YOU!





### **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

AFP Greater Madison Chapter  
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[www.afpmadison.org](http://www.afpmadison.org)  
(608) 421-3597





# Breakout Rooms

## THREE QUESTIONS FOR YOU:

- How is year-end going for you and your team?
- What was the most valuable lesson you learned in 2021?
- What are you looking forward to most in 2022?

