

AFP MADISON CHAPTER 2023 ANNUAL REPORT

DECEMBER 12, 2023



COMMUNICATIONS HIGHLIGHTS



The Communications Committee released 8 e-newsletters throughout 2023:

- Spotlights on diverse members of our fundraising community
- Features written by our members
 - Over 30 contributed!
- Shared 2022 National Philanthropy Award winners and their stories throughout the year
- Thank you to the five Communications Committee members:
 - Max Nguyen
 - Emily Willis
 - Elliott Valentine
 - Jen Allen
 - Pat McMurtrie



Spotlighting Oscar, Madison and 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 Oscar Mireles, Executive Director of both Omega School and LOUD (Latinos Organizing for Understanding and Development).



Help Mentees Bloom Through the AFP Mentorship Program

About to begin its third year, the AFP Great Madison Mentorship Program creates a unique opportunity for focused, long-term relationships between seasoned fundraising professionals and those just starting to carve out their path in the profession.



AFP ICON Scholarship Feature

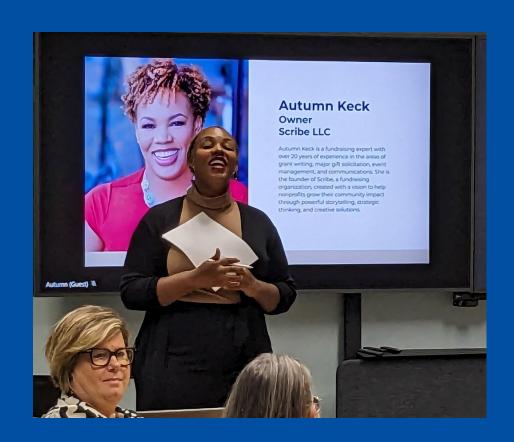
Annie Louis



Why Nonprofits Should Engage in Advocacy

IDEA HIGHLIGHTS

- Chapter received the IDEA Champion designation from Global again this year!
- Held listening sessions with AFP committees and individuals to evaluate opportunities to strengthen the Chapter's IDEA efforts
- Wrote letter of solidarity regarding Toronto Chapter
- Participated in AFP Global's IDEA Officer cohort on leveraging Global's IDEA tools
- Began outreach to current and prospective partners and members from historically underrepresented communities to learn more about their needs
- Featured content, speakers, and trainings that lift up the voices of historically excluded communities and challenge our sector to be more equitable



MEMBERSHIP & ENGAGEMENT HIGHLIGHTS

The Membership & Engagement Committee supported Chapter members in 2023 by:

- Staying connected with monthly Coffee Chats causal, no agenda, no RSVP events focused on conversations
- Reaching out to lapsed members with personal notes from Lynn Perez-Hewitt (Membership & Engagement Chair) and Anna January (Chapter President)

AFP Global Database migration led to difficulties pulling accurate membership data



Current AFP Greater Madison Chapter Members as of 11/30/23: 161

MENTORSHIP PROGRAM HIGHLIGHTS

The Mentorship Program TRIPLED the number of pairings year over year:

- In 2023, there were 19 mentor and mentee matches
- Hosted a social gathering in October at Delta Beer Lab where about ten people joined
- Committee met once this year to coordinate the matching process and work together to support the matches
 - If you are interested in volunteering with this committee in 2024, please let Pete Schwieger, incoming Mentorship Chair, know!



"Loved the mentorship program! Another way to connect our fundraising community and has helped inspire me to think creatively. Eric [Salisbury] and I have continued to connect even after we were "done" in the program. I lean on him for career decisions, fundraising tactics, and even some non-fundraising stuff like our shared love of country music."

PROFESSIONAL DEVELOPMENT HIGHLIGHTS

In 2023, the Professional Development Committee:

- Returned to in-person events!
- Hosted 6 lunches with speakers
- Led 5 roundtables at various non-profit locations
- Organized Fundamentals of Fundraising course

Thank you to:

- Committee Members
- Speakers
- Venue Hosts
- Madison College South Campus
- All of you!



Have a program idea for 2024? Send ideas to Creal Zearing at: Creal@gatheringwaters.org

SCHOLARSHIP HIGHLIGHTS

The Scholarship Committee has had an epic year in 2023:

- Two Inaugural Boris Frank "Emerging Leaders" Scholars
- Two AFP Membership Scholarships
- Seven Newcomers Attended Fundamentals in Fundraising Course (\$3,000 in awards)
- Five Stipends of \$1,000 Each to the attend the AFP ICON Conference
- \$500 Awarded for a Member to Attend a Conference Related to Fundraising
- \$875 CFRE Certification Fee Awarded to a member



CAMPAIGN HONOR ROLL

David Allen

Jen Allen

Breanne Chase

Jen Davie, CFRE

Angela Davis

Mary Donahue

Karen Gibbs

Natalie Glumm

Ruth Hanson

Marcy Heim, CFRE

Anna January

Erin Krysinski

Beth Larson

Sarah Linn

David Mossner, CFRE

Max Nguyen

Lynn Perez-Hewitt

Mikaela Powers

Mary Salisbury

Michael Sweitzer-Beckman

Emily Wills

Janie Winston

Lori Werbeckes

Creal Zearing

Chris Ziemba



Thank you to all of the donors who have already contributed to the AFP Foundation's Be the Cause campaign in 2023.

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



2022 ANNUAL MEETING MINUTES

Call to Order, Sarah Linn

President, Sarah Linn, called the meeting to order at 8:46 am. A quorum was present.

Membership & Engagement

Membership report was given. AFP GM ended 2022 with 154 members.

Scholarship Update

Scholarship report was given. Highlights in 2022 were announcing the recipients of the Boris Frank Scholarship and offering new membership stipends.

Professional Development

Professional Development report was presented. Meetings will move to in-person in 2023.

Communications

The Communications report was presented.

Mentorship Program

Mentorship report was presented.

2021 Annual Meeting Minutes, Anna January

Anna January (on behalf of Jen Allen, AFPGM Secretary) reviewed the meeting minutes from the 2021 Annual Meeting.

Motion: Being no further discussion, Sarah Linn called for a motion to approve the 2021 Annual Meeting Minutes. Gabriella Gerhardt moved to accept the report, where Emily Wills seconded. **The motion passes unanimously.**

2023 Budget, Jen Davie & Sarah Linn

Overall, the goal of creating the 2023 budget was to balance our revenue and expenses, and a hope to see an increase in sponsorship dollars.

Motion: Gabriella Gerhardt moved to approve the 2023 budget, where Adam Erdmann seconded. **This motion passed unanimously.**

2022 Board of Directors

The 2022 Board of Directors were recognized and thanked for their support of all the AFPGM activities this past year. A special thank you went out to the outgoing members of the Board.

2023 Proposed Slate of Board of Directors

The proposed <u>slate of Board of Directors for 2023</u> was presented.

Motion: Being no further discussion, Sarah Linn called for a motion to approve the 2023 Board of Directors. Gabriella Gerhardt moved to approve the 2023 board slate, where Janie Winston seconded. **This motion passed unanimously.**

National Philanthropy Day Update, Elissa Russell

National Philanthropy Day report was presented.

Fundraising Day Wisconsin, Jen Davie

Fundraising Day Wisconsin report was presented.

Adjournment, Sarah Linn

Sarah called for a motion to adjourn the formal meeting.

Motion: Anna January moved to adjourn the meeting, and Adam Erdmann seconded. **The motion passed unanimously.** Sarah adjourned the meeting at 9:13 AM.





VOTE NEED!



2023 BUDGET

			Over (Under)	
	Actual (As of 12/1/23)	Budget	Budget	% of Budget
Income				
AFP - Member Rebate	6,670	6,300	370	105.9%
AFP Job Board	5,570	7,000	(1,430)	79.6%
Be the Cause Chapter Rebate	-	250	(250)	0.0%
Total Fundamentals in Fundraising	6,360	3,900	2,460	163.1%
Total Fundraising Day Wisconsin	33,295	59,250	(25,955)	56.2%
Interest Income - Money Market	1,103	250	853	441.2%
Total Philanthropy Day Revenue	37,735	33,000	4,735	114.3%
Total Professional Development Revenue	5,310	9,300	(3,990)	57.1%
Total Income	96,043	119,250	(23,207)	80.5%
Expenses				
Total Administration	32,172	33,266	(1,094)	96.7%
Total Communications	-	200	(200)	0.0%
Total Fundamentals in Fundraising	1,963	3,260	(1,297)	60.2%
Total Fundraising Day Wisconsin	29,123	49,505	(20,382)	58.8%
Total Philanthropy Day	17,628	15,757	1,871	111.9%
Total Professional Development	3,255	6,410	(3,155)	50.8%
Scholarships	1,190	10,000	(8,810)	11.9%
Total Expenses	85,331	118,398	(33,067)	72.1%
Net Income	10,712	852	9,860	



2024 PROPOSED BUDGET

Income	
Philanthropy Day Sponsorships	20,000
Philanthropy Day Registration	13,600
Fundraising Day Wisconsin Sponsorships	10,000
Fundraising Day Wisconsin Registration	34,000
Fundamentals of Fundraising	3,900
Professional Development Roundtables	500
Professional Development Monthly Meetings Sponsorship	1,000
Professional Development Monthly Meetings Registration	4,000
AFP - Member Rebate	6,300
AFP Job Board	9,000
Be the Cause Chapter Rebate	250
Interest Income	500
Total Income	103,050
Total Income	103,050
Total Income Expenses	103,050
	103,050 14,457
Expenses	
Expenses Philanthropy Day	14,457
Expenses Philanthropy Day Fundraising Day Wisconsin	14,457 34,550
Expenses Philanthropy Day Fundraising Day Wisconsin Fundamentals of Fundraising	14,457 34,550 3,400
Expenses Philanthropy Day Fundraising Day Wisconsin Fundamentals of Fundraising Professional Development	14,457 34,550 3,400 4,150
Expenses Philanthropy Day Fundraising Day Wisconsin Fundamentals of Fundraising Professional Development Communications	14,457 34,550 3,400 4,150 200
Expenses Philanthropy Day Fundraising Day Wisconsin Fundamentals of Fundraising Professional Development Communications Scholarships	14,457 34,550 3,400 4,150 200 10,000
Expenses Philanthropy Day Fundraising Day Wisconsin Fundamentals of Fundraising Professional Development Communications Scholarships Mentorship	14,457 34,550 3,400 4,150 200 10,000 250





VOTE NEED!

January 2023 Fundamentals of Fundraising Cohort



2023 BOARD OF DIRECTORS

• President: Anna January

President-Elect: Mike Sweitzer-Beckman

Immediate Past President: Sarah Linn

• Secretary: Jen Allen

• Treasurer: Erin Krysinski

• Communications Chair: Max Nguyen

• Membership & Engagement Chair: Lynn Perez-Hewitt

National Philanthropy Day Chair: Natalie Glumm

Professional Development Chair: Creal Zearing

Scholarship Co-Chair: Angela Davis

Scholarship Co-Chair: Beth Larson

Mentorship Officer: Mike Sweitzer-Beckman

IDEA Officer: Mary Salisbury

At-Large Member: Breanne Chase

At-Large Member: Mary Donahue

At-Large Member: Karen Gibbs

At-Large Member: Mikaela Powers

At-Large Member: Emily Willis





THANK YOU!!

Big thank you to the following outgoing board members:

- Immediate Past President: Sarah Linn
- Membership & Engagement Chair: Lynn
 Perez-Hewitt
- Scholarship Co-Chair: Angela Davis
- At-Large Member: Mary Donahue
- At-Large Member: Mikaela Powers



2024 BOARD OF DIRECTORS PROPOSED SLATE

President: Mike Sweitzer-Beckman

President-Elect: Beth Larson

Past President: Anna January

Secretary: Jen Allen

• Treasurer: Erin Krysinski

Communications Chair: Max Nguyen

IDEA Officer: Mary Sailsbury

• Membership & Engagement Chair: Breanne Chase

• Mentorship Chair: Pete Schwieger

National Philanthropy Day Chair: Natalie Glumm

Professional Development Chair: Creal Zearing

Scholarship Chair: Beth Larson

Young Professionals Officer: Aleeh Schwoerer

At-Large Member: Karen Gibbs

At-Large Member: Caitlin Ryan

At-Large Member: Courtney Spilker

At-Large Member: Emily Wills

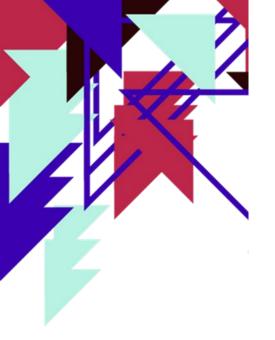




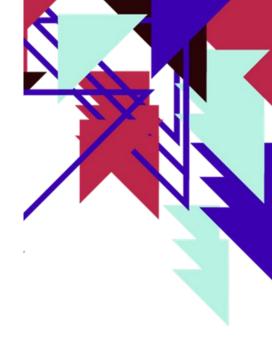


VOTE NEED!





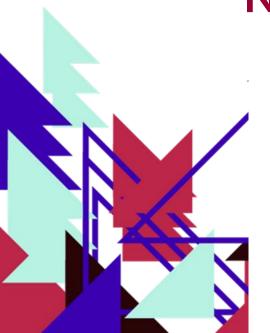
36th ANNUAL ASSOCIATION OF FUNDRAISING PROFESSIONALS GREATER MADISON



NATIONAL PHILANTHROPY DAY®

HONOREE LUNCHEON











NATIONAL PHILANTHROPY DAY®

- The AFP Greater Madison Chapter hosted the 36th National Philanthropy Day on November 9th at the beautiful Overture Center for the Arts
- This year's event was held in-person and had 278 attendees
- This year the event was hosted by two of our board members, Mike Sweitzer-Beckman, and Beth Larson! They did an amazing job leading the event to celebrate this year's honorees and their accomplishments!



2023 HONOREES





OUTSTANDING BUSINESS

Paul Davis Restoration

Nominated by: University Wisconsin Foundation



OUTSTANDING YOUTH IN PHILANTHROPY

Christian Huber

Nominated by: Wayforward Resources



OUTSTANDING PHILANTHROPIC FOUNDATION

Roots & Wings Foundation

Nominated by: Wayforward Resources



LIFETIME ACHIEVEMENT

John Ralston

Nominated by: Church Health Services



OUTSTANDING INDIVIDUAL PHILANTHROPIST

Andy and Jenny Czerkas

Nominated by: Extended Hands Pantry



LIFETIME ACHIEVEMENT

Pete Lundberg

Nominated by: Aldo Leopold Nature Center



OUTSTANDING VOLUNTEER FUNDRAISER

John Sims

Nominated by: UnityPoint Health – Meriter Foundation & Madison Children's Museum



OUTSTANDING FUNDRAISING PROFESSIONAL

Jenny Pressman

Nominated by: AFP Greater Madison Board



to our 2023 sponsors

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PROGRAM SPONSORS

















FUNDRAISING DAY WISCONSIN

- FDW was held on June 13, 2023!
- Special thank you to American Family Insurance and American Family Dreams Foundation for hosting us at their headquarters in Madison. This greatly reduced the cost of the event.
- Full day filled with sessions brought to us by speakers and trainers from around the country.
- Attendees came from throughout Wisconsin.
- AFP GM shared a portion of registration with Wisconsin chapters.



Have an idea for an inspiration speaker or trainer for 2024? Let us know, admin@afpmadison.org.



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.

THANKYOU

FROM THE AFP MADISON CHAPTER

AFP Greater Madison Chapter P.O. Box 45046 Madison, WI 53744 www.afpmadison.org (608) 421-3597

