



AFP MADISON CHAPTER

2020 ANNUAL REPORT

DECEMBER 15, 2020



2020 BOARD LEADERSHIP

President: Janie Winston

President Elect: Sarah Linn

Immediate Past President: Jen Davie, CFRE

Secretary: Halley Pucker

Treasurer: Caitlin Behncke

Communications Co-chair: Marissa DeGroot

Communications Co-chair: Jen Davie, CFRE

Diversity, Equity & Inclusion Chair: Julia O'Donnell

Fundraising Day WI Chair: Mary Donahue

Membership Co-chair: Tracy Phillippi

Membership Co-chair: Jacob Immel

National Philanthropy Day Co-chair: Arlen Moss

National Philanthropy Day Co-chair: Halley Pucker

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: Anna January

Young Professionals/Youth in Philanthropy Co-chair: Ash Collins



2021 BOARD OF DIRECTORS NOMINEES

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: Aimee Furie

Membership & Engagement Chair: Ash Collins

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



CAMPAIGN HONOR ROLL

Caitlin Behncke

Seth Braddock

Ash Collins

Jen Davie, CFRE

Marissa DeGroot

Mary E Donahue

David Garvoille

Heidi Habeger

Kirsten Houghton, CPA

Judith Keel, MBA

Sarah Linn

David Mossner, CFRE

Julia Odonnell

Ms. Casey Oelkers

Mindy Petersen

Aleeh Schwoerer

Kristi Shepard

Lori Werbeckes, CFRE

Janie Winston



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.



MEMBERSHIP HIGHLIGHTS

Our Membership Committee supported Chapter members and friends alike, through a tumultuous year by:

- Waiving many member and non-member program fees and giving away 6 free memberships
- Hosting a successful, 100% virtual, annual membership appreciation event – a big thank you to our friends at Delta Beer Lab for the event prizes
- Continuing to help Greater Madison's fundraising community with questions and communications between Chapter members and AFP International



YOUNG PROFESSIONALS HIGHLIGHT

The current Young Professionals Committee Chairs congratulate the **eight Young Professional Committee members** who have been nominated for the 2021 Board of Directors slate.



SCHOLARSHIP HIGHLIGHTS

- Despite the challenges of 2020, our Chapter was able to help three members renew their CFRE credentials
- Through the Frank Emerging Leaders scholarship, our Chapter also empowered our members to further their professional development through virtual education programs
- Our 2020 ICON scholars deferred their awards because of the pandemic and will attend the 2021 conference



PROFESSIONAL DEVELOPMENT HIGHLIGHTS

- The Professional Development Committee was unable to hold its CFRE Refresher Course as planned due to COVID-19. However members of this resourceful group responded to the virus with virtual Zoom-tables.
- Members responded well to the virtual opportunities to share, teach, and learn with others several times during the last three quarters of 2020. The annual Grants Workshop was held, but also became a virtual event thanks to the gracious efforts of the U.W. Memorial Library.
- The Chapter Mentoring program stayed on track with its program, nimbly changing course to bring mentors and mentees together via technology.



COMMUNICATIONS HIGHLIGHT

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

- More original articles written by AFP and committee members
- An average open rate of 27.6%, which is **higher than the average nonprofit email open rate** according to Mailchimp and Campaign Monitor in 2019 and 2020.



Racial Justice Learning Resources

Racial Justice Learning Resources in Madison

As a white woman striving to learn and practice anti-racism, I appreciate that there are times we must do the self-work, as well as times we must do the work in community. In doing so, I am grateful for the opportunity to connect with community members and organizations working to dismantle white supremacy. Among many fantastic local organizations, YWCA Madison offers a number of racial justice trainings, conversations, and suggested resources.

-Victoria Boucher, Campaign Director of Community Shares of Wisconsin, Member of AFP Greater Madison's Diversity, Equity & Inclusion Committee

DIVERSITY, EQUITY AND INCLUSION HIGHLIGHTS

- The committee helped create and establish two new awards for Philanthropy Day Awards. These included Outstanding Achievement in JEDI and Outstanding Grass Roots Fundraiser.
- The chapter also achieved the IDEA Champion designation again this year.
- The committee has also planned a great program for January 2021 with Debbie Biddle presenting on Assessing Organizational Racism and Advocating for Anti-Racist Workplaces.



EDUCATIONAL SERIES HIGHLIGHTS

- While 2020 did not unfold as our committee had envisioned, we're pleased with how everyone pivoted to ensure that sessions continued to serve the fundraising professionals in our membership and the greater community.
- We were able to offer two in-person programs and then pivot to present three more virtual programs! Additionally, the AFP Board hosted a Q&A on proposed chapter structure changes. We are grateful for the sponsorship support of four programs in 2020.
- Thanks to DEI Committee for continuing our collaborative efforts by coordinating a session in January 2021.



2020 MONTHLY MEETING SPONSORS

- Alliant Energy Foundation
- McDonald Schaefer
- The QTI Group
- United Way of Dane County Foundation



A special thanks to our monthly meeting sponsors!

FUNDRAISING DAY WISCONSIN

- FDW was unable to be held in-person this year, but we welcomed Otto Reinisch for a conversation on Reclaiming the Relational Work of Fundraising in a Digital Age
- 244 people registered for the program held on August 18th
- We hope to offer a full conference in 2021 whether in-person or virtually!



An AFP Milwaukee/Madison Partnership

NATIONAL PHILANTHROPY DAY

- We were proud to announce the addition of two new award categories, created in cooperation with the Diversity, Equity and Inclusion Committee
- Two new hosts, Sagashus Levingston and Patrick Farabaugh, helped us create a joy-filled event to celebrate our award winners
- We had almost 200 people tune in live on Friday, November 13 for the virtual celebration!
- We have almost 500 views on YouTube



2020 NATIONAL PHILANTHROPY DAY AWARD WINNERS

Outstanding Youth in Philanthropy - Peyton Barber (Nominated by Girl Scouts of Wisconsin - Badgerland)

Outstanding Achievement in JEDI - April Kigeya (Nominated by Marci Kunene)

Outstanding Business - First Business Bank (Nominated by United Way of Dane County)

Outstanding Fundraising Professional - Paul Harrison (Nominated by Access Community Health Centers)

Outstanding Grass Roots Fundraiser - Mary and Rob Gooze (Nominated by Wisconsin Foundation & Alumni Association)

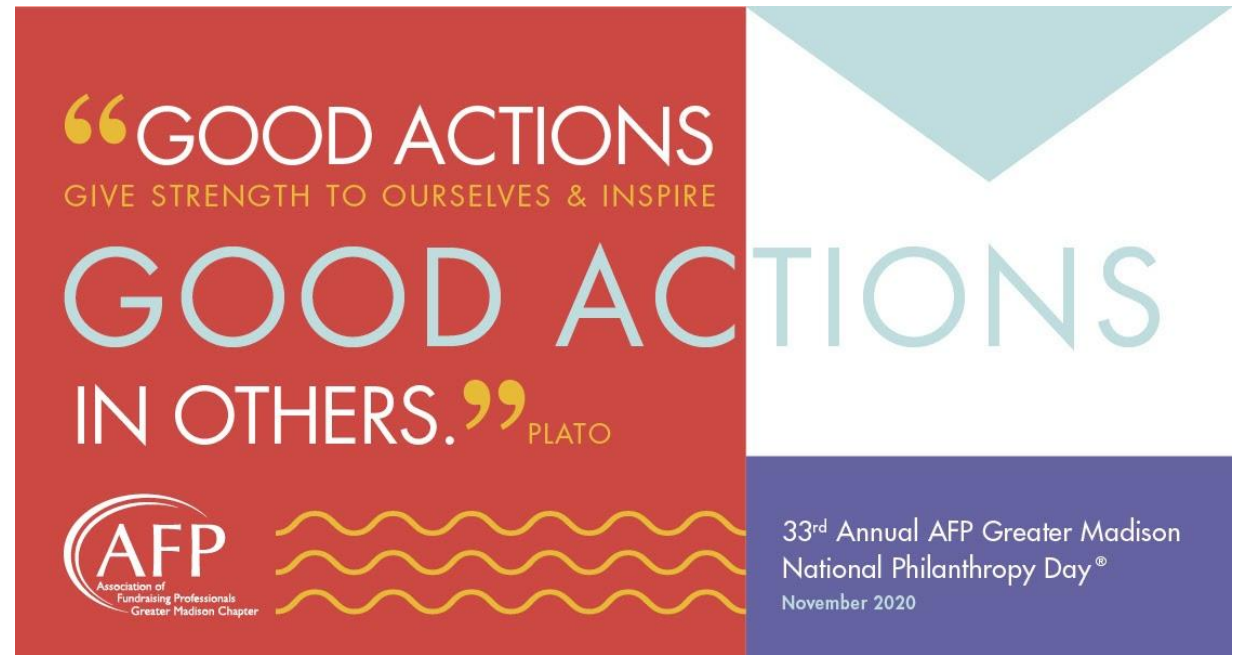
Outstanding Individual Philanthropist - Jun W and Sandra M. Lee (Nominated by Wisconsin Foundation & Alumni Association and Wisconsin Chamber Orchestra)

Outstanding Philanthropic Organization - The Levy Giving Fund (Nominated by Quiet Santa, UW Health American Family Children's Hospital, Gilda's Club, Heartland Farm Sanctuary and Madison Children's Museum)

2020 NATIONAL PHILANTHROPY DAY SPONSORS

- Wisconsin Foundation & Alumni Association
- First Business
- Madison Community Foundation
- Alliant Energy Foundation
- SVA Certified Public Accountants
- United Way of Dane County Foundation & United Way of Dane County
- American Printing
- Oak Bank

A special thanks to our NPD 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.



2020 BUDGET

Revenue:

	Approved Budget 2020	Actual as of 12/7/2020	Percentage Variance
Philanthropy Day sponsorships	44,250.00	670.00	-98.5%
Philanthropy Day registration	15,000.00	0.00	-100.0%
Philanthropy Day in-kind	26,400.00	1,000.00	-96.2%
Monthly chapter program meetings	11,000.00	4,559.00	-58.6%
Monthly chapter program sponsor	3,600.00	650.00	-81.9%
Fundraising Day Wisconsin	67,000.00	0.00	-100.0%
Professional Development	600.00	20.00	-96.7%
Young Professionals	300.00	0.00	-100.0%
Job Board	5,900.00	3,975.00	-32.6%
CFRE Review Course	3,600.00	0.00	-100.0%
AFP member rebate	8,500.00	7,065.00	-16.9%
Be the Cause rebate	220.00	0.00	-100.0%
Interest	890.00	386.35	-56.6%
Total revenue	187,260.00	19,475.35	-89.6%

Expenses:

Philanthropy Day	24,700.00	5,552.71	-77.5%
Philanthropy Day in-kind	26,400.00	1,000.00	-96.2%
Programs	12,600.00	1,358.85	-89.2%
Fundraising Day Wisconsin	59,800.00	2,533.87	-95.8%
Professional Development	600.00	0.00	-100.0%
Communications	6,800.00	2,603.00	-61.7%
Scholarships	14,560.00	4,360.40	-70.1%
Membership	1,250.00	100.00	-92.0%
Diversity	100.00	0.00	-100.0%
Young Professionals	700.00	0.00	-100.0%
CFRE Review Course	3,120.00	0.00	-100.0%
Administration	36,630.00	10,360.89	-71.7.0%
Total expenses	187,260.00	27,869.72	-85.1%

Net income

0

(8,394.37)



2021 PROPOSED BUDGET

Revenue:

Philanthropy Day sponsorships	20,750.00
Philanthropy Day registration	5,000.00
Philanthropy Day in-kind	0.00
Monthly chapter program meetings	1,500.00
Monthly chapter program sponsor	2,700.00
Fundraising Day Wisconsin	18,000.00
Professional Development	300.00
Young Professionals	00.00
CFRE review course	0.00
Job Board	4,400.00
AFP member rebate	7,650.00
Be the Cause rebate	0.00
Interest	463.00
Total revenue	60,763.00

Expenses:

Philanthropy Day	1,969.00
Philanthropy Day in-kind	0.00
Programs	2,150.00
Fundraising Day Wisconsin	13,700.00
Professional Development	0.00
Communications	3,050.00
Scholarships	10,300.00
Membership	250.00
Diversity	0.00
Young Professionals	0.00
CFRE review course	0.00
Administration	29,344.00
Total expenses	60,763.00
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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