

**Association of Fundraising Professionals
Greater Madison Chapter
2014 Slate of Officers**

Kirsten Houghton, CPA, MBA – President

Nicole Hoffmann - President Elect

Dan Plummer, D. Mus. A. – Immediate Past President

Lori Werbeckes, CFRE - Secretary

Terrie Goren, CFRE - Treasurer

Cheryl Porior-Mayhew - Communications Co-Chair

Meghan Gauger - Communications Co-Chair

Paul Harrison - Diversity Chair

Adam Erdmann - Membership Co-Chair

Annie Thym - Membership Co-Chair

Dan Plummer - National Philanthropy Day Co-Chair

Michele Traband - National Philanthropy Day Co-Chair

Amy Overby - Professional Development Co-Chair

Jen Davie - Professional Development Co-Chair

Julie Bauer – Program Co-Chair

Jennifer Jeffress Collins – Program Co-Chair

Judy Brannstrom - Scholarship Chair

Sarah Linn – Young Professionals/Youth in Philanthropy Chair



2013 Annual Report

**AFP Greater Madison Chapter
Annual Meeting
December 17, 2013**

2013 Highlights

- The 2013-2015 three-year chapter Action Plan was developed and implemented by the AFP Greater Madison Chapter Board.
- Hosted 10 chapter meetings with educational presentations with an average of 60 people in attendance per meeting. 230 guests joined us over the year for these meetings.
- Facilitated four Networking Breakfasts in two locations, east and west, with up to 20 attendees per location.
- Held five webinars on a variety of timely topics.
- Net increase of membership by 13% to 171 members. We have 54 new members and a retention rate of 67%.
- Attained Ten Star Status from AFP International for the eighth year in a row.
- Distributed \$3,570 in scholarships to 9 members for professional development.
- Posted 128 advertisements to the Jobs Board to provide service to the field for career advancement.
- Began a free workshop series targeted toward small non-profits.
- Offered 2-day Fundamentals in Fundraising course for 12 members. Young professional and new members accounted for the majority of attendees.
- Increased Philanthropy Day sponsorship by 11% from 2012 raising an additional \$2,450, and hosted 426 guests in a sold out event at the Overture Center.

Every Member Campaign Honor Roll

The following chapter members helped us exceed our 2013 EMC goal by 22%. Based on these gifts, the grant back to our chapter in 2013 will grow and benefit our membership even more!

Leah-Nell Adams
David E. Allen
Darlene Arneson
Julie Bauer
Judith Brannstrom
Cheri Dubiel Buckner
Jennifer Jeffress Collins
Tara Valentine Darnell
Jen Davie
Sara DeTienne
Adam Erdmann
Ashley Fletcher
Amy J Good
Terrie Goren, CFRE
Lori Greenberg
Peggy Halloran
Paul D. Harrison
Nicole Hoffmann
Kirsten Houghton, CPA, MBA
Cedric Johnson
Brittany Lee
Daun Maier, CFRE
Katy Menges, BS
Bruce Moffat
Herbert F Orton, MS
Amy Overby
Jill W. Pfeiffer
Dan Plummer, PHD
Cheryl Jean Porior-Mayhew
Anna Reynolds
Kristi Shepard
Martha A. Taylor
Lizabeth Tolles
Keith E. VanLanduyt
Lori Werbeckes, CFRE
Shahla Miriam Werner, PHD
Chris Ziemba

2013 Chapter Leadership

Officers

President	Dan Plummer, PhD
President Elect	Kirsten Houghton, CPA, MBA
Secretary	Lori Werbeckes, CFRE
Treasurer	Terrie Goren
Immediate Past President	Jennifer Jeffress Collins

Committee Chairs

Communications Co-Chair	Cheryl Porior-Mayhew
Communications Co-Chair	Keith Van Landuyt
Program Chair	Nicole Hoffmann
Diversity Chair	Paul Harrison
Scholarship Chair	Judy Brannstrom
Membership Chair	Adam Erdmann
Membership Co-Chair	Anna Reynolds
Nat'l Philanthropy Day Co-Chair	Julie Bauer
Nat'l Philanthropy Day Co-Chair	Peggy Halloran
Professional Development	Amy Overby

Erin L. Richardson, Chapter Administrator

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.

AFP Greater Madison Chapter

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Thank you!

2013-2015 Action Plan Highlights

Goal I: Further the development and education of professionals.

- Objective 1: Provide quality and relevant monthly programs and webinars.
- Objective 2: Promote and facilitate sharing of knowledge among members at various levels.
- Objective 3: Provide the opportunity for chapter members to gain overall fundraising knowledge and the opportunity to earn CFRE credential.
- Objective 4: Co-host Conference/Workshop with Regional Colleagues.
- Objective 5: Ensure membership is aware of educational opportunities and pertinent research.

Goal II: Educate the public and raise awareness for our profession and our work.

- Objective 1: Increase awareness of our work in the community and media.
- Objective 2: National Philanthropy Day - increase media involvement and awareness of philanthropy. Consider ways that NPD could be used as a time for collective action.

Goal III: Deliver on member benefits.

- Objective 1: Membership will be informed of benefits available.
- Objective 2: Members will be aware of scholarship funding available for programs and professional development.

Goal IV: Build an inclusive AFP Madison Chapter membership that represents the diversity of the practitioners in our community.

- Objective 1: Represent and communicate the work of the AFP Madison Chapter's diverse practitioners and the work of organizations that serve diverse communities.
- Objective 2: Programming will be inclusive in order to serve our community.
- Objective 3: Chapter will work toward and apply for the Friends of Diversity Designation through IHQ.

Goal V: Prepare for the future by engaging young professionals and young people who are interested in philanthropy.

- Objective 1: Create awareness of philanthropy in next generation.
- Objective 2: Support, involve and collaborate with UW Collegiate Chapter.
- Objective 3: Educate young professionals new to the field.

Goal VI: Ensure a successful future for the AFP Greater Madison Chapter.

- Objective 1: Identify the opportunities (volunteer roles) for members to develop their skills as volunteer leaders.
- Objective 2: & 3: Grow membership & increase financial resources.

AFP - Greater Madison Chapter
2013 Budget to Actual Results

	Budget 2013	Actual as of 11/30/2013	Percentage Variance
Revenue:			
Philanthropy day sponsorships	16,000	22,750	142.2%
Philanthropy day registration	14,300	11,915	83.3%
Philanthropy day in-kind	8,125	7,360	90.6%
Monthly chapter program mtgs	11,550	11,484	99.4%
Monthly chapter program sponsor	1,800	2,700	150.0%
Webconferences	600	1,532	255.3%
Fundamentals of Fundraising	2,500	5,375	215.0%
Seminars/workshops/sponsorship	3,000	-	0.0%
Seminars/workshops in-kind	1,000	-	0.0%
Job board	3,000	5,720	190.6%
AFP member rebate	4,800	5,225	108.8%
EMC rebate/grant	275	236	85.8%
Networking breakfast	600	1,150	191.6%
Nakoma CC in-kind	3,400	-	0.0%
Other income	564	-	0.0%
Total income	71,514	75,447	105.5%
Expenses:			
Philanthropy day	21,900	22,096	100.9%
Philanthropy day in-kind	8,125	7,360	90.6%
Programs	13,784	9,046	65.6%
Fundamentals in Fundraising	2,500	3,674	147.0%
Seminars/workshops	3,000	-	0.0%
Communications	100	-	0.0%
Scholarships	2,500	1,290	51.6%
Membership	690	138	20.0%
Diversity	550	-	0.0%
Administration	16,627	19,585	117.8%
Total expenses	69,776	63,189	90.6%
Net income / (loss)	\$ 1,738	\$ 12,258	

A Special Thank You to the 2013 Sponsors

Monthly Meeting Sponsors

Badger Group	Nakoma Golf Club
M3 Insurance	SVA Certified Public Accountants, S.C
Madison Community Foundation	The Employer Group
Madison Magazine	The Results Group of Wisconsin, LLC
McDonald Schaefer Group	

National Philanthropy Day Sponsors

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