



## **2011 Annual Report**

**AFP Greater Madison Chapter  
Annual Meeting  
December 20, 2011**

## 2011 Highlights

- Increased membership by 16% from 128 members to 148 members; increased member retention rate from 70% in January to 77% in November
- Attained 10 Star Status
- Distributed \$2000 in scholarships to members for professional development.
- Implemented new Jobs Board to provide outlet for career opportunities; generated \$2500 in revenue
- Improved chapter luncheons with a new venue and better food and service
- Offered a well-attended one-day workshop on "Making Planned Giving Work for Your Organization"
- Reestablished Professional Development initiative with a Networking Breakfast and the recruitment of a new committee chair.
- Increased communication with members on Facebook and Linked-In
- Hired and worked with a new Chapter Administrator
- Increased chapter revenue by \$6700 leaving us with a surplus to allow us to create a chapter reserve fund
- Increased Philanthropy Day sponsorships by \$4500 over 2010
- Continued working with the UW-Madison Center for Nonprofits to develop a collegiate chapter—the group organized their first community partnership with Goodman Community Center
- Continued working with Diversity Partner, Freedom Inc., to participate in our pilot program in 2010, aimed at strengthening the fundraising capacity of emerging non-profit organizations

### **2011 Membership by the Numbers...**

**New members - 49**

**Renewed members - 91**

**Total members – 148**

## 2010 Chapter Leadership

### Officers

President	Cheri Dubiel Buckner
President Elect	Jennifer J. Collins
Secretary	Lori Werbeckes, CFRE
Treasurer	Kirsten Houghton, CPA, MBA
Past President	Judy Keel, MBA

### Committee Chairs

Communications	Patricia Eldred, CFRE
Diversity	Ed Lee
Membership	Emily Gruenewald and Sara DeKok, CFRE
National Philanthropy Day Program	Daniel Plummer, PhD
Scholarship	Nicole Hoffmann Peggy Halloran

Sarah Smogoleski, 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.

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## 2011 Action Plan Highlights

### **Goal I: Increase resources for the chapter.**

- Objective 1: Increase the impact of Philanthropy Day for the chapter and community
- Objective 2: Continue chapter-wide ongoing sponsorship program.
- Objective 3: Explore opportunities for sponsorships from Philanthropy Day award recipients
- Objective 4: Explore opportunities for sponsorships from Philanthropy Day award recipients.
- Objective 5: Explore the development of a cash reserve fund.

### **Goal II: Provide quality, professional activities to increase and enhance career knowledge, advancement and outreach.**

- Objective 1: Program Committee provides quality and relevant monthly programs and webconferences.
- Objective 2: Provide the opportunity for chapter members to gain overall fundraising knowledge and the opportunity to earn CFRE credential.
- Objective 3: Provide a one-day workshop on a relevant topic every spring.
- Objective 4: Investigate feasibility of a formal mentoring program.

### **Goal III: Every member is fully informed about chapter activities and benefits.**

- Objective 1: Develop a website plan that guides content and create a strategy for maintenance.
- Objective 2: Send out member e-newsletter ten times per year.
- Objective 3: Continue job board on website
- Objective 4: Develop stronger presence on social media web sites

### **Goal IV: Our chapter is positioned as a leader for ethical fundraising in our community.**

- Objective 1: Provide legislative updates on philanthropy issues to membership as needed in concert with media outreach.
- Objective 2: Provide annual fundraising ethics education opportunity.

### **Goal V: Strengthen chapter membership through engagement, communication and volunteerism.**

- Objective 1: Create a dynamic plan for balancing paid staff with volunteer support to the chapter.
- Objective 2: Increase participation in chapter activities.
- Objective 3: Effectively communicate benefits to membership.

AFP - Greater Madison Chapter

2010 Budget to Actual Results

	Budget 2010	Actual as of 12/15/2010	Percentage Variance
Revenue:			
Philanthropy day sponsorships	12,000	14,050	117%
Philanthropy day registration	13,800	14,100	102%
Philanthropy day in-kind	10,045	10,045	100%
Monthly chapter program mtgs	7,500	7,461	99%
Monthly chapter program sponsor	2,700	1,500	56%
Webconferences	1,500	1,433	96%
CFRE survey course	2,500	2,840	114%
Seminars/workshops	2,000	3,220	161%
Seminars/workshops in-kind	-	2,000	0%
Essentials of Fundraising	2,500	-	0%
AFP member rebate	4,000	3,995	100%
EMC rebate/grant	275	281	102%
Advertising	500	-	0%
Mail list rental	150	-	0%
Other income	-	175	0%
<b>Total income</b>	<b>59,470</b>	<b>61,100</b>	<b>103%</b>
Expenses:			
Philanthropy day	21,215	17,566	83%
Philanthropy day in-kind	10,045	10,045	100%
Programs	8,395	5,813	69%
CFRE survey course	1,500	2,452	163%
Seminars/workshops	1,700	1,766	104%
Seminars/workshops in-kind	-	2,000	0%
Essentials of Fundraising	1,500	-	0%
Communications	1,100	806	73%
Scholarships	2,000	1,325	66%
Membership	1,800	1,262	70%
Diversity	750	-	0%
Administration	9,240	9,204	100%
<b>Total expenses</b>	<b>59,245</b>	<b>52,239</b>	<b>88%</b>
<b>Net income / (loss)</b>	<b>\$ 225</b>	<b>\$ 8,861</b>	

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