

**Association of Fundraising Professionals
Greater Madison Chapter
2017 Slate of Officers**

Jen Davie, CFRE — President

Janie Winston — President Elect

Adam Erdmann — Immediate Past President

OPEN — Secretary

Lynn Heslinga — Treasurer

Adam Erdmann — Communications Co-Chair

OPEN — Communications Co-Chair

Paul Harrison — Diversity Chair

Dan Plummer D. Mus. A— Fundraising Day WI Co-Chair

Michele Traband — Fundraising Day WI Co-Chair

Mary Donahue — Membership Co-Chair

Sarah Linn — Membership Co-Chair

Saira Frank — National Philanthropy Day Co-Chair

Annie Thym — National Philanthropy Day Co-Chair

Lori Werbeckes, CFRE — Professional Development Chair

Nicole Hoffmann — Program Co-Chair

Janie Winston — Program Co-Chair

Courtney Polster, Ph.D., CFRE — Scholarship Chair

Pete Schwieger – Young Professionals/Youth in Philanthropy Chair



2016 Annual Report

**AFP Greater Madison Chapter
Annual Meeting
December 13, 2016**

2016 Highlights

- Provided 13 scholarships to our members for a variety of educational conferences and workshops critical to professional development.
- Retained our statuses as a Ten Star Gold and Friends of Diversity Chapter.
- Hosted Fundamentals of Fundraising and the CFRE Review Course with a total of 20 participants from a variety of AFP chapters; Two chapter members became CFREs shortly after taking the class.
- Reached a new membership record of 191 professionals, welcomed 46 new members and 71% of membership chose to renew.
- Diversity Committee offered free workshops for small, grassroots non-profit organizations and worked to support equity-based organizations with a three-year discounted membership program.
- Hosted two networking events for Young Professionals and provided mentoring connections to 12 AFP members
- Increased National Philanthropy Day sponsorship by 17% from 2015, had a record high of 24 award nominees and sold out with 436 guests in attendance.
- Based on AFP survey results, strong programs ranging from signature events, to up and coming donors, long careers in fundraising, donor advised funds, and a broad range of other topics; Hosted nine chapter meetings with an average of 64 people in attendance.
- A new membership brochure was crafted, edited and published with the help of American Printing Company.
- Posted 112 advertisements to the Job Board to connect professionals with opportunities for career advancement.
- Fundraising Day Wisconsin hosted 228 participants; In partnership with AFP Southeastern WI, the one-day conference welcomed nationally-acclaimed presenters Gail Perry, Rebecca Fishman Lipsey, Chuck Loring, and Rachel Muir.

Thank you!

Be the Cause Campaign Honor Roll

The following chapter members helped us exceed our 2016 Be The Cause goal by 14%. Based on these gifts, the grant back to our chapter in 2017 will grow and benefit our membership even more!

David E. Allen	Katie Knill
Connie Beam	Howard Landsman
Judith Brannstrom	Sarah Linn
Jennie Casavant	Daun Maier, CFRE
Jennifer Jeffress Collins	Renee Moe
Jen Davie, CFRE	David Mossner, CFRE
Mary E. Donahue	Casey Oelkers
Patricia L. Eldred, CFRE	Daniel Plummer, D. Mus. A
Adam Erdmann	Courtney Polster, Ph.D., CFRE
Saira Frank	Erin Richardson
Terrie Goren, CFRE	Kristi Shepard
Paul D. Harrison	Annie Thym
Marcy Heim, CFRE	Clint Walz
Nicole Hoffmann	Lori Werbeckes, CFRE
Kirsten Houghton, CPA	Janie Winston
Amy Kerwin	Chris Ziemba
Gary Klein	

BE  CAUSE
Empower. Strengthen. Transform.

A Special Thank You to the 2016 Sponsors

Monthly Meeting, Fundraising Day Wisconsin & National Philanthropy Day Sponsors

Agrace Hospice	National Guardian Life Insurance Company
Alliant Energy Foundation	Natural Resources Foundation
American Girl	Nonprofit Center of Milwaukee
American Printing Company	Numbers 4 Nonprofits
Anonymous	Oak Bank
Associated Bank	Overture Center for the Arts
Attic Angel Association	RCB Donor Recognition
Bid Pal	Spano Pratt
Bloomerang	SSM Health St. Mary's Foundation-Madison
Community Shares of Wisconsin	Summit Credit Union
CUNA Mutual Foundation	SVA Certified Public Accountants, S.C
Event Essentials	The Badger Group
First Business Trust & Investments	The Employer Group
Flad Development & Investment Corp.	The QTI Group
Flower Studio	The Results Group
Full Compass	Timpano Consulting
Greater Giving	Town Bank
Greater Milwaukee Foundation	United Way of Dane County
Ideal Printing & Graphics	United Way of Dane County Foundation
InBusiness	University of Wisconsin Foundation
J.H. Findorff & Son, Inc.	US Bank
Johnson Bank	UW Carbone Cancer Center
Kelly Family Foundation	UW Health & Unity Health Insurance
Little Green Pencil	UWM Helen Bader Institute for Nonprofit Management
M3 Insurance	UW Parkside
Madison Community Foundation	Webrcrafters, Inc.
Madison Concourse Hotel & Governor's Club	Wegner CPAs
McDonald Schaefer	Wipfli LLP
Melissa Grace Photography	WISC-TV
MGE Foundation, Inc.	Wisconsin Planned Giving Council
Midwest Family Broadcasting	WPS Health Solutions

AFP - Greater Madison Chapter

2016 Budget to Actual Results

	Budget 2016	Actual as of 11/30/2016	Percentage Variance
Revenue:			
Philanthropy Day sponsorships	25,000	44,000	176%
Philanthropy Day registration	15,000	12,375	83%
Philanthropy Day in-kind	12,220	6,198	51%
Monthly chapter program mtgs	10,000	9,042	90%
Monthly chapter program sponsor	2,400	2,700	113%
Webconferences	2,000	180	9%
Fundraising Day Wisconsin	33,000	44,160	134%
Professional Development	1,050	680	65%
Young Professionals	100	95	95%
CFRE/Fundamentals in Fundraising	11,700	8,400	72%
Job board	6,500	4,975	77%
AFP member rebate	7,000	6,510	93%
BE the CAUSE rebate	650	520	80%
Interest	150	255	170%
Nakoma CC in-kind	5,600	5,600	0%
AFP Chapter Incentive Program	150	-	0%
Total income	132,500	145,690	110%
Expenses:			
Philanthropy Day	19,750	22,570	114%
Philanthropy Day in-kind	12,200	6,198	51%
Programs	11,800	10,812	92%
Fundraising Day Wisconsin	34,175	40,122	117%
Professional Development	920	80	9%
Nakoma CC In-Kind	5,600	5,600	0%
CFRE/Fundamentals in Fundraising	11,050	8,102	73%
Communications	550	9	2%
Scholarships	5,000	4,745	95%
Membership	1,050	955	91%
Diversity	2,075	300	14%
Young Professionals	300	281	94%
Administration	28,025	25,996	93%
Total expenses	132,495	125,767	95%
Net income /(loss)	\$ 5	\$ 19,922	

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Philanthropy Day®**



2016 Chapter Leadership

Officers

President	Adam Erdmann
President Elect	Jen Davie, CFRE
Secretary	Lori Werbeckes, CFRE
Treasurer	Kirsten Houghton, CPA, MBA
Immediate Past President	Nicole Hoffmann

Committee Chairs

Communications Co-Chair	Katie Knill
Communications Co-Chair	Clint Walz
Diversity Chair	Paul Harrison
Fundraising Day WI Co-Chair	Jennifer Jeffress Collins
Fundraising Day WI Co-Chair	Dan Plummer, D. Mus. A
Membership Co-Chair	Jennie Casavant
Membership Co-Chair	Mary Donahue
Nat'l Philanthropy Day Co-Chair	Saira Frank
Nat'l Philanthropy Day Co-Chair	Annie Thym
Professional Development Co-Chair	Jen Davies, CFRE
Professional Development Co-Chair	Lori Werbeckes, CFRE
Program Chair	Janie Winston
Scholarship Chair	Courtney Polster, Ph.D., CFRE
Young Professionals/ Youth in Philanthropy Chair	Sarah Linn

Chapter Administrator, Erin L. Richardson

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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Madison, WI 53744-5046

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608-224-9092

2016-2018 Action Plan Highlights

Goal I: AFP Greater Madison provides and enhances opportunities for professional development education and assists members to maximize the benefits provided by AFP Int'l to help fundraising professionals succeed at every stage of their careers.

Goal II: AFP Greater Madison is a thriving and growing, inclusive community of fundraising professionals and community members that represents the diversity of our community and the needs served by our work.

Goal III: AFP Greater Madison advocates for and promotes the value of our profession and the culture of philanthropy in our community.

Goal IV: AFP Greater Madison is effectively governed, soundly funded and efficiently managed consistent with best nonprofit practices.



WI, Greater Madison Chapter



FRIENDS OF DIVERSITY
ASSOCIATION OF FUNDRAISING PROFESSIONALS 2015