



AFP MADISON CHAPTER 2019 ANNUAL REPORT

DECEMBER 17, 2019



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President: Janie Winston

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Fundraising Day WI Chair: Mary Donahue

Membership Co-chair: Tracy Phillippi

Membership Co-chair: Sarah Linn

National Philanthropy Day Co-chair: Dan Plummer

National Philanthropy Day Co-chair: Michele Traband

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: Pete Schwieger

Young Professionals/Youth in Philanthropy Co-chair: Anna January



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Communications Co-chair: Jen Davie

Communications Co-chair: Marissa DeGroot

Diversity, Equity & Inclusion Chair: Julia O'Donnell

Fundraising Day Wisconsin Chair: Mary Donahue

Membership Co-chair: Jake Immel

Membership Co-chair: Tracy Phillippi

National Philanthropy Day Co-Chair: Halley Pucker

National Philanthropy Day Co-Chair: Arlen Moss

Professional Development Co-chair: Mindy Petersen, CFRE

Professional Development Co-chair: David Mossner, CFRE

Educational Series Co-chair: Julie Ehrke

Educational Series Co-chair: Kristi Shepard

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

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

Young Professionals/Youth in Philanthropy Co-chair: Anna January



CAMPAIGN HONOR ROLL

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BE  CAUSE

Empower. Strengthen. Transform.

Thank you to all of the donors who have already contributed to the AFP Foundation's Be the Cause campaign in 2019.

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



MEMBERSHIP HIGHLIGHT

Our Membership Committee hosted our annual AFP After Work at Giant Jones Brewery, bringing together more than **75 development professionals** for an evening of networking, socializing, and raffle prizes!



YOUNG PROFESSIONALS HIGHLIGHTS

- AFP Greater Madison Young Professionals hosted two events focused on work life balance and a trivia event celebrating 5+ years of work from the Young Professionals Committee
- AFP Greater Madison honored the UW Pre-Veterinary Association as **Outstanding Youth in Philanthropy** (Nominated by Dane County Humane Society) during the 2019 National Philanthropy Day Celebration
- AFP Greater Madison YP Committee began developing a mentorship program to serve young professionals and those new to fundraising as a career, helping them connect and develop relationships with experienced chapter members



SCHOLARSHIP HIGHLIGHTS

- In 2019, the scholarship committee was honored to award **15 scholarships** to our members!
- Members of the 2019 scholarship committee are: Brandi Funk, Assoc. Director of Development at UW Foundation, College of Agriculture and Life Sciences; Lisa Gundlach, Major Gifts Officer at Second Harvest; Quinn Heneghan, Operations Manager at Urban Assets, Courtney Polster, Development Manager at Agrace HospiceCare and Mike Sweitzer Beckman, Major Gifts Officer at Edgewood College.



PROFESSIONAL DEVELOPMENT HIGHLIGHTS

- **Quarterly Roundtables** that brought fundraising peers together to compare notes, share ideas, and receive feedback on topics including *What Keeps You Up at Night*, *Donor Advised Funds*, *Cultivation Events*, and *Year-end-rush Plans and Concerns*.
- The annual **Grants Workshop** in August provided a free, two-hour workshop to AFP members interested in learning about a valuable collection of grant-seeking resources available in Madison. Content was suitable for development staff of all levels.
- In October, **professional headshots** (plus coffee and donuts!) were made free to all AFP members who donated blood through the American Red Cross!
- And finally, in November, a **free webinar** was provided to all AFP Members. The webinar, *Financial Literacy: What Every Fundraising Professional Needs to Know*, explained financial planning and cash management; financial statements and reporting; requirements of local, state, and federal governments; and the role of the Board of Directors and staff.



COMMUNICATIONS HIGHLIGHT

The monthly e-newsletter shared original AFP Greater Madison content as well as features from AFP Global with members with an average open rate of 30.33%, between 5.16% - 9.94% **higher than the average nonprofit email open rate** according to Mailchimp and Campaign Monitor.



Celebrating Community Champions at the 2019 National Philanthropy Day Awards Luncheon

On November 8th we honored the winners of the 2019 National Philanthropy Day Awards. These individuals, businesses and organizations have shown commitment and passion to strengthening our community and making it a better place to live for everyone. Take a look at the full list of winners and event photos.

[READ MORE...](#)



Honoring a Founding Member

We celebrate Boris Frank's longstanding fundraising career, along with his dedication to mentoring new generations in our profession. As an original member of our chapter, scholarships for emerging fundraisers are named in his honor.



Are you informed on Informed Delivery?

Preparing for your year-end appeal? Informed Delivery is a perfect way to simultaneously enter your mail piece in the digital world and the physical world. And did we mention it is free?!

DIVERSITY, EQUITY AND INCLUSION HIGHLIGHTS

- Retained our **IDEA Champion** (formerly Friends of Diversity) Designation.
- Held a successful and sold out October program on Intersectionality.
- Gained 1 new committee member.
- Changed our name from the Diversity Committee to the **Diversity, Equity and Inclusion Committee**



EDUCATIONAL SERIES HIGHLIGHTS

- Thanks you for your feedback and program recommendations as our committee presented engaging and useful topics at our 2019 monthly chapter meetings.
- Our Educational Series featured relevant programs from mindfulness to planned giving to grassroots fundraising and more to help us grow in the fundraising profession.
- With sponsor support, two of our sessions were **FREE** or a **REDUCED RATE for all attendees making** them more accessible for our fundraising community while encouraging non-members and people new to the field to check out AFP.
- We continued to divide our Educational Series between Nakoma Golf Club and Goodman Community Center (and will do so again in 2020), offering our attendees different experiences at these venues.



2019 MONTHLY MEETING SPONSORS

- Alliant Energy Foundation
- Badger Group
- Katz Krantz CORE Fund
- Park Bank
- Wipfli
- Wisconsin Association of Charitable Gift Planners
- Zendesk



A special thanks to our monthly meeting sponsors!

FUNDRAISING DAY WISCONSIN

- **Five national speakers:** Tammy Zonker, Julia Campbell, Marc A. Pitman, Jeff Schreifels, Jason Lewis. Speakers gave high remarks for the hospitality they received here in Wisconsin. Feedback was high for all speakers.
- **Expenses were reduced** by \$6,000 in 2019 with a concerted effort to be efficient with our resources.
- **2019 Committee** - Lisa Pieper (Southeast Member), Mary Donahue (Madison Member), Sharon White (Madison Member), Julie Ehrke (Madison Member), Laura Emir (Southeast Member), Kelly Rickman (Southeast Member), Aimee Furrie (Madison Member), Dawn Groshek (Southeast Member), Jen Davie (Madison Member)

2019 Attendance = 334



2019 FUNDRAISING DAY WISCONSIN SPONSORS

SVA - Certified Public Accountants

McDonald Schaefer

Numbers 4 Nonprofits

Wisconsin Foundation Alumni Association

The Artful Asker

Edgewood College

Spano Pratt

Greater Giving

Greater Milwaukee Foundation

The Badger Group

Ter Molen Watkins & Brandt, LLC

Wisconsin Philanthropy Network

Community Brands (Gesture.com)

UW Milwaukee - Helen Bader Institute for Nonprofit
Management

Abbey Group

Kendra Scott

Innovative NonProfit

A special thanks to our event sponsors!



NATIONAL PHILANTHROPY DAY AWARDS LUNCHEON

- 7 honorees, representing philanthropic heroes for the arts, social service, healthcare, and animal welfare communities
- Over \$43,000 in sponsorships, which support chapter scholarships and programming

2019 Attendance = 378



2019 NATIONAL PHILANTHROPY DAY SPONSORS

- CUNA Mutual Group
- Madison Community Foundation
- National Guardian Life Insurance Company
- Overture Center for the Arts
- Alliant Energy Foundation
- Edgewood College
- Wisconsin Foundation and Alumni Association
- American Girl
- Associated Bank
- Full Compass
- Johnson Bank
- SSM Health St. Mary's Foundation
- TASC
- Unity Point Health Meriter Foundation
- MGE Foundation
- Friends of Wisconsin Public Television
- Flad Development & Investment Corp
- Wisconsin Association of Charitable Gift Planners
- United Way of Dane County & United Way Foundation
- WISC-TV
- SVA
- Wegner CPAs
- US Bank
- Oak Bank
- Timpano Consulting
- Community Shares of Wisconsin
- J.H. Findorff & Son, Inc.
- American Printing
- Madison Opera
- Madison Symphony Orchestra
- Midwest Family Broadcasting

A special thanks to our event 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.



2019 BUDGET

	Approved Budget 2019	Actual as of 12/3/2019	Percentage Variance
Revenue:			
Philanthropy Day sponsorships	44,000.00	41,700.00	-5.2%
Philanthropy Day registration	15,000.00	9,300.00	-38.0%
Philanthropy Day in-kind	16,250.00	28,873.00	77.7%
Monthly chapter program meetings	11,000.00	8,223.00	-25.2%
Monthly chapter program sponsor	4,050.00	2,250.00	-44.4%
Fundraising Day Wisconsin	45,000.00	69,790.83	55.1%
Professional Development	3,300.00	430.00	-87.0%
Young Professionals	200.00	145.00	-27.5%
Job Board	6,750.00	6,135.00	-9.1%
AFP member rebate	9,800.00	9,000.00	-8.2%
Be the Cause rebate	220.00	238.50	8.4%
Interest	525.00	1,026.99	95.6%
Total revenue	156,095.00	177,112.32	13.5%
Expenses:			
Philanthropy Day	24,850.00	19,072.18	-23.3%
Philanthropy Day in-kind	16,250.00	28,873.00	77.7%
Programs	12,875.00	12,705.63	-1.3%
Fundraising Day Wisconsin	40,800.00	53,925.62	32.2%
Professional Development	2,600.00	1,570.24	-39.6%
Communications	8,500.00	2,804.66	-67.0%
Scholarships	13,000.00	5,652.00	-56.5%
Membership	2,550.00	889.75	-65.1%
Diversity	100.00	0	-100.0%
Young Professionals	900.00	913.54	1.5%
Administration	33,670.00	37,703.55	12.0%
Total expenses	156,095.00	164,110.17	5.1%
Net income	0	13,002.15	

2020 PROPOSED BUDGET

Revenue:

Philanthropy Day sponsorships	44,250.00
Philanthropy Day registration	15,000.00
Philanthropy Day in-kind	26,400.00
Monthly chapter program meetings	11,000.00
Monthly chapter program sponsor	3,600.00
Fundraising Day Wisconsin	67,000.00
Professional Development	600.00
Young Professionals	300.00
CFRE review course	3,600.00
Job Board	5,900.00
AFP member rebate	8,500.00
Be the Cause rebate	220.00
Interest	890.00
Total revenue	187,260.00

Expenses:

Philanthropy Day	24,700.00
Philanthropy Day in-kind	26,400.00
Programs	12,600.00
Fundraising Day Wisconsin	59,800.00
Professional Development	600.00
Communications	6,800.00
Scholarships	14,560.00
Membership	1,250.00
Diversity	100.00
Young Professionals	700.00
CFRE review course	3,120.00
Administration	36,630.00
Total expenses	187,260.00
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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