

# Wisconsin Philanthropy Network's 2017 Statewide Conference on Philanthropy

## WELCOME

### A message from the Conference Co-Chairs:

Wisconsin's communities are a tapestry of the missions and values of our state's philanthropic partners. Whether your organization seeks to fund meaningful programs that address our state's needs and challenges, or is committed to delivering services that directly meet these needs, the partnership of these hardworking professionals ensures a better quality of life for Wisconsin residents.

Wisconsin Philanthropy Network is honored to again celebrate this partnership with our 2017 Statewide Conference on Philanthropy. Join us on **Wednesday, November 1, 2017** in Milwaukee at the recently renovated Italian Community Center, with catering provided by the renowned Bartolotta Restaurants. It promises to be a day of collaboration with Wisconsin's philanthropic leaders. As the state's largest gathering of its kind, the conference attracts a diverse group of foundation and nonprofit professionals, trustees and philanthropists.

This full day event will highlight the goals, strategies and successes of our peers and bring together some of philanthropy's best thought leaders, including keynote speakers Paul Schmitz and Robert Egger, both named to *The Nonprofit Times' Power & Influence Top 50* list.

Don't miss this thought-provoking and inspiring day of discussion around common goals, while networking with professionals in our field and sharing insightful lessons on how to best serve our Wisconsin communities.

Can't wait to see you there!



**Julie Bauer**  
WPN Board Member  
Executive Director  
Alliant Energy Foundation



**Jim Marks**  
Senior Advisor  
United Way of Greater Milwaukee  
and Waukesha County

## Thank you to our sponsors:



When

**Wednesday, November 1, 2017**  
**8:00 A.M. to 4:15 P.M.**

Where

**Italian Community Center**  
**Milwaukee, Wisconsin**

## TESTIMONIALS



"I can't overstate the value of the interaction, idea sharing, inspiration, and camaraderie that I gain from WPN conferences and events. For all of us in this field, a break from the hectic day-to-day to be with colleagues and learn from each other is invaluable."

➤ Marcus White, Greater Milwaukee Foundation



"From an amazing keynote speaker to meaningful breakout sessions, the conference was a great investment of our staff's time. I look forward to the next conference so I can continue to network with other Wisconsin development professionals and to keep offering high quality education for our team."

➤ Mark Shapiro, Harry & Rose Samson Family Jewish Community Center



## EVENT SCHEDULE

**8:00 A.M. - 9:00 A.M.**

Registration, Continental Breakfast, Exhibitor Hall Opens

**9:00 A.M. - 9:15 A.M.**

Welcome

**9:15 A.M. - 10:15 A.M.**

Morning Keynote with Paul Schmitz

**Everyone Leads: Building the Culture for Collective Impact**

**10:30 A.M. - NOON**

Morning Concurrent Sessions:

**Ready...Set...Go: Preparing for Collaboration**

**The Power of Places**

**The Intersection of Creativity and Grantmaking**

**12:15 P.M. - 1:15 P.M.**

Networking Lunch (Ballroom) OR Executive Leadership Lunch  
(see description)

**1:30 P.M. - 3:00 P.M.**

Afternoon Concurrent Sessions:

**From Trends to Treasure: Understanding Today's  
Philanthropic Landscape**

**Once Upon a Time...How to Tell Stories of Impact**

**The Racial Kaleidoscope: Achieving Equity**

**3:15 P.M. - 4:15 P.M.**

Afternoon Keynote with Robert Egger

**United We Stand; Divided We Fall**

**4:15 P.M.**

Closing Remarks

### Morning Keynote

**9:15 A.M. - 10:15 A.M.**

**Paul Schmitz**

#### **Everyone Leads: Building the Culture for Collective Impact**

Collective impact requires as much rigor in building the collective as it does in achieving impact. Ultimately, its success requires both leadership and a leadership culture that value inclusion, trust, continuous learning, and accountability. Join internationally known author and speaker Paul Schmitz on a journey through riveting stories of collective impact and community change efforts, while discovering insights sure to change your leadership style. You will leave feeling inspired, motivated and filled with a message of hope.

*Paul Schmitz is CEO of Leading Inside Out, a nonprofit and philanthropic advisory firm; Senior Advisor to The Collective Impact Forum; and an Innovation Fellow at Georgetown University's Beeck Center for Social Innovation and Impact. Paul is the author of **Everyone Leads: Building Leadership from the Community Up**. Paul previously served as CEO of the national leadership development organization Public Allies, was a social innovation advisor to the White House, and has been named three separate years to **The Nonprofit Times' Power & Influence Top 50** list of nonprofit leaders in America.*



### Afternoon Keynote

**3:15 P.M. - 4:15 P.M.**

**Robert Egger**

#### **United We Stand; Divided We Fall**

Today's nonprofit organizations and funders often find themselves in a vacuum. Both are dedicated to addressing community needs and each has something vital to contribute, but may find it challenging to collaborate in programming and problem solving.

Robert Egger sees the philanthropic community as a giant ecosystem, not siloed islands standing alone. Each participant has a role to play; that role is enhanced when it recognizes—and respects—the others.

As the Founder and President of L.A. Kitchen and the leader of the D.C. Central Kitchen for 24 years, Robert has seen first-hand the power of an idea and how much can be accomplished when everyone is working toward a common goal. Come hear his story of how these kitchens, which recover locally sourced food to fuel a culinary arts training program for individuals leaving foster care or incarceration, have helped meet critical hunger needs while creating jobs.

*Noted nonprofit author and advocate Robert Egger was included in **The NonProfit Times' Power & Influence Top 50** list of nonprofit leaders from 2006-2009. Robert was also named one of the **L.A. Weekly's 2016 People of the Year** and 2015's **Conscious Leader of the Year** by **Conscious Capitalism**.*



## Morning Concurrent Sessions

10:30 A.M. - NOON

### Ready..Set..Go: Preparing for Collaboration

Today's buzzword in philanthropy is collaboration. Yet funders and nonprofits have discovered that achieving consensus—even around shared values or core issues—can be challenging. Organizations that strive for collaboration first need to ensure that they foster an environment that is “collaboration-ready.” Stephanie Chan, from Grantmakers for Effective Organizations, will present the framework needed to build an internal culture conducive to engaging in effective collaboration.

- **Presented by Stephanie Chan**  
Program Specialist  
Grantmakers for Effective Organizations

### The Power of Places

Community Placemaking is a people-centered approach to the design and management of public spaces. Now a global movement, yet rooted in the core values of local expertise, civic innovators are using placemaking to connect an area's economy, arts and culture, and public spaces for the greater good of the community.

Join this session to learn more about how to increase civic engagement, integrate economic sectors, and generate sustainable community wealth by utilizing the assets of a specific place. For example, a consortium of local partners is currently collaborating on the Beerline Trail Neighborhood Development Project in the Riverworks area. The project's goal is to enrich the lives of residents by promoting health, well-being and prosperity through increased circulation of resources, ideas, and creativity. As a vibrant public space, the trail serves as a powerful symbol of access and equity.

- **Presented and Moderated by Julia Taylor**  
President  
Greater Milwaukee Committee
- **Panelists Include:**  
Ellen Gilligan, President and CEO, Greater Milwaukee Foundation  
Darryl Johnson, Executive Director, Riverworks Development Corporation  
Bob Sorge, President and CEO, Madison Community Foundation  
Will Weider, President, Appleton Downtown, Inc.

### The Intersection of Creativity and Grantmaking

Whether you are a nonprofit trying to navigate websites, articulate your case, and prepare follow-up reports; or a funder buried in your grant review process, today's grant funding environment can be daunting.

Indulge in this potentially game-changing discussion with author and consultant Bill Somerville as he explains “venture philanthropy” such as quick response grants and paperless giving. Then, hear from a panel of funders who have implemented innovative ways to enhance efficiency without sacrificing effectiveness.

- **Presented and Moderated by Bill Somerville**  
Founder  
Philanthropic Ventures Foundation
- **Panelists Include:**  
JoAnne Anton, Director of Charitable Giving, Herb Kohl Philanthropies  
Salli Martyniak, President, Forward Community Investments  
Sandi Roehrig, Executive Director, Fond du Lac Area Foundation

## Executive Leadership Lunch

12:15 P.M. - 1:15 P.M.

## Senior Staff & Trustees

### Nonprofit Investments: Aligning Mission with Financial Outcomes

Increasingly, nonprofit organizations are faced with how to align and execute their mission with critical business decisions. From selecting a supplier or money manager, to identifying portfolio investment criteria, to deploying capital for mission-related investing, missions and values can collide with performance and outcomes.

Come for lunch with your executive management peers and join Northern Trust for an overview of the spectrum of responsible investing strategies—from Socially Responsible to ESG to Impact—as well as a lively discussion on how the use of these strategies is growing among nonprofit organizations.

- **Darius Gill**  
Senior Vice President  
Wealth Management  
The Northern Trust Company
- **Deborah L. Kasemeyer**  
Senior Vice President  
Director of Community Development & Investments  
The Northern Trust Company
- **Emily Lawrence**  
Senior Product Specialist  
The Northern Trust Company

## Afternoon Concurrent Sessions 1:30 P.M. - 3:00 P.M.

### From Trends to Treasure: Understanding Today's Philanthropic Landscape

What motivates high net worth households to give—or to stop giving? How do gender differences impact your success with donors? What's the best way to engage Millennials, those from the Greatest Generation, and everyone in between? Hear the latest philanthropic strategies and share practical ideas designed to reach the untapped capacity of women's philanthropy, generational giving, and other trends. Participants will take away practical techniques they can incorporate right away.

- ▶ **Presented by Angela White, CFRE**  
Chief Executive Officer  
Johnson, Grossnickle & Associates

### Once Upon a Time...How to Tell Stories of Impact

True stories are a critical communication tool for both nonprofits and funders. *Ex Fabula*, a Milwaukee nonprofit that strengthens community bonds through the art of storytelling, excels in teaching organizations how to identify, craft and share meaningful stories of impact. Discover how the brain processes personal stories, learn the elements of an effective story, and explore techniques to collect and leverage them within your organization. This energetic session will combine lecture, hands-on activities and real-life stories to create an interactive experience.

- ▶ **Presented by Megan McGee**  
Executive Director  
Ex Fabula

### The Racial Kaleidoscope: Achieving Equity

Applying a racial equity lens to philanthropy sharpens funders' insights and encourages nonprofits to identify new solutions for their priority areas. Whether committed to enhancing equity in your grantmaking organization, or seeking funding for programs targeting diverse populations, you will be inspired by this lively discussion of equity in philanthropy. Hear from a panel of practitioners who will present their success in incorporating a racial equity lens while advancing their missions, and take home practical tools for enhancing your organization's racial equity success.

- ▶ **Moderated by Steve Goldberg**  
Retired  
CUNA Mutual Group Foundation
- ▶ **Panelists Include:**  
Sabrina W. Robins, Ph.D., Director-Operations & Supplier Diversity  
Champion, ManpowerGroup Solutions  
Darlene Russell, Senior Program Officer, Greater Milwaukee Foundation

## EXHIBITORS



Don't miss the exhibitors from national and local companies and organizations. Stop by to receive the latest information on products and services that are of benefit and interest to members of the nonprofit and grantmaking communities.

**The exhibit booths are open from 8:00 A.M. - 4:15 P.M.**

## ABOUT WISCONSIN PHILANTHROPY NETWORK

Wisconsin Philanthropy Network (formerly Donors Forum of Wisconsin) is Wisconsin's only professional membership association of grantmakers working together to support and promote effective philanthropy. WPN membership represents a diverse group of private foundations (family, independent, and corporate), corporate giving programs, community foundations, higher education and healthcare foundations, donor-advised funds, charitable trusts and individual philanthropists who together represent over \$7 billion in assets and invest over \$600 million annually to improve the quality of life for Wisconsin residents. WPN provides its members quality programming, free research services, and networking opportunities. For more information, visit our website at [wiphilanthropy.org](http://wiphilanthropy.org).