For my 2nd year as President and CEO of the Wisconsin Philanthropy Network (WPN), I am honored to join an organization that never lost sight of its goals: offering its members valuable professional development, meaningful networking opportunities, and customized, relevant research resources. In 2017, WPN’s commitment to promoting nonprofit leadership resources for our membership.

As you examine this report, we invite you to not only join us in celebrating another great year, but also consider how WPN can collaborate with you to provide the best membership value. I, along with our amazing staff – Caty, Amanda and Laura – am here to offer their expertise with your research, programming and membership needs. Most importantly, thank you for the role you, our members, play in growing Wisconsin’s philanthropic spirit. It is gratifying knowing that, together, we can positively impact so many lives in our local communities, nation, and world.

Leadership change presents an opportunity for an organization. Through the efforts of a dedicated team and engaged Board of Directors, Wisconsin Philanthropy Network (WPN) seized this opportunity and enjoyed a successful 2017, constantly gaining momentum and advancing its mission of promoting philanthropy throughout its leadership transition. When I came on board as WPN’s new President and CEO, I was honored to join an organization that never lost sight of its goals: offering its members valuable professional development, meaningful networking opportunities, and customized, relevant research resources. Innovative programming content was a hallmark of our 2017 success. WPN proudly hosted Dorothy and Lillian Gish Prize winning author, educator and actor Anna Deavere Smith, who presented Notes from the Field: Community Perspectives, featuring Benefit Chicago, a collaboration mobilizing $100 million for impact investments by philanthropists to explore and re-evaluate how they can most effectively utilize their resources. Finally, tour-wide and regional opportunities to enhance our position as a statewide thought-leader of effective philanthropy resources for our membership.

WPN members also had an opportunity to attend programming such as the Investing in Communities Luncheon, featuring Benefit Chicago, a collaboration mobilizing $100 million for impact investments by nonprofits and social enterprises. In addition, our inspiring statewide Conference on Philanthropy, regional roundtables and educational programming such as our Grantmaker Mini Bootcamp, offered opportunities for philanthropists to explore and re-evaluate how they can most effectively utilize their resources. Finally, in response to statewide demand, WPN continued its commitment to promoting nonprofit leadership opportunities through the Wisconsin Leadership Development Project, the Sustainability and Impact Alumni Project, and Leadership Advanced, a cohort-based leadership training program.

As we look to the future, we are laser-focused on adding member value. Through our growing influence – 18 new members joined WPN in 2017 – we will facilitate insightful discussions, promote collective impact, and embrace regional opportunities to enhance our position as a statewide thought-leader of effective philanthropy resources for our membership.

As you examine this report, we invite you to not only join us in celebrating another great year, but also consider how WPN can collaborate with you to provide the best membership value. I, along with our amazing staff – Caty, Amanda and Laura – am here to offer their expertise with your research, programming and membership needs. Most importantly, thank you for the role you, our members, play in growing Wisconsin’s philanthropic spirit. It is gratifying knowing that, together, we can positively impact so many lives in our local community, nation, and world.
While attending my first WPN networking event, I connected with Ann Terrell from the MPS Foundation. Right away we found common interests in advancing quality education in Milwaukee. Formally, Wisconsin Lutheran College and MPS are beginning to develop a new partnership strategy to help combat the issue of a lack of diversity in the teaching roles in our city’s classrooms. After meeting Ann, I had spent quite a bit of time learning about the MPS Foundation’s efforts to support students in Milwaukee. We are still working to refine our partnership, but I firmly believe without the introduction from WPN, we may have never connected. Rich Mannisto, Wisconsin Lutheran College

2017 Statewide Conference on Philanthropy

Highlighted by insightful keynotes from Paul Schmidt and Robert Egger, WPN’s biennial conference also featured cutting-edge topics such as racial equity and community placemaking. In addition, the conference presented its inaugural Executive Lunch, designed to assist organizations with aligning their investment objectives to their missions.

Notes from the Field: Community Perspectives

Nearly 600 community members, including 150 area middle and high school students, explored hard-hitting issues like gun violence and racial inequality through Anna Deavere Smith’s documentary theatre presentation. Based on interviews of individuals personally affected by these challenges, it set the stage for an interactive conversation on how they impact our neighborhoods – and how the philanthropic community can respond.

Research Services

As philanthropy becomes increasingly complex and the amount of staff resources more limited, WPN data and resources such as benchmarking tools, sample metrics and funding policies allowing them to stay informed of regional, national, and international trends, and make strategic and effective funding decisions.

In 2017, over 50% of WPN’s members requested and received research services. This saved 154 hours of member staff time and over $18,000 in external research.

Research Through the Years

2014 2017

Number of Requests 66 127
Hours of Research Provided 112.5 60
Members Receiving Service 37 60

In-Kind Donations

Foley & Lardner LLP, Zilber Family Foundation; Montes Creative, Scott Selzer; The Burke Foundation

Event Hosts

Alliant Energy Foundation, American Family Insurance Dreams Discover Foundation; Bader Philanthropies, Inc.; Brewers Community Foundation; Community Foundation of North Central Wisconsin, CUNA Mutual Group Foundation; Great Lakes Higher Education Guaranty Corporation; Green Bay Rotary Community Foundation; Madison Community Foundation; National Guardian Life Insurance Group; Rockwell Automation

Special Thanks to Our Leadership Development Initiative Benefactors

Leadership support from Greater Milwaukee Foundation; Zilber Family Foundation; Prairie Springs: The Paul Fleckner Trust, R.A. Stevens Foundation; Rockwell Automation; Siebert Lutheran Foundation; The Burke Foundation

Sustainability and Impact Alumni Project

Bader Philanthropies, Inc.

Wisconsin Leadership Development Project

Greater Milwaukee Foundation, Zilber Family Foundation, The Burke Foundation
**The Power of Collaboration**

Leadership Advanced is an innovative approach to leadership development for nonprofit and grantmaker executive directors and senior managers. WPN coordinates this in-person professional development training with facilitators Steve Zimmerman, Spectrum Nonprofit Services; and Mary Stelletello, Vista Global Coaching and Consulting.

With 25+ years of leadership experience, plus a background that includes an MBA and the Nonprofit Management Executive Education Course at the Harvard Business School, Ginger Duiven wasn’t exactly looking for additional leadership training. However, when she received an invitation to participate in the 2017 Leadership Advanced (LA) cohort, she immediately accepted. As it turned out, the timing could not have been better.

As the Executive Director of Literacy Services of Wisconsin, Ginger was leading a strategic planning process and preparing for a merger that would double the size of the organization. In spite of an impressive resume of diverse experiences, this was unfamiliar territory. "It was a pivotal time in my career," Ginger explained. "I needed to bring our new team together and create a unified culture. The support of my LA cohort was invaluable. It was something steady through an otherwise turbulent time."

In addition to shrugging up my confidence to navigate a major strategic planning process, LA provided me with lifelong tools such as the Strength Finder and Leadership Inventory. "And, as the leader of an organization dedicated to adult learners, Ginger already knew that didactic teaching was not the way; I needed to be more effective. "The program featured a social innovation (SI) pitch competition, giving participants the opportunity to create effective SI models. Winners were Community Warehouse ($25,000), Lead2Change ($20,000), and ArtWorks for Milwaukee ($17,500).

The Sustainability and Impact Alarm Project, facilitated by AppRobo LLC, is an executive education project designed for nonprofit leaders. It encourages the use of design thinking and lean startup methods for exploring sustainable impact in their organization and for the communities they serve. The program featured a social innovation (SI) pitch competition, giving participants the opportunity to create effective SI models. Winners were Community Warehouse ($25,000), Lead2Change ($20,000), and ArtWorks for Milwaukee ($17,500).

Ginger added, "I’ve participated in learning opportunities before. This was definitely one of the best. Mary and Steve are excellent facilitators. Ensuring I will have access to them in the future is incredible, they are outstanding resources."

The past three years we have utilized Leadership Advanced (LA) as a partner in our philanthropic efforts. We have funded participants due to the 100% positive feedback from participants on the impact the program has had on their effectiveness as a leader. Leadership Advanced has provided a structure for us to move beyond grantmaking with the organizations in which we invest.

**Use of Funds**

<table>
<thead>
<tr>
<th>Source of Funds: (Unrestricted Activity Only)</th>
<th>Grants/Donations, 16%</th>
<th>Program Revenue, 10%</th>
<th>Program Related Revenue, 10%</th>
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<tr>
<td>Membership Dues, 50%</td>
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<td>Building/Occupancy, 7%</td>
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<td><strong>Total Temporarily Restricted Assets</strong></td>
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</table>

**Source of Funds** (Unrestricted Activity Only)

**WPN Financials**

Lunch & Learn Showcase: A Great Way to Network

I was eager to attend WPN’s Lunch & Learn Showcase event featuring three local veteran organizations: the Center for Veteran Issues, Camp Hometown Heroes, and Healing Patriots. Since UW-Milwaukee (UWM) is home to over 1,200 veteran students, it is important to stay connected with veteran organizations. One organization stood out for me – Camp Hometown Heroes, which engineered a need for camp grief counselors.

At UWM’s Helen Bader School of Social Work, many students are preparing to be social workers. I introduced Andrew Gappa, Hometown Heroes’ Director of Programs and Facilities, to Jeanne Wagner, UWM’s Director of Veteran and Military Services. Hopefully, several students may be able to assist Camp Hometown Heroes campers who are grieving the loss of a family member through their service to our country.

Whatever the outcome, Lunch & Learn Showcase is an effective way to network.

—Joe Middeldorp, UWM Foundation

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We are extremely grateful to WPN for helping us initiate a relationship with the Center for Veteran Issues at UWM. Our partnership has inspired and enabled many student veterans to become counselors for our campers who lost a loved one.

—Andrew Gappa, Camp Hometown Heroes