



wisconsin
philanthropy
network

Your partner for effective giving



2017 Annual Report

Connect.

Educate.

Enhance.

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 services.

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*. Ms. Smith's presentation raised awareness of challenges such as gun violence and racial inequality, and set the stage for an interactive discussion on how these issues impact all of us.

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 communities, nation, and world.

Tony Shields
President and CEO

Board Officers

Karen Wilken, Chair
Kern Family Foundation

Steve Goldberg, Vice Chair
CUNA Mutual Group Foundation
Retired

Erin Frederick, Secretary
Zilber Family Foundation

Ken Robertson, Treasurer
Greater Milwaukee Foundation

Board Members

Julie Bauer
Alliant Energy Foundation

Patricia Contreras
Rockwell Automation

Marybeth Cottrill
BMO Harris Bank

Curt Detjen
Community Foundation for the Fox Valley Region

Lisa Hiller
Bader Philanthropies, Inc.

Amy Kerwin
Great Lakes Higher Education Guaranty Corporation

Jason Kohout
Foley & Lardner LLP

Kathryn Leverenz
Mathematics Institute of Wisconsin

Jay Scott
Prairie Springs: The Paul Fleckenstein Trust and RA Stevens Foundation

Welcome 18 New Members

Bemis Company Foundation
BMO Harris Bank
Edgewood College
Gilbert Llanas
Heil Family Foundation
McGinnity Family Foundation
Midwest Asset Management
Milwaukee Public Schools Foundation
Schlecht Family Foundation

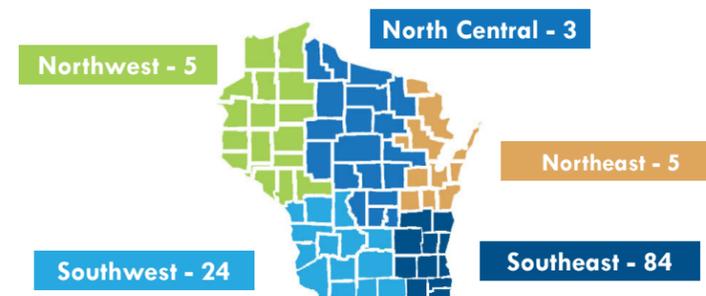
Cindy Tang
United Way of Dane County
UnityPoint Health - Meriter
UW La Crosse Foundation
UWM Foundation
Waukesha County Technical College Foundation
WHEA Foundation, Inc.
Wisconsin Lutheran College
Women's Fund of Greater Milwaukee

Membership Composition



* Consisting of nearly 600 individual grantmakers

Geographic Distribution of WPN's 121 Members



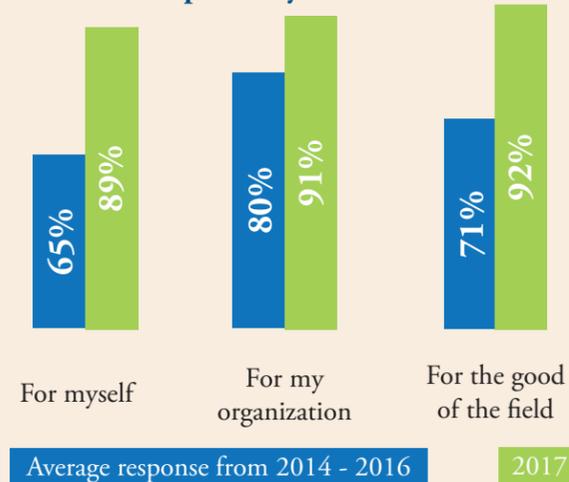
And the Survey Says

95% remain members so they can NETWORK AND LEARN FROM OTHERS in the field.

85% remain members so they can be part of the ONLY PHILANTHROPIC MEMBERSHIP ASSOCIATION IN WISCONSIN.

85% remain members so they can participate in STRENGTHENING, PROMOTING, AND ADVANCING THE FIELD.

Members state that WPN is worth the investment primarily:



The Power of Networking

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. Ironically, Wisconsin Lutheran College was beginning to develop a new partnership strategy to help combat the issue of a lack of diversity in the teaching ranks of our city's classrooms. Prior to meeting Ann, I had spent quite a bit of time



and energy looking for key individuals in MPS to begin a partnership. Ann was able to point me to "the right person." In a matter of days, my team met with April Swick from MPS to begin a dialogue on where Wisconsin Lutheran College and MPS might

collaborate on chipping away at the lack of diversity of educators in Milwaukee. We are still working to refine our partnership, but I firmly believe without the networking opportunity provided by WPN, we may have never connected.

- Rich Mannisto, Wisconsin Lutheran College

I second Rich's endorsement of WPN's networking! Community partnerships are essential to MPS Foundation's successful support of the Milwaukee Public Schools – and networking opportunities such as what we have found with WPN can often be the start of those partnerships. WPN provides the MPS Foundation the opportunity to connect with others who are doing similar work to advance public education and support students in Milwaukee.

- Ann Terrell, MPS Foundation

Programming & Networking

Skill-building, thought-leadership and collaboration are the cornerstones of WPN programming. Highlighted by the *Statewide Conference on Philanthropy* and Anna Deavere Smith's *Notes from the Field: Community Perspectives*, 2017 offerings attracted nearly 1,200 members of Wisconsin's philanthropic community. Other opportunities included *Grantmaker Mini Bootcamp*, *Investing in Communities Luncheon*, regional *Funder Roundtables*, *Member Networking events*, *Lunch & Learn: Nonprofit Showcases*, *Community Foundation CEO Luncheons*, and *Breakfast with a Grantmaker*, a collaboration with the Southeastern Wisconsin AFP chapter.



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.

“ Most valuable was the theme of equity that was woven through many of the presentations and panels. It was nice to see WPN make this a central issue, while still providing a variety of topics.”

Notes from the Field: Community Perspectives

Nearly 600 community members, including 150 area middle and high school students, explored hard-hitting issues such as 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 discussion on how they impact our neighborhoods -- and how the philanthropic community can respond.

“ We work with teens; it's refreshing to hear perspectives on their challenges in education and society at large.”

“ It was a gift to experience Ms. Smith's talent about topics that are quite relevant to the Milwaukee community.”

“ Anna Deavere Smith was a power, sharing a unique form of storytelling and theater.”

Research Services

As philanthropy becomes increasingly complex and staff resources more limited, WPN members' utilization of its free research services increased once again in 2017. Research gives members access to customized research, comprehensive 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 **\$18,500** in external research

Research Through the Years

	2014	2017
Number of Requests	66	127
Hours of Research Provided	112.5	154
Members Receiving Service	37	60

“ Wow, this is fantastic!! Thank you so much, Caty. I really appreciate your help, and so quickly! Thanks a million.”

“ You've gone above and beyond. This is really, really helpful. Thank you so very much.”

Special Thanks to Our Benefactors and Sponsors:

\$25,000 and above

Bader Philanthropies, Inc.; Daniel M. Soref Charitable Trust; Greater Milwaukee Foundation

\$5,000 - \$24,999

Alliant Energy Foundation; Siebert Lutheran Foundation; The Jane Bradley Pettit Foundation; Zilber Family Foundation

\$1 - \$4,999

Association of Fundraising Professionals - Southeastern Wisconsin; Baird Funds; Charles D. Jacobus Family Foundation; Community Foundation for the Fox Valley Region; Deutsche Asset Management; Fiduciary Management; Foley & Lardner LLP; Frank & Frank; Scott Gelzer; Great Lakes Higher Education Guaranty Corporation; Helen Bader Institute for Nonprofit Management; Latz & Company; Leading Transitions; Marquette Associates; Mathematics Institute of Wisconsin; Milwaukee Business Journal; Milwaukee Film; National Guardian Life Insurance Group; National Investment Services; Northwestern Mutual Foundation; Oshkosh Area Community Foundation; Prairie Springs: The Paul Fleckenstein Trust; Quarles & Brady LLP; Rexnord Foundation; Rockwell Automation; Spectrum Nonprofit Services; The Bartolotta Restaurants; The Northern Trust Company; United Way of Greater Milwaukee & Waukesha County; Waukesha County Community Foundation; We Energies Foundation; Wisconsin Public Service Foundation; Laura Worcester

In-Kind Donations

Foley & Lardner LLP; Zilber Family Foundation; Montae Creative; Scott Gelzer; The Burke Foundation

Event Hosts

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

Special Thanks to Our Leadership Development Initiative Benefactors

Leadership Advanced

Greater Milwaukee Foundation; Zilber Family Foundation; Prairie Springs: The Paul Fleckenstein Trust; R A Stevens Foundation; Rockwell Automation; Siebert Lutheran Foundation; The Brico Fund

Sustainability and Impact Alumni Project

Bader Philanthropies, Inc.

Wisconsin Leadership Development Project

Greater Milwaukee Foundation; Zilber Family Foundation; The Brico Fund



*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 expressed a need for camp grief counselors.



At UWM's Helen Bader School of Social Welfare, 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 Social Work Field Education. 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 Maddalena, UWM Foundation

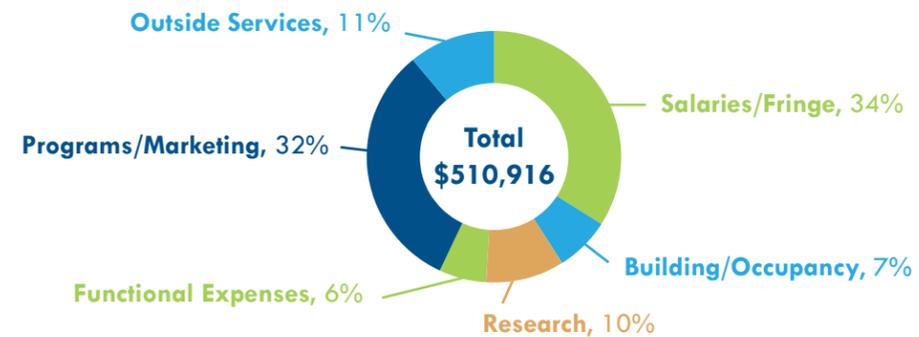
We are extremely grateful to WPN for helping us initiate a relationship with UWM Milwaukee's Health and Human Services Department. We are delighted to be interviewing excellent candidates to become counselors for our campers who lost a loved one.

- Andrew "Gaps" Gappa, Camp Hometown Heroes

Source of Funds (Unrestricted Activity Only)



Use of Funds (Unrestricted Activity Only)



Financial Overview

TOTAL ASSETS	\$600,796
TOTAL LIABILITIES	\$47,955
TOTAL UNRESTRICTED ASSETS	\$278,922
TOTAL TEMPORARILY RESTRICTED ASSETS	\$273,919
CASH AND CASH EQUIVALENTS, END OF YEAR ...	\$449,590

Led by its founder and leadership trainer Dan Grandone, the *Wisconsin Leadership Development Project (WiLD)* teaches participants how to engage others around their own core values, structure effective leadership teams, and make strategic choices that lead to measurable, effective action for change. In 2017, nearly 700 community and nonprofit leaders throughout Wisconsin participated in the *WiLD Project*.



The *Sustainability and Impact Alumni 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).



Leadership Advanced is an innovative approach to leadership development for nonprofit and grantmaker executive directors and senior managers. WPN coordinates this nine-session 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 experience, 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 shoring 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 always effective. "The cohort model, which encourages participants to learn from one another, aligns well with adult learning theory. It has given me insights into how to better interact with our clients."

Ginger added, "I've participated in learning opportunities before. This was definitely one of the best. Mary and Steve are excellent facilitators. Knowing 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 key leaders within the organizations we support to expose them to the curriculum and to become a contributing member of the LA Cohort. Leadership Advanced allows participants to focus on a specific leadership challenge and gain insights from the facilitators and the other participants.

We continue to fund 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.

- Jay and Carolyn Scott, R A Stevens Foundation and Prairie Springs: The Paul Fleckenstein Trust



Your partner for effective giving

Wisconsin Philanthropy Network
15850 W. Bluemound Road, Suite 204
Brookfield, WI 53005
262.317.6000
www.wiphilanthropy.org

Supporting and promoting effective philanthropy in Wisconsin