



wisconsin
philanthropy
network

Your partner for effective giving



Annual Report 2018

Dear Member:

In 2018, Wisconsin Philanthropy Network engaged hundreds of members in an unprecedented number of group discussions, one-on-one meetings, and regional and issue-based programs. WPN gained valuable insights informing the development of a forward-looking strategic framework to further advance effective philanthropy in Wisconsin. Our core services remain vital to promoting effective philanthropy: programming, networking, and research to build and enhance the state's philanthropic infrastructure.

Last year, more than 500 members of Wisconsin's philanthropic community participated in our programs, including regional roundtables, our ever-popular *Grantmaker Boot Camp*, *PEAK Grantmaking*, non-profit and neighborhood showcases, issue-based convenings and networking opportunities.

The *2018 Wisconsin Gives Report*, WPN's signature publication, provided philanthropic partners and other stakeholders with in-depth information about national and regional philanthropic trends, while deepening understanding of Wisconsin philanthropy. The report promotes the power of generosity and furthers WPN's commitment to building a culture of philanthropy.

In 2018, we also saw success with membership growth. WPN welcomed 17 new members representing virtually all of our member categories. Our geographic diversity also continues to grow: we welcomed new members from Central, Southwest and Southeastern Wisconsin.

As we look to the future, we are focused on member value and building philanthropic capacity within and amongst member organizations. We will continue to facilitate roundtables, convene specific philanthropic segments, and spotlight regional and national thought leaders to address the nuances, opportunities, and challenges our members face. Through our robust network, we will create insightful discussions, promote collective impact, embrace opportunities, and inspire generosity.

Thank you for your role in growing Wisconsin's philanthropic spirit. It is gratifying to know that, together, we are positively impacting so many lives in our communities, nation, and world.

Tony Shields
President and CEO

Steve Goldberg
Board Chair

WELCOME TO OUR 17 NEW MEMBERS!

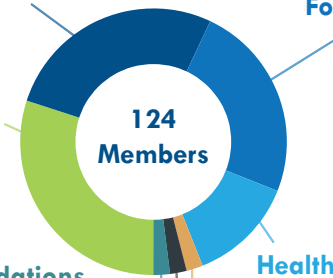
Bronfman E.L. Rothschild
Carthage College
Community Foundation of Central Wisconsin
Greater Sauk County Community Foundation
Inspiring Community
Komatsu
Madison Christian Giving Fund
The Madison Club Foundation
Medical College of Wisconsin
Milwaukee Film
Milwaukee Public Library Foundation
Old National Bank
PAVE
QBE North America
SSM Health
UW Foundation
Waukesha Education Foundation

MEMBERSHIP COMPOSITION

Corporate Foundations
& Giving Programs, 27%

Community
Foundations, 24%

Private
Foundations, 30%



Operating Foundations
& Supporting
Organizations, 2%

Healthcare &
Higher Education, 13%

Other, 2%

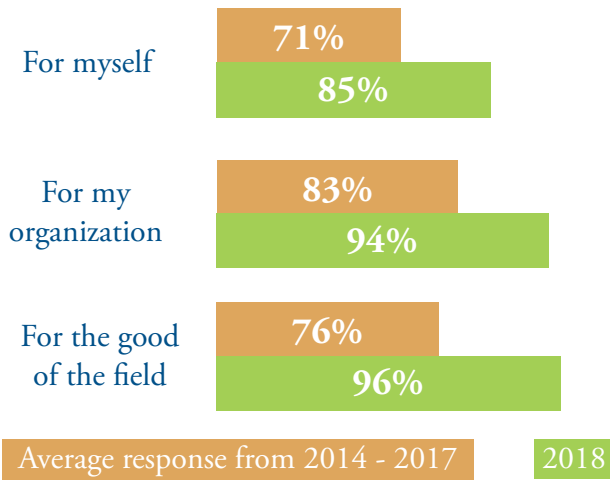
Individuals &
Retirees, 2%



Together, WPN's 124 members hold more than \$7 billion in assets and invest more than \$600 million annually to improve the quality of life for Wisconsin residents.

MEMBER FEEDBACK

Members state that WPN is worth the investment primarily:



94%

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

92%

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

92%

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

2018 WPN ACCOMPLISHMENTS

STRATEGIC PLAN

Informed by more than one hundred member meetings, board, and staff discussions, WPN's strategic areas of focus through 2020 include:

1. Strengthening a *Statewide Culture of Philanthropy* through storytelling to inspire excitement and action about generosity and giving.
2. Creating spaces for philanthropic discussions, next action, and collective impact with an emphasis on equitable and inclusive practices.
3. Developing a strategic approach to quality, statewide programming reflecting member interests.
4. Promoting thought leadership by convening conversations, facilitating discussions, and exploring philanthropic initiatives.

RESEARCH

WPN members made 150 research requests. WPN staff provided 140 hours of research which saved members over \$20,000 in external consulting costs.

2018 WISCONSIN GIVES REPORT

Produced biennially, the *Wisconsin Gives Report* provides an assessment of Wisconsin philanthropy, its statewide economic and social impact, and national trends in philanthropy. The report was distributed to members, made available to over 1,500 funders and nonprofits to deepen understanding about the state of philanthropy.

PROGRAMMING

ENGAGED
500+

philanthropic professionals in thought leadership through roundtables, networking events and one on one meetings.

NETWORKING

↑ 85%

increase in member attendance at exemplary essential, refresher trainings and issue briefings.

2018 WPN FINANCIALS

FINANCIAL OVERVIEW

TOTAL ASSETS.....\$681,703
 TOTAL LIABILITIES.....\$63,787
 WITHOUT DONOR RESTRICTION.....\$276,263
 WITH DONOR RESTRICTION.....\$341,653
 CASH AND CASH EQUIVALENTS,.....\$449,590

SOURCE OF FUNDS

(UNRESTRICTED ACTIVITY ONLY)

MEMBERSHIP DUES.....51%
 GRANTS & DONATIONS.....33%
 SPONSORSHIPS.....6%
 PROGRAM REVENUE.....2%
 PROGRAM-RELATED REVENUE..8%

Total Revenue:
\$471,293.51

USE OF FUNDS

(UNRESTRICTED ACTIVITY ONLY)

SALARIES/FRINGE.....41%
 PROGRAMS/MARKETING.....29%
 OUTSIDE SERVICES.....6%
 RESEARCH.....10%
 BUILDING/OCCUPANCY.....6%
 FUNCTIONAL EXPENSES.....8%

Total Expenses:
\$458,119.09

WPN BOARD OF DIRECTORS

Board Officers

Steve Goldberg, Chair

CUNA Mutual Group Foundation, Retired

Katheryn Leverenz, Vice Chair

Mathematics Institute of Wisconsin

Erin Frederick, Secretary

Zilber Family Foundation

Ken Robertson, Treasurer

Greater Milwaukee Foundation

Board Members

Julie Bauer

Alliant Energy Foundation

Melissa Baxter

Greater Milwaukee Committee

Patricia Contreras

Rockwell Automation

Curt Detjen

Community Foundation for the Fox Valley Region

Lisa Hiller

Bader Philanthropies, Inc.

Amy Kerwin

Ascendium Education Group

Jason Kohout

Foley & Lardner LLP

Jay Scott

*Prairie Springs: The Paul Fleckenstein Trust
R A Stevens Foundation*

Bob Sorge

Madison Community Foundation



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

Mathematics Institute of Wisconsin; Siebert Lutheran Foundation; The Jane Bradley Pettit Foundation; Rockwell Automation; Zilber Family Foundation

\$1 - \$4,999

Alliant Energy Foundation; Ascendium Education Group; Association of Fundraising Professionals; Charles D. Jacobus Family Foundation; Community Foundation for the Fox Valley Region; Community Foundation of North Central Wisconsin; Greater Green Bay Community Foundation; Helen Bader Institute for Nonprofit Management; Herb Kohl Philanthropies; Madison Community Foundation; National Guardian Life Insurance Group; National Investment Services; Northern Trust; Oshkosh Area Community Foundation; Prairie Springs: The Paul Fleckenstein Trust; Racine Community Foundation

IN-KIND DONATIONS

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

EVENT HOSTS

Alliant Energy Foundation; Carmen Schools of Science & Technology; Carroll University; Daniel Hoan Foundation; Foley & Lardner LLP; Fond du Lac Area Foundation; Greater Milwaukee Foundation; Greater Sauk County Community Foundation; Madison Community Foundation; Mathematics Institute of Wisconsin; The Burke Foundation; The Madison Club Foundation; The UWM Foundation; United Way of Greater Milwaukee & Waukesha County; UnityPoint Health - Meriter; UW Health & Quartz; Wisconsin Lutheran College; Zilber Family Foundation

SPECIAL THANKS TO OUR LEADERSHIP DEVELOPMENT INITIATIVE BENEFACTORS

LEADERSHIP ADVANCED

Rockwell Automation; Siebert Lutheran Foundation; The Brico Fund; Zilber Family Foundation

WISCONSIN LEADERSHIP DEVELOPMENT PROJECT

Lorraine Albright Flint Fund of the Greater Milwaukee Foundation; The Brico Fund; Zilber Family Foundation