



# ANNUAL Report 2019



wisconsin  
**philanthropy**  
network

Your partner for effective giving

Dear Partner in Philanthropy:

While last year seems long ago today, it's important to remember all that we accomplished as we strengthened and advanced effective philanthropy across the state. In 2019, Wisconsin Philanthropy Network exceeded goals, engaged members and convened a series of issue-based programs, philanthropic discussions, one-on-one meetings, regional opportunities – and, of course, held our flagship Statewide Conference on Philanthropy at Monona Terrace in Madison. Throughout, the WPN team gained valuable insights from you to inform our services and enhance effective practice in the sector and support a culture of philanthropy in Wisconsin. Through programming, networking, and research, WPN continued building the capacity of the philanthropic sector to respond to community needs and create new opportunities.

Last year, WPN connected with members more than 3,100 times and engaged 649 members, nonprofit representatives and others from across Wisconsin's philanthropic community through programs and events, including issues-based discussions, our ever-popular Grantmaker Boot Camp, PEAK Grantmaking, regional roundtables, neighborhood tours and more. We also enhanced our member communications, developed infrastructure to better understand and relay national trends, cultivated relationships with community-based stakeholders, and led efforts to promote the 2020 Census.

In 2019, we also saw success with membership growth. WPN welcomed 12 new members across all of our member categories, with a significant increase in health related and statewide funders. We also retained 93% of all members. As a result, our geographic diversity continues to grow and extend across the state.

As we look to the future in an ever-changing world, we continue to be inspired by the awesome role philanthropy plays in supporting the strength, vitality and health of Wisconsin communities. As we move forward, we will continue to make connections, facilitate discussions, convene philanthropic stakeholders, highlight best practice in the field, and bring statewide and national resources to help address the opportunities and challenges you face. Through a robust and supportive network, we will promote collective impact, embrace opportunities, and inspire generosity.

Thank you for your role in growing Wisconsin's philanthropic spirit. We are honored to partner with you, knowing that together, we build the power of philanthropy and positively impact so many lives in our communities, state and beyond.

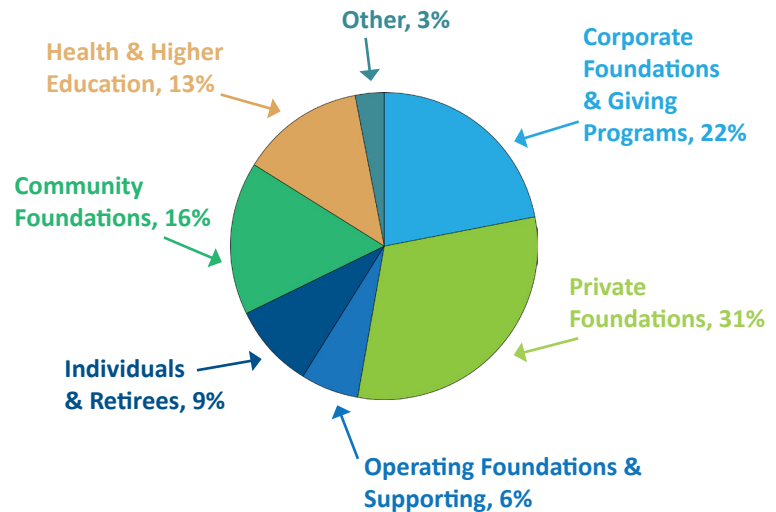
Tony Shields  
President and CEO

Steve Goldberg  
Board Chair

## Welcome to Our New 2019 Members!

Advancing a Healthier Wisconsin Endowment  
Barry Mandel  
Forest County Potawatomi Foundation  
Greater Watertown Community Health Foundation  
IFF  
M3 Insurance  
Mark & Sally Egan Foundation  
Marquette University  
Marybeth Budish  
Rusk County Community Foundation  
United Way of Wisconsin  
Wisconsin Partnership Program

## Membership Composition



## 93% Member Retention Rate!



Together, WPN's 128 members hold more than \$7 billion in assets and invest more than \$600 million annually to improve the quality of life for Wisconsin residents.



# 2019 WPN ACCOMPLISHMENTS

## Strategic Planning/Organization Vision:

Together with the Board of Directors, continued work on our strategic planning framework, plan and execution of key activities to support the mission of WPN.

## Member Engagement:

WPN efforts resulted in more than 3,100 member touches through various activities, individual meetings, research, convenings and communication channels.

## Community Relations:

Cultivated outside relationships with community stakeholders to tell the story of philanthropy in Wisconsin, including panel participation, media opportunities as well as public presentations promoting Wisconsin philanthropy and the Wisconsin Gives Report.

## Democracy and Advocacy:

Led efforts to help members understand philanthropy's role in promoting and advocating for participation in the 2020 census.

## Programming:

Changed the dynamic of WPN's conference year programming by developing content programs in the areas of Evaluation & Measurement, Girls and Young Women's issues, the U.S. Census and place-based tours.

## Statewide Conference:

Developed, executed and promoted the Annual Statewide Conference, assuring alignment with WPN's strategic direction and set the stage for future programming in 2020 and beyond. More than 325 attendees and/or organizations participated in the conference.

## Additional/Enhanced Roundtables:

Expanded WPN's Roundtable model to include a new regional Roundtable in Northeastern Wisconsin, launched the new Corporate Funders Roundtable and reimagined the Educations Funders Roundtable to better leverage broader member engagement and participation.

## Enhanced Member Communications Mechanisms:

Created more effective member communications by streamlining traditional communications. Developed the very popular "InTouch with Tony" communications and utilized direct email to inform and engage members.

## National Trends and Opportunities:

Engaged in a more frequent and intentional level with the National Philanthropic influencers, resulting in better knowledge of the national philanthropic community and issues facing other philanthropic serving organizations (PSOs).

## MEMBER FEEDBACK

97%

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

92%

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

93%

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

Members feel that WPN is worth the investment:

89%

for myself

88%

for my organization

99%

for the good of the field

## 2019 WPN FINANCIALS

### FINANCIAL OVERVIEW

TOTAL ASSETS.....	\$632,306
TOTAL LIABILITIES.....	\$125,956
WITHOUT DONOR RESTRICTION.....	\$339,457
WITH DONOR RESTRICTION.....	\$166,893
CASH AND CASH EQUIVALENTS....	\$440,433

### SOURCE OF FUNDS

(UNRESTRICTED ACTIVITY ONLY)

MEMBERSHIP DUES.....	36%
GRANTS & DONATIONS.....	38%
SPONSORSHIPS.....	12%
PROGRAM REVENUE & PROGRAM RELATED REVENUE.....	14%

### USE OF FUNDS

(UNRESTRICTED ACTIVITY ONLY)

SALARIES/FRINGE.....	50%
PROGRAMS/MARKETING.....	36%
OUTSIDE SERVICES.....	7%
RESEARCH.....	2%
BUILDING/OCCUPANCY.....	5%

Total Revenue:  
\$673,558.00

Total Expenses:  
\$728,587.00



# 2019 AREAS OF FOCUS

## 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 130 research requests. WPN staff provided 90 hours of research which saved members over \$20,000 in external consulting costs.

WPN's research services provide valuable information to help members stay current on Wisconsin issues, trends, policies and practices, and how national trends and issues play out in the state.

Research requests have included benchmarking reports, corporate social responsibility best practices, foundation job descriptions, policies, mission statements, and lists of funders. Requests have also included surveys of peer community foundations, corporate giving, and/or private/independent foundations in Wisconsin through listserv requests. Lastly, WPN has provided its members with Guidestar Charity Checks to verify charitable status, IRS deductibility code, and deductibility limitations using IRS data.

## STATEWIDE CONFERENCE ON PHILANTHROPY

In 2019, WPN brought together a record number of philanthropic leaders from across the state at WPN's biennial Statewide Conference on Philanthropy. The conference was designed to develop skills to further strategic philanthropy to positively impact and improve communities; share knowledge about trends, effective practices, and challenges; and explore possibilities for meaningful partnerships to advance shared goals.

Conference content was a direct reflection of areas of interest important to our members and will inform future programming: building a culture of philanthropy; building trust and minimizing power dynamics; philanthropy in rural Wisconsin; next generation leadership; and impact measurement.

- Building a Culture of Philanthropy One Brick at a Time
- Best Practices for Building Trust & Minimizing Power Dynamics
- Just off the Interstate-Philanthropy in Rural Wisconsin
- Next Generation Leadership
- Inspiring Funding Decisions through Impact Investing
- Invest Today for a Better Tomorrow

## PROGRAMMING & NETWORKING

500+

**PROGRAMMING:** Engaged-  
PHILANTHROPIC PROFESSIONALS IN  
THOUGHT LEADERSHIP THROUGH  
ROUNDTABLES AND NETWORKING  
EVENTS & ONE ON ONE MEETINGS.

85%

**NETWORKING:** UP!-INCREASE IN  
MEMBER ATTENDANCE AT EXEMPLARY  
ESSENTIAL, REFRESHER TRAININGS AND  
ISSUE BRIEFINGS.

# #WPNCULTURE

Philanthropy plays an important role in society, especially during challenging times. Philanthropy can more nimbly respond to seed innovation, as evidenced by the speed with which philanthropy across Wisconsin created emergency funds and distributed grants to respond to the COVID-19 crisis in the spring of 2020.

Philanthropy provides mission critical support to non-profit organizations serving individuals, communities, the environment and a range of issues from the arts to homelessness and education. Capital to both the non-profit and business sectors is critical to responding to emergency needs and also seeding solutions for community recovery.

As philanthropy quickly and critically responds to the 2020 Global Pandemic caused by the novel coronavirus, we are witnessing now more than ever the power and potential of a **culture of philanthropy** and the philanthropic ecosystem.

## 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  
*Waukesha Education Foundation*

Patricia Contreras  
*Rockwell Automation*

Frank Cumberbatch  
*Bader Philanthropies*

Curt Detjen  
*Community Foundation for the Fox Valley Region*

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 2019 BENEFACTORS AND SPONSORS:

### Grants & Sponsorships

#### \$25,000 AND ABOVE

Bader Philanthropies, Inc.; Daniel M. Soref Charitable Trust

#### \$10,000 - \$24,999

Greater Milwaukee Foundation; Madison Community Foundation; Rockwell Automation; Siebert Lutheran Foundation; Zilber Family Foundation

#### \$5,000 - \$9,999

Alliant Energy Foundation; Ascendium Education Group; Mathematics Institute of Wisconsin; Northern Trust; The Jane Bradley Pettit Foundation

#### \$1-\$4,999

American Family Insurance; Charles D. Jacobus Family Foundation; Community Foundation for the Fox Valley Region; CUNA Mutual Group; Edgewood College; Erin Frederick; Foley & Lardner LLP; Frank & Frank LLP; Prairie Springs; The Paul Fleckenstein Trust; Milwaukee Bucks; National Guardian Life Insurance Company; National Investment Services; UW Health; UnityPoing Health Meriter and Quartz; TASC

#### IN KIND DONATIONS

Alliant Energy Corporation; Ascendium Education Group; Madison Club; Madison Community Foundation

#### EVENT HOSTS

Alliant Energy Corporation; American Family Insurance Dreams Foundation; Ascendium Education Group; Bader Philanthropies; Direct Supply; Greater Green Bay Community Foundation; Greater Milwaukee Foundation; Komatsu Mining Corporation; Madison Club; Madison Community Foundation; MATC Foundation; Mathematics Institute of Wisconsin; Northwestern Mutual Foundation; Old National Bank; Oshkosh Area Community Foundation; TASC; United Way of Greater Milwaukee & Waukesha Counties; UW Health/Quartz

#### WISCONSIN LEADERSHIP DEVELOPMENT (WiLD):

Brico Fund; Greater Milwaukee Foundation; Zilber Family Foundation