

PHILANTHROPY RISING:

Responding to Pressing Challenges
& Reimagining Futures

2020

Wisconsin
Gives Report



★
WHAT
CAN WE DO
TODAY?



wisconsin
philanthropy
network

Your partner for effective giving

A Message from the President and CEO



Welcome to the 2020 Wisconsin Gives Report. Once again, Wisconsin Philanthropy Network (WPN) proudly presents this biennial, in-depth look at the culture of philanthropy in Wisconsin and throughout the United States.

While statewide philanthropy continues to be a source of great inspiration and hope, without question, 2020 has been an incredible year on many fronts. Most notably, the COVID-19 pandemic has created unprecedented challenges. In fact, so much has changed that we have a special section in this year's report to explore pressing challenges across our urban, suburban, and rural communities.

WPN's 2020 Wisconsin Gives Report explores the important role philanthropy plays in responding to challenges and reimagining futures. It provides critical information about statewide charitable giving, national trends, and sector specific analysis, which is vital to informing and advancing effective philanthropy. Within this report you will also find an analysis of survey results from Grantmakers across Wisconsin, including a timely assessment of how funders are responding to the 2020 crisis through grantmaking and other changes. Statewide and national philanthropic stakeholders have also contributed articles to deepen understanding of critical issues, including an analysis of COVID's impact on Wisconsin's nonprofit sector. In addition, data has been compiled from numerous national studies and sources. Member Spotlights, interspersed throughout this report, feature best practices from The Mathematics Institute of Wisconsin, Community Foundation for the Fox Valley Region, Rockwell Automation, the Alliant Energy Foundation and more.

Whether you are a funder committed to increasing your overall impact, a grant seeker dedicated to meeting our state's pressing needs, or someone interested in the impact of our great philanthropic community, we hope you find this information beneficial as you seek to better the lives of current and future generations.

I continue to be proud to have the opportunity to work with Wisconsin's philanthropic community, which is home to so many who are committed to creating solutions, improving lives, and ensuring our communities thrive even during the most challenging times!

Tony Shields, President and CEO

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Overall Key Findings

- ▶ Total estimated charitable giving in the U.S. rose **4.2%** between 2018 and 2019, to \$449.64 billion
- ▶ Nationally, giving by corporations increased by **13.4%** to a total of \$21.09 billion
- ▶ Nearly half of WPN survey respondents expect an increase in their grantmaking
- ▶ **64%** of WPN survey respondents who are increasing grants are directing funding to disaster philanthropy due to the COVID-19 crisis
- ▶ **39%** of WPN survey respondents will increase grants to overall operating support
- ▶ **60%** of survey respondents are directing funding to address racial justice issues, including **25%** who are increasing support for organizations led by people of color

Rising to Challenges

By early fall 2020, Wisconsin, like much of the world, has been radically changed and challenged by the COVID-19 crisis. Between January to November 1st of 2020, the coronavirus has infected more than 228,863 Wisconsinites, causing more than 2,047 deaths according to the **Wisconsin Department of Health Services**. Older adults, people with underlying health conditions, and communities of color are at a higher risk of becoming severely ill from the coronavirus. Wisconsin's rural communities are more likely to have older populations, while urban areas have higher concentrations of communities of color. More on philanthropy, public health, and health equity can be found on pages 13-14.

At its outset, people of color have been disproportionately affected by COVID-19. At the same time, incidents of police interactions with black and brown men and women have promoted mass protests across the nation. **Prior to 2020 communities across Wisconsin declared racism a public health crisis.** Today, many in philanthropy are focusing on advancing racial equity, diversity, and inclusion. See pages 15-16 for more.

Wisconsin COVID-19 Summary Statistics Cumulative data, Updated: 11/1/2020

Total People Tested: 2,080,068
Positive (Confirmed Case): 228,863
Recovered: 179,230
Hospitalized: 11,497
Deaths: 2,047

Wisconsin Department of Health Services

SPECIAL SECTION

The current public health crisis has also disrupted economies, creating financial insecurity, increased unemployment and bankruptcies across urban, suburban and rural communities. The Wisconsin Department of Revenue forecasts that Wisconsin will not return to 2019 employment levels until 2023. As economic impacts amplify existing inequities, everyone agrees that economic recovery is vital. Impact investing is one solution for philanthropy and rural philanthropy to consider.

Learn more about how impact investing can promote equitable economic recovery for communities across Wisconsin on page 17.

Education has also been upended by the virus. In the spring of 2020, students of all ages were unexpectedly thrown into virtual learning. In the 2020-21 school year, classrooms across the state reopened virtually, in person, and via hybrid with contingency plans for digital learning. However, roughly one-third of all K-12 school districts across Wisconsin report at least a quarter of their students do not have reliable internet access, according to the **Wisconsin Digital Divide and its Impacts on Learning**. This is especially problematic in Wisconsin's rural communities. Learn how the Mathematics Institute of Wisconsin is "Helping Teachers and Students Thrive in a Time of Uncertainty" on pages 10-11.

People of color have been disproportionately impacted by the COVID-19 crisis.

Wisconsin's Unemployment rate soared to 14.7% in April of 2020
-WI Dept. of Economic Advisors

Reliable internet access creates digital learning barriers for rural and urban students

"It is an honor to lead Wisconsin Philanthropy Network's Board of Directors at this moment in time when philanthropy is called to do more. Our sector must lead by example by listening to and engaging with those we are trying to help. Greater resolve, collaboration, compassion, and flexibility are more important than ever before."

-Kathryn Leverenz, Mathematics Institute of Wisconsin

2020 crises have intensified the need for services across Wisconsin communities. **211 Wisconsin**, which tracks calls for social service referrals statewide, reported that nearly 150,000 Wisconsinites called for help with housing and shelter (22.5%), health care (16.8%), mental health and addictions (15.3%), food security (13%), and more.

Nonprofits have witnessed increased demand for services, programs, and support at the same time they are facing significant financial challenges. A recent report by the Helen Bader Institute at the University of Wisconsin-Milwaukee found that Wisconsin nonprofits are experiencing significant challenges. Approximately 5% of Wisconsin non-profits have closed their doors and an additional 18% are in jeopardy. This is consistent with Candid's national estimate that nearly 22,000 nonprofits will close because of the pandemic. Wisconsin's non-profits employ approximately one in twelve of the state's workforce and are essential to the state's economy. Learn more about the COVID-19 Effect on Wisconsin's Nonprofit Sector on pages 18-19 of this report.

2-1-1 Top Service Requests- August 2020

- ▶ 22.5% Housing & Shelter
- ▶ 16.8% Health Care
- ▶ 15.3% Mental Health & Addictions
- ▶ 13% Food

SPECIAL SECTION

5% of Wisconsin nonprofits have closed & 18% more are in jeopardy because of COVID-19

United Way of Wisconsin's network raised \$11.3 million in relief funds for urban and rural counties

But there is resilience in the social sector and **philanthropy rises**. COVID-19 Emergency Funds rapidly emerged across community foundations and local United Ways throughout Wisconsin. Wisconsin Philanthropy Network's own 2020 Gives Survey from pages (5 to 6) explores how foundations across the state have responded to the crisis. Contributing articles and sector trends throughout this report also share more about philanthropy's response to the pandemic.

In the wake of 2020, philanthropy is responding by shifting resources in giving, shifting priorities to address challenges and needs, and shifting operations to provide flexibility to grantees. As you read 2020 Wisconsin Gives, we hope you will be inspired by the generosity of philanthropy across Wisconsin communities from small and large, public and private foundations, corporate giving, and individual donors. In the face of crisis, **we join together**.



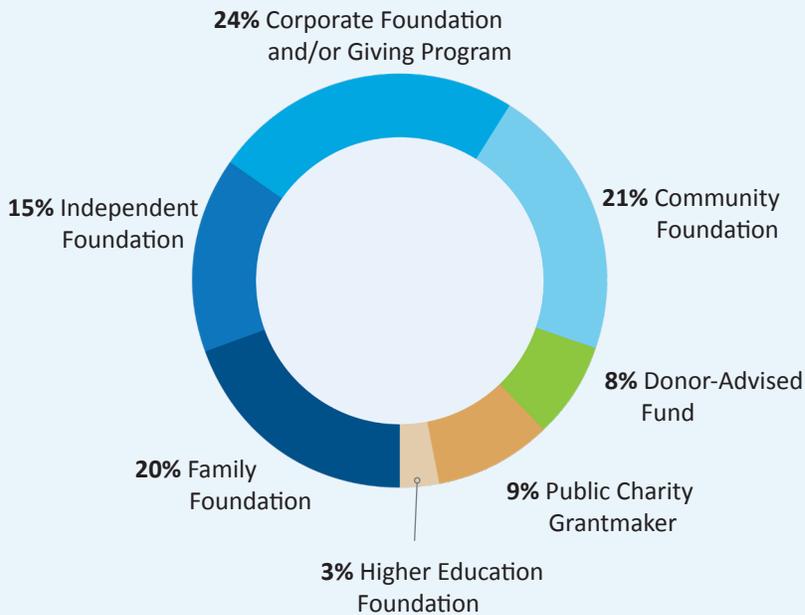
"Philanthropy is stepping up and doing more, giving more and empowering more in this period. This is an opportunity for philanthropy to respond to do the right things the right way, learn from what works and continue with the changes that make sense. This should result in closer alliances between funders and grantees as they understand one another better and relax the power dynamics."

-Survey Respondent

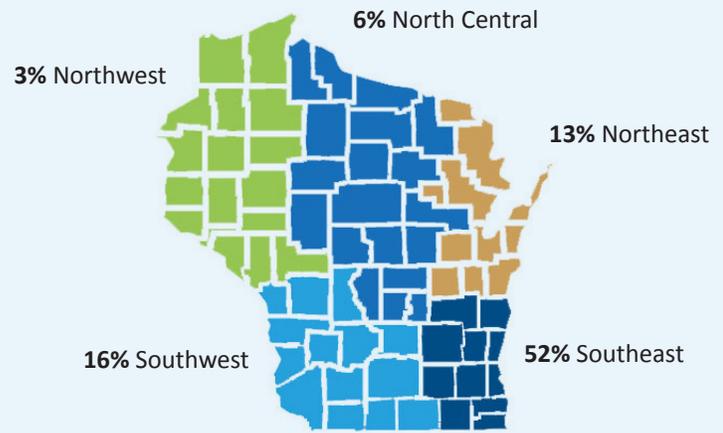
2020 WPN Statewide Grantmaker Survey Results

Respondent Demographics*

Type of Grantmaker

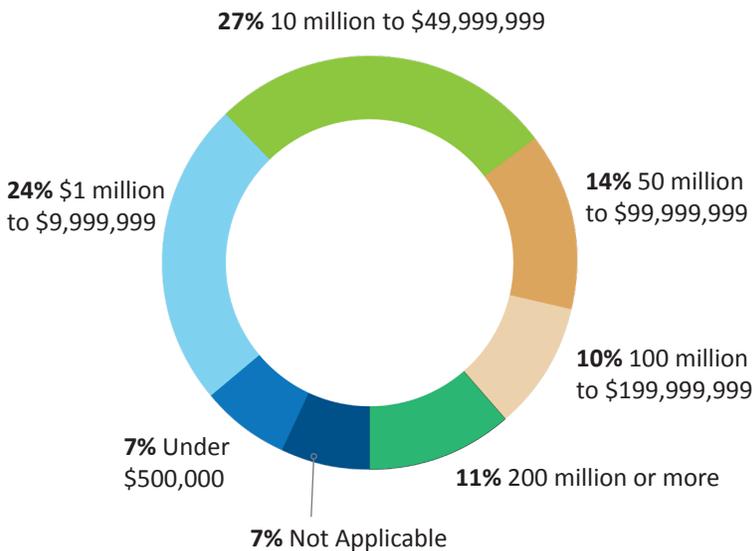


Location*

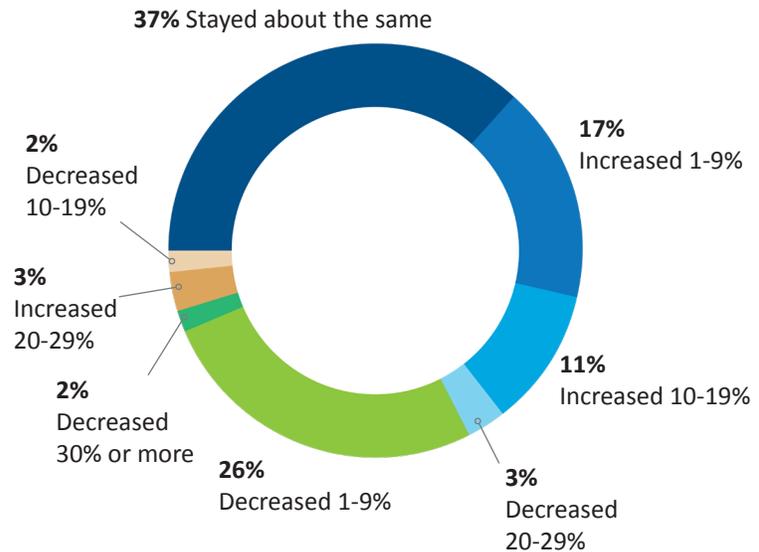


*9% of respondents indicated they were located outside of Wisconsin.

Assets



Expected Change in Assets from 2019



Reasons for Change in Assets:

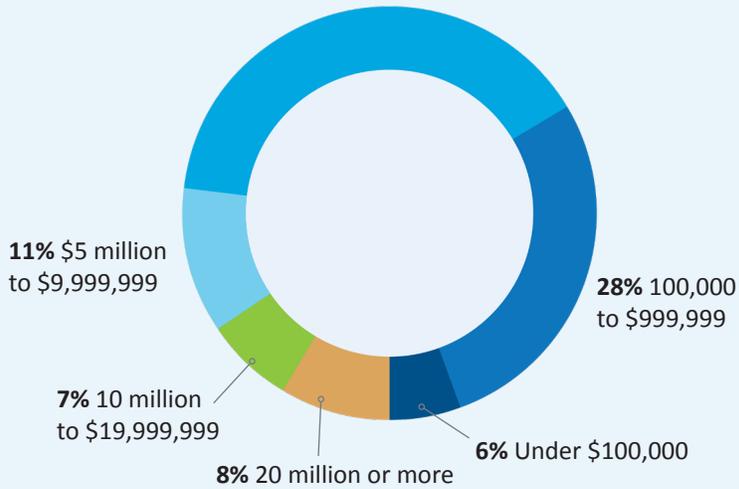
- 1) Change in markets & return on investments (60%);
- 2) No change (34%)
- 3) Change in grant payouts (12%);
- 4) Change in investment strategy (4%)

*Wisconsin Philanthropy Network surveyed approximately 365 grantmakers across Wisconsin. Results reflect a 20% response rate.

2020 WPN Statewide Grantmaker Survey Results

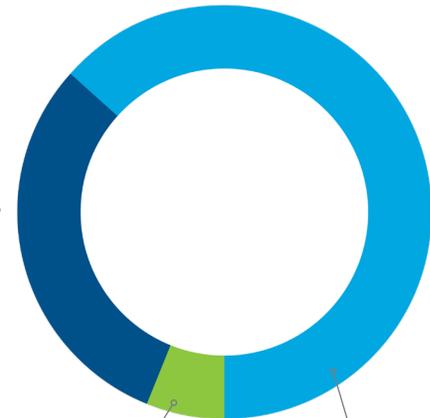
Estimated grantmaking for 2020

39% 1 million to \$4,999,999



Reason/influence for change in grantmaking

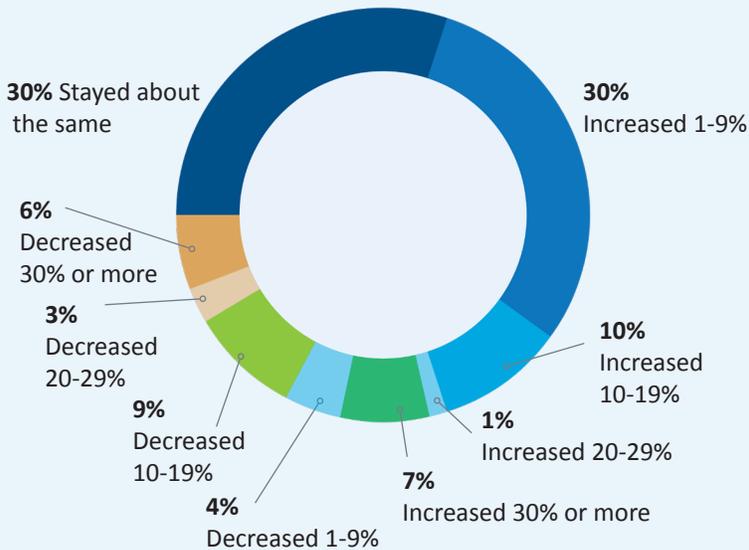
30% Increase directed to existing grantees to respond to current conditions



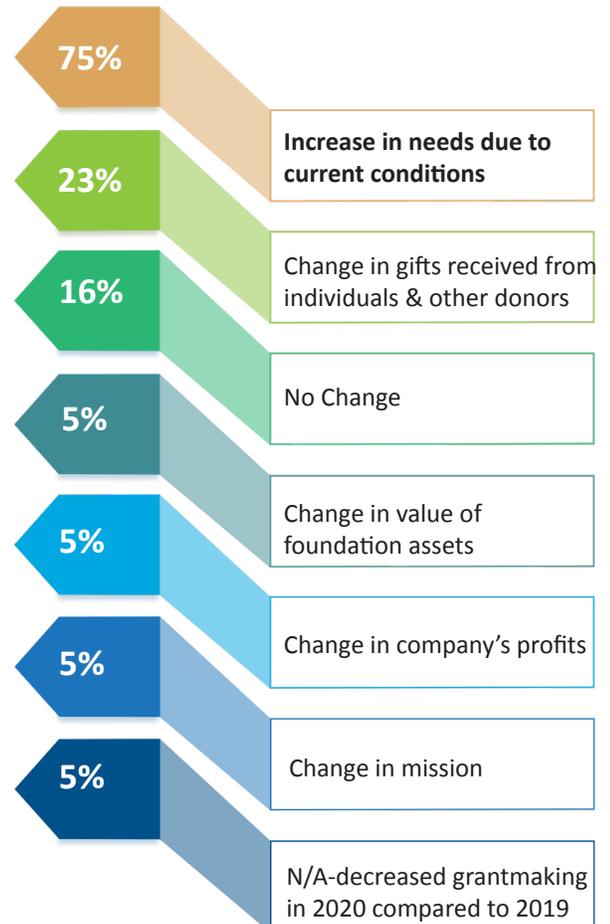
6% Increase directed to new grantees to expand grant portfolio

64% Increase directed to disaster philanthropy to respond to current conditions (e.g. COVID-19 pandemic, heightened inequities)

Estimated change in grantmaking from 2019



Reasons cited for increased grantmaking this year

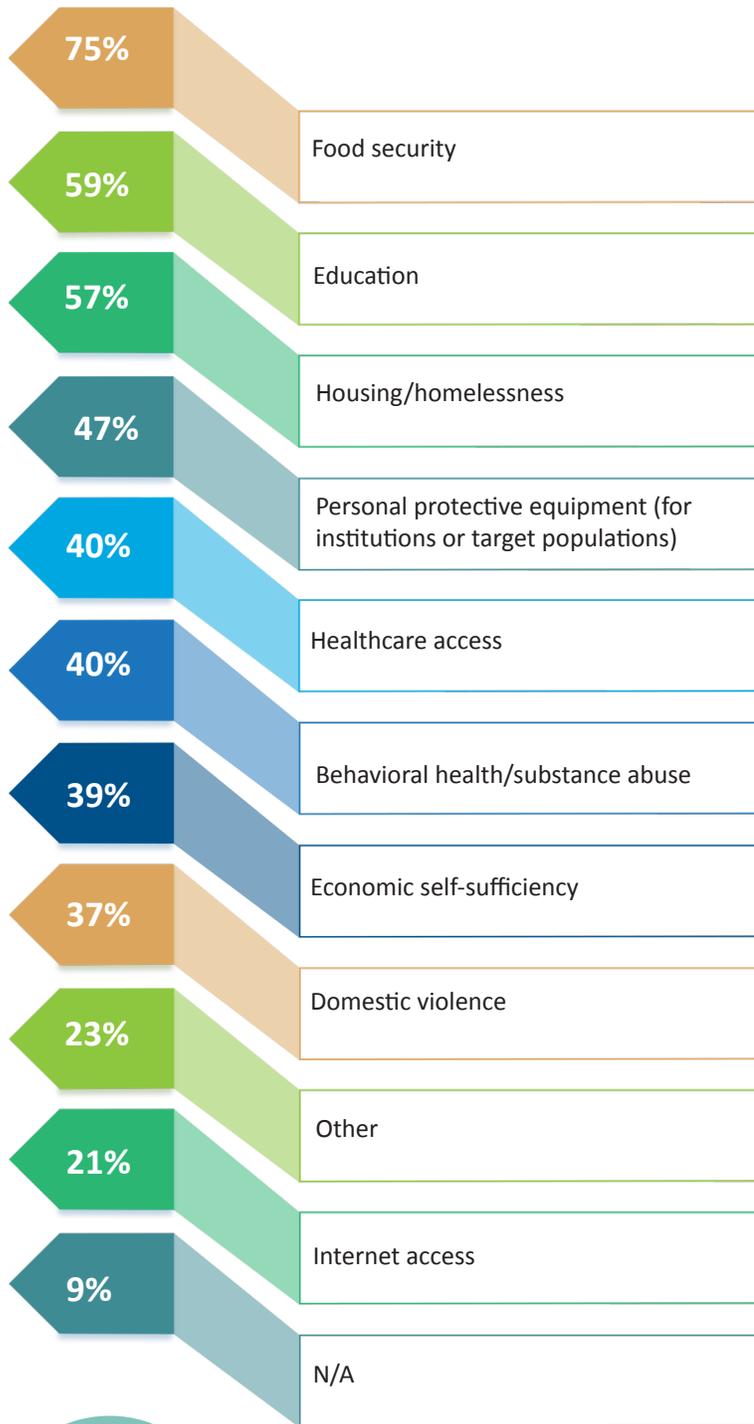


"Philanthropy will be challenged financially if current conditions result in a prolonged recession. Philanthropy's funding focus is best spent by intentionally responding, not reacting, to current conditions, while keeping a watchful eye upstream. It has been good to see donors doing the hard work of funding immediate intervention but then taking time to thoughtfully plan next steps."

-Survey Respondent

2020 WPN Statewide Grantmaker Survey Results

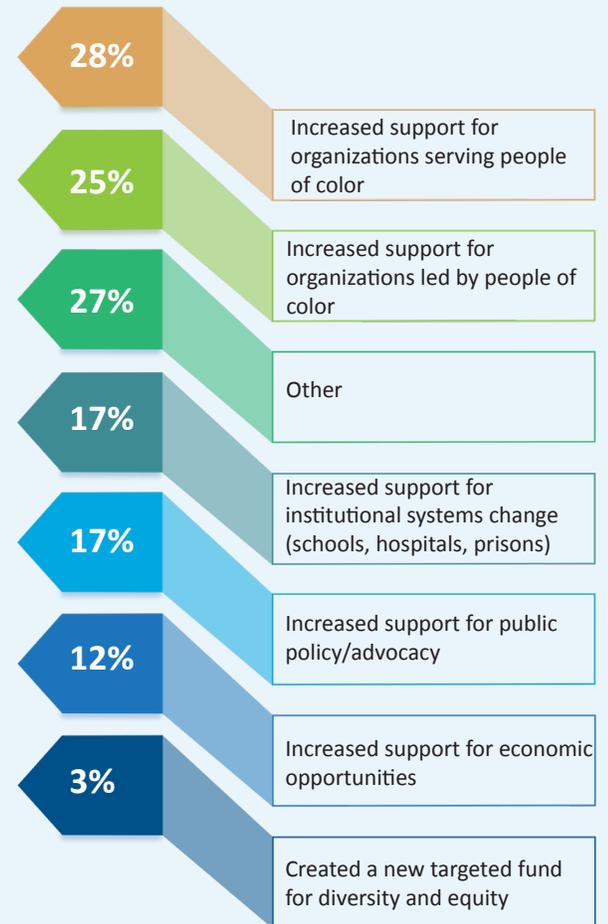
Responding to COVID-19 WPN survey respondents invested in:



"Demand for safety net services in our country will continue to grow as COVID-19 continues and more are impacted"

-Survey Respondent

Responding to racial justice WPN survey respondents invested in:



"At a time and in a state where public health funding is so limited, and when racism has been declared a public health crisis, there will be an even greater need for funders from across the state to consider how their grants can make a difference for our state."

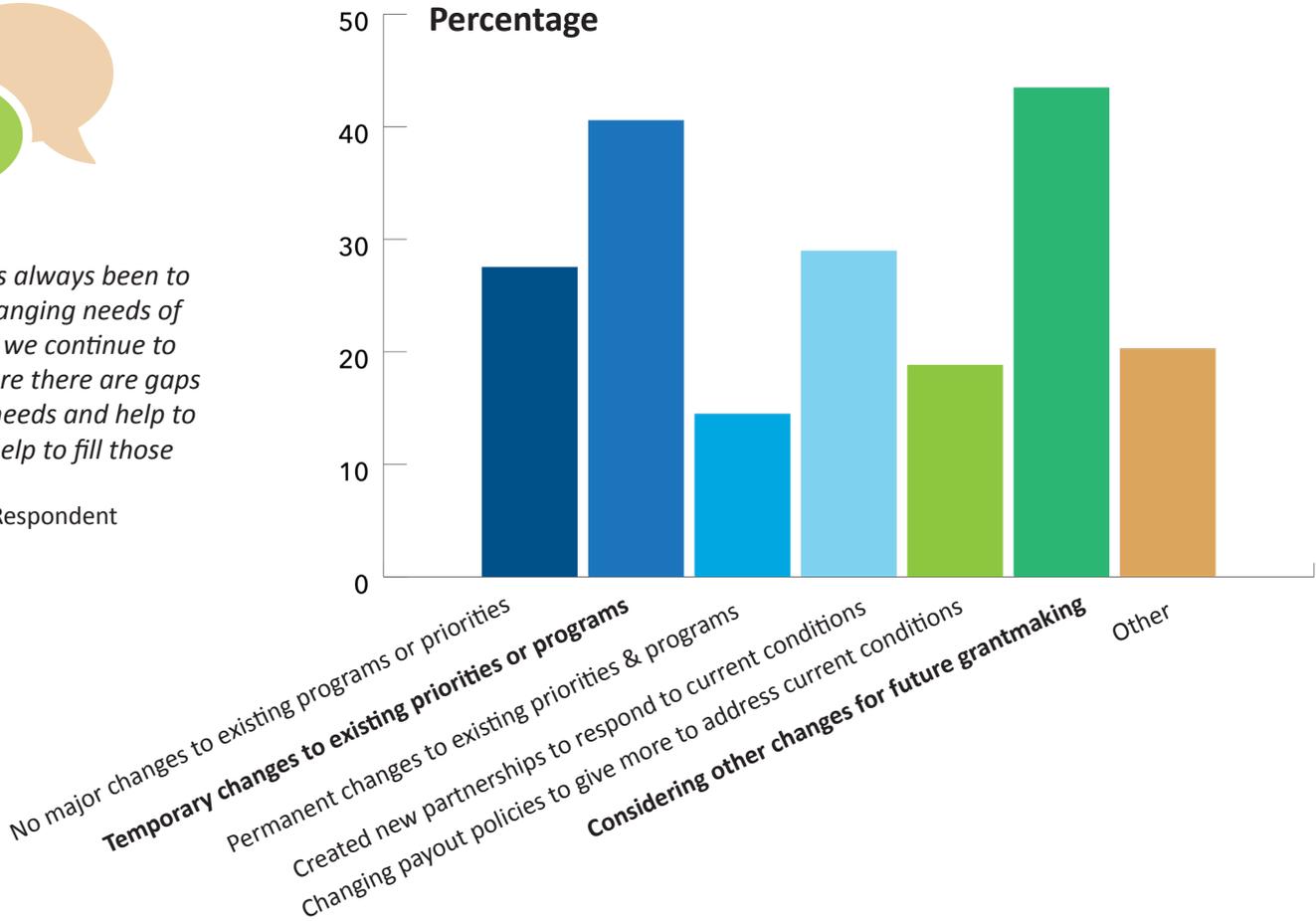
-Survey Respondent



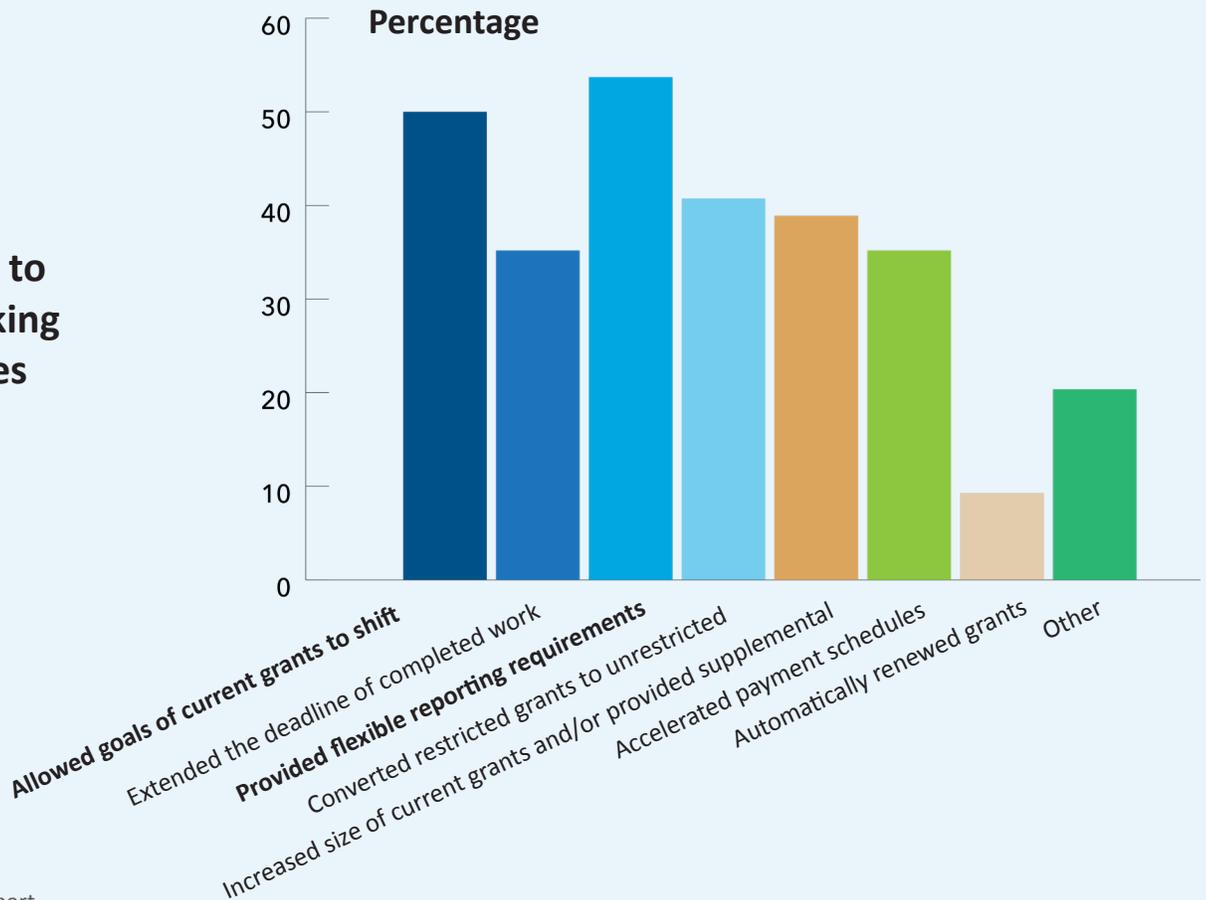
“Our approach has always been to try to meet the changing needs of our community so we continue to try to identify where there are gaps in meeting those needs and help to identify who can help to fill those gaps.”

-Survey Respondent

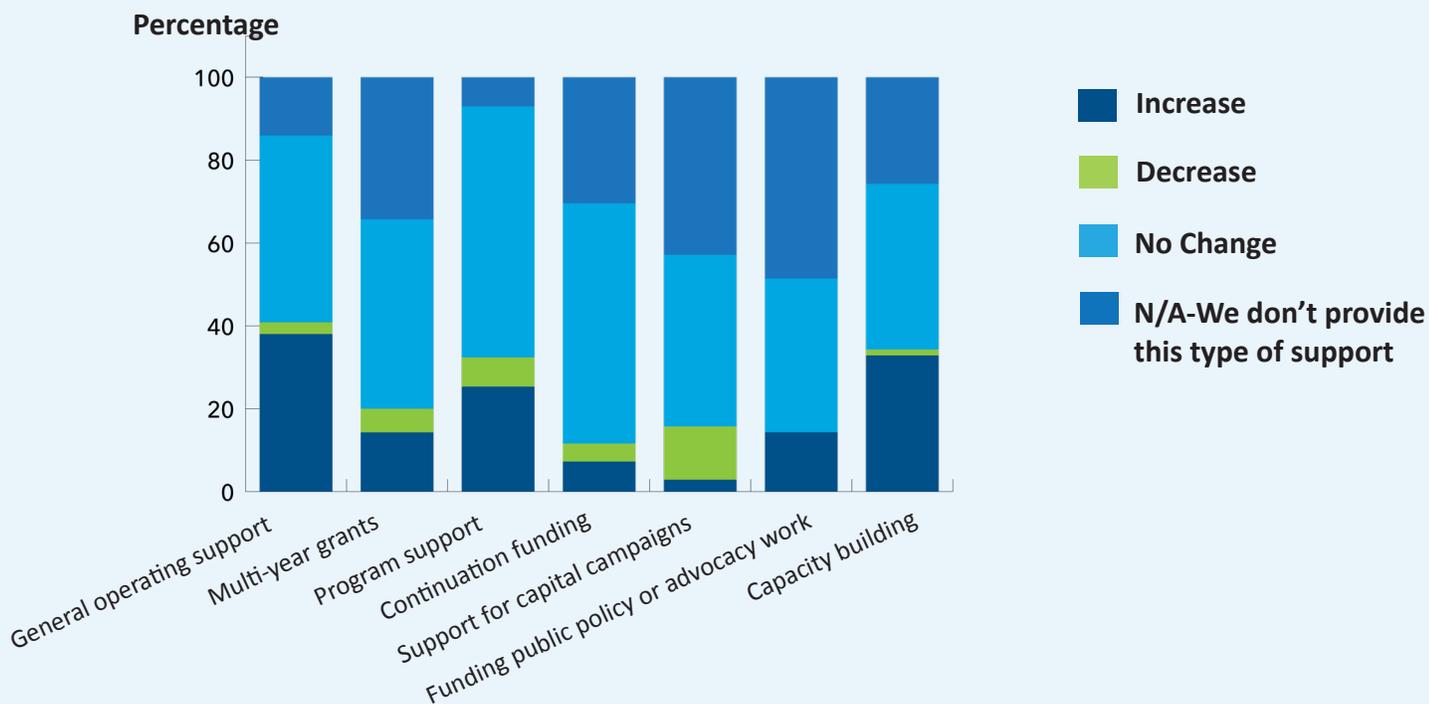
Respondents changing practices



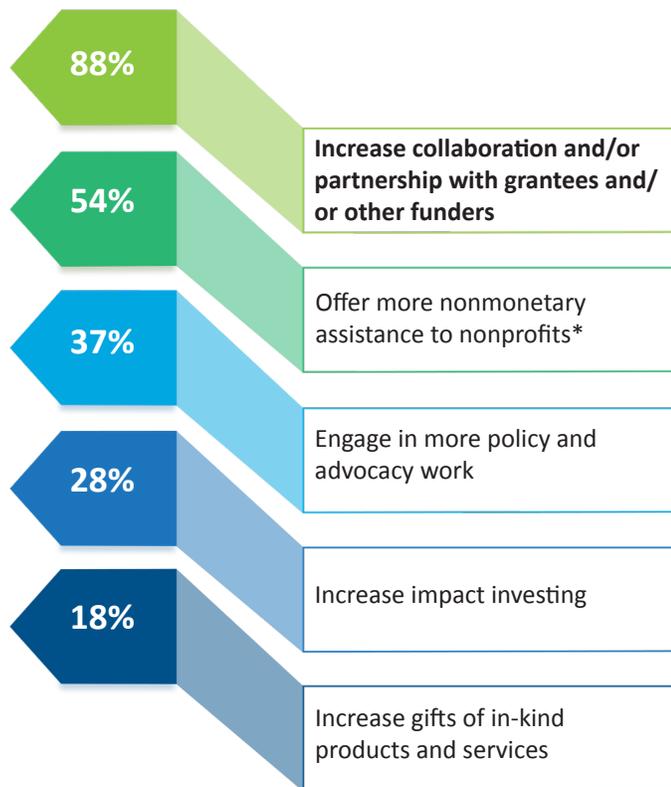
Changes to grantmaking practices



Grantmaker plans for funding by types of support



Percent of respondents considering additional changes (beyond grantmaking)

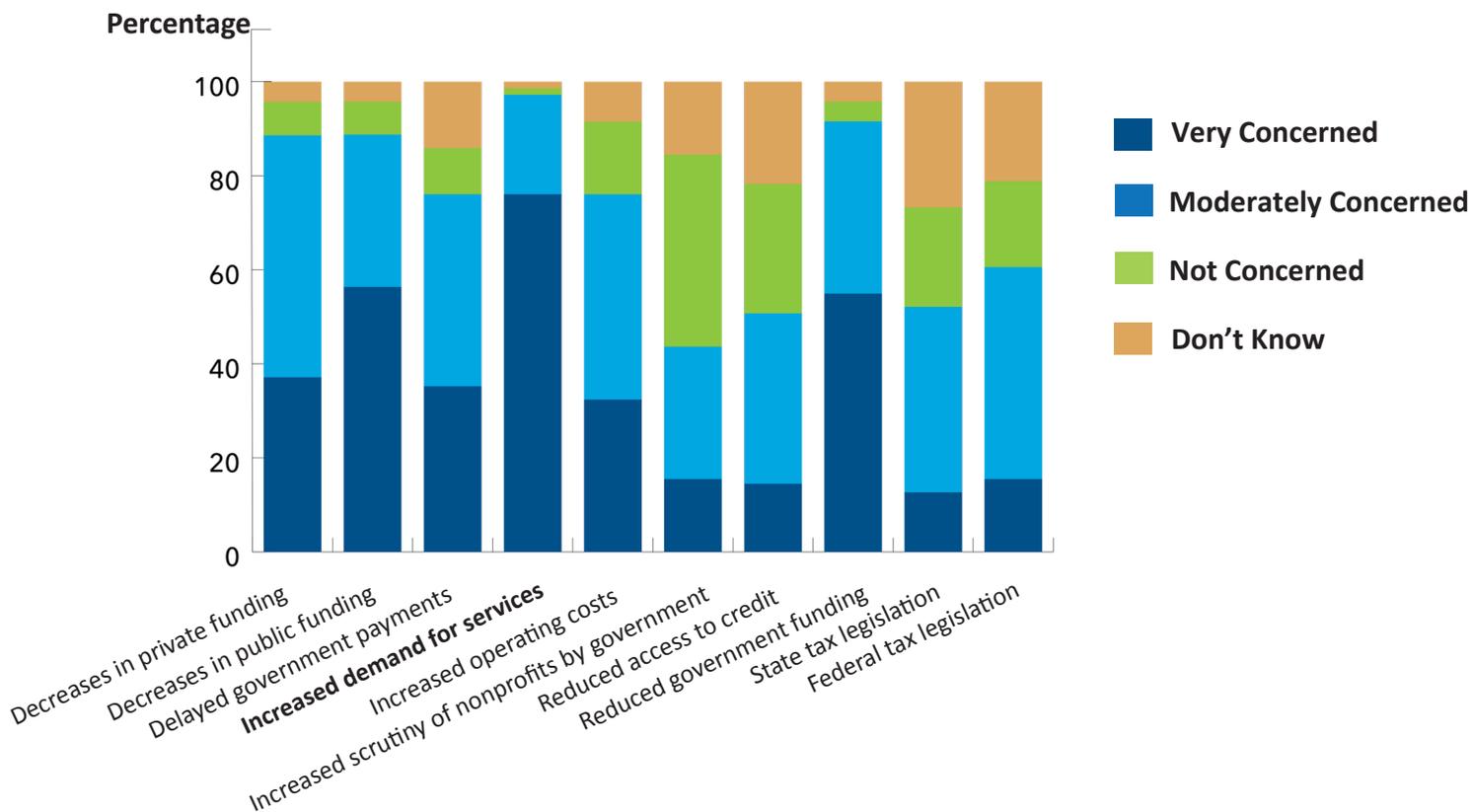


"I feel the impacts of COVID will be far reaching and with us for awhile. I'm concerned with how some of our smaller partners will bounce back if at all. Impacts to our urban groups will be different than our more rural partners. Trying to understand and figure out where all of this will land."

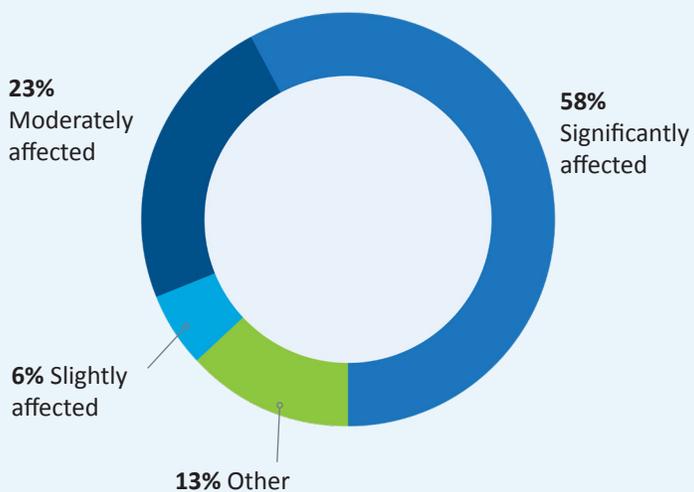
-Survey Respondent

*such as technical assistance, convenings, volunteerism, etc.

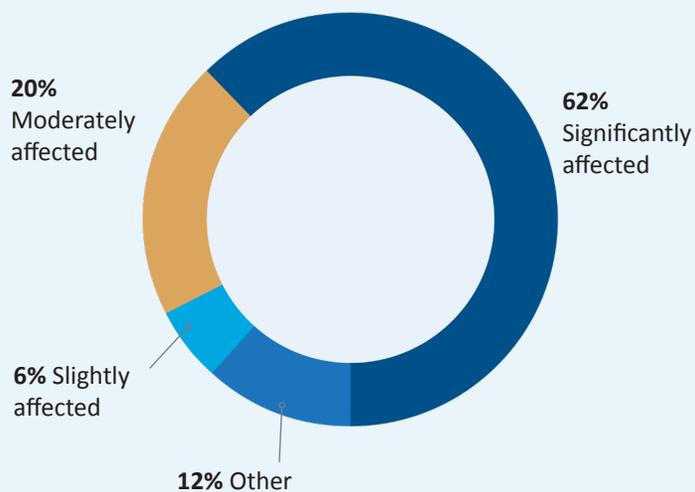
Concerns about Wisconsin's nonprofit sector



COVID-19 crises impact on grantee partners



COVID-19 crises impact on nonprofits



Helping Teachers and Students Thrive in a Time of Uncertainty

Back-to-school has always been a time of excitement for teachers, students, and their families. It's a time of promise and limitless potential as teachers prepare to support a new group of students to learn and grow, but this year was different. As districts and teachers put together plans for the 2020-21 school year they first had to determine how to start school safely amidst a pandemic. No one knew what the future would hold and many teachers were still waiting to hear what school will look like, making it difficult to plan for effective instruction. To help address these uncertainties the Mathematics Institute of Wisconsin offered new programming that supported educators to prepare for meaningful mathematics teaching and learning, whether they were teaching face-to-face or from a distance.

As a non-profit organization focused on high-quality professional development for educators, the Math Institute faced its own set of challenges in March of 2020 when all of their scheduled workshops and district trainings came to a halt as a result of the COVID-19 outbreak. With schools closed and teachers focused on moving instruction online there wasn't a need for professional learning in the traditional sense, so their team of Math Specialists decided to offer free online "Math Chats" as a way to continue to support teachers. The online sessions began in April and ran through the end of the school year, offering a space for teachers to ask questions and discuss new approaches to teaching math virtually.

Member Spotlight

Teachers participate in in-person professional development at the Mathematics Institute before the COVID-19 pandemic



Prioritizing Grade Level Learning

One of the most common concerns they heard in their chats was around unfinished learning due to the abrupt shift to virtual instruction at the end of the school year. As a result, many teachers were tempted to try to re-create or make up for learning that students may have missed; however, this would be a mistake. A study from The New Teacher Project (**TNTP**) found that giving kids remedial work actually puts them farther behind, causing greater opportunity and achievement gaps, especially for the most vulnerable students. In order to allow all learners to experience math success this school year teachers must keep grade-level learning as a top priority and focus on moving students forward, rather than looking back.

To help teachers plan for the most successful start to the fall school year, the Math Institute designed a new online summer course specifically focused on helping educators find ways to use their current instructional materials to engage students in grade-level work while incorporating “just-in-time” supports as needed. With so many unknowns going into the 2020-21 school year, giving teachers the tools they needed to make informed instructional decisions was critical to ensuring the success of all students.

Rising to New Challenges

The Math Institute is dedicated to providing the highest quality professional development for Wisconsin educators. “We know that teachers and students will continue to face new challenges this school year, but we also know that teachers are flexible, resilient and willing to face challenges head-on to do what they can to support students,” said Kathryn Leverenz, President of the Math Institute. “That’s why we continue to evolve our programming to ensure that teachers have the tools that they need to help all kids succeed in math.”

As the impacts of the pandemic on teachers, students, and families grow, the need for high-quality professional development is even greater. The Math Institute continues to explore new ways to work with educators, offering virtual coaching, new online workshops, and restructured in-district support to help ensure all students find math success whether they are in the classroom or learning from home.

Learn more about the Math Institute: <https://youtu.be/XKS20whOFz4>
mathinstitutewi.org



A classroom sits empty after schools are forced to shut down

Funding Health and Health Equity in Wisconsin

Advancing Health, Partnering for Change

Improve health for the people of Wisconsin. It's a vision that barely hints at the complex web of partners and resources needed to achieve good health. And it's the simple vision that has shaped more than 15 years of work being guided by two unique Wisconsin assets: the **Advancing a Healthier Wisconsin Endowment (AHW)** and the **Wisconsin Partnership Program (WPP)**.

Since issuing their first funding awards in 2004, AHW and WPP have together invested more than \$527 million in projects that have reached every county in the state. Awards support health research, medical education, workforce development, and investments in community partnerships addressing some of the state's most pressing health needs.

Today, both funds continue to adapt to the ever-changing and expanding needs of the state, including most recently the COVID-19 pandemic and the public health crisis of racism.

A Drive Toward Equity

Since their inception, addressing health disparities has been a cornerstone of each fund's mission. They have long viewed health as more than just a product of health care and healthy behaviors, and their work continues to evolve as they recognize the role the social determinants of health, such as social connection and the absence of racism, access to safe and affordable housing and educational opportunities, play in achieving better health outcomes.

At WPP, funding has highlighted this explicit focus on **health equity**. Recent awards are supporting initiatives led by community nonprofit organizations that are working to address issues including **Black women's wellness**, the impact of systemic racism on the health of Black communities, **disparities in health care**, criminal justice reform, and **access to safe and affordable housing**.

Rising to Meet a Pandemic

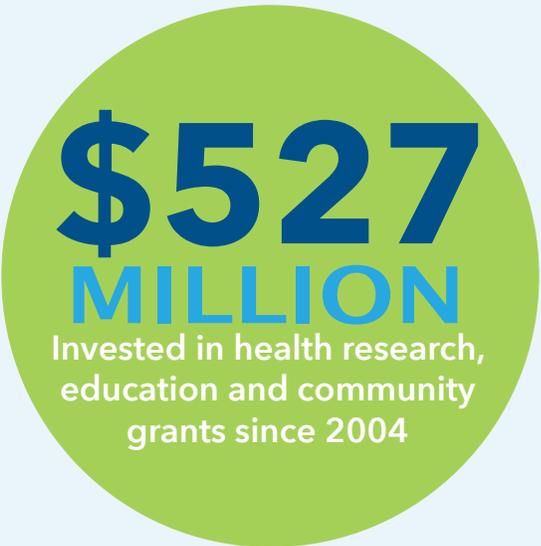
As COVID-19 arrived in Wisconsin, AHW and **WPP** responded, rapidly adapting their grant programs to address critical and urgent needs statewide.

At AHW, **17 rapid-response investments** supported early, immediate needs – assisting **Wisconsin's Hmong communities** in rapidly deploying culturally appropriate messaging, partnering with **Wisconsin's tribal communities** to address their most pressing needs, and bringing **protective equipment to nursing homes** statewide – while also supporting organizations to reach high-risk and highly impacted populations and advance innovative technology, data, and research into prevention and treatment.

Forward into the Future

Today, the funders continue to work in tandem to advance scientific knowledge and medical education, and address the root causes of poor health outcomes. Yet the core of both AHW and WPP's daily work remains focused on their responsibility to steward their funds for the people of Wisconsin. It is with that unwavering commitment, and the dedication of many partners, that both AHW and WPP continue to work toward their shared mission to achieve health and well-being for everyone statewide.

Learn more at ahwendowment.org and med.wisc.edu/partnership



\$527
MILLION

Invested in health research,
education and community
grants since 2004



Investments
focus
on
health equity



72

Wisconsin counties
reached through
grant awards

Six Data-Driven Approaches to Achieving Health Equity

Eileen Salinsky | Grantmakers in Health

- 1 Engage community members at every stage of research and evaluation efforts.
- 2 Recognize that meaningful community engagement requires commitment, flexibility, and dedicated funding.
- 3 Support researchers who come from communities of color and build a pipeline for developing young talent.
- 4 Invest in data collection policies and practices that both ensure visibility of small communities and yield timely disaggregated data on distinct groups within major racial and ethnic categories.
- 5 Utilize a positive, asset-based approach to analyze health equity issues.
- 6 Integrate an equity frame in routine data collection, analytic, and decision-making activities.

To learn more, visit the GIH Bulletin Issue Focus [article](#)

2020 Disaster Philanthropy & COVID-19

Regine A. Webster | Center for Disaster Philanthropy

2020's pandemic and disasters are clearly the focus around the world today. The Center for Disaster Philanthropy (CDP) in partnership with **Candid**, formerly the Foundation Center and Guidestar, began tracking **philanthropy and COVID-19 in the first half of 2020**. To date we have learned:

- ▶ Corporations accounted for nearly two-thirds of COVID-19 funding to date.
- ▶ Community foundations awarded more grants than any other grantmaker type (47 percent of total awards) to respond to the 2020 pandemic.
- ▶ Gifts by high-net-worth individuals accounted for at least \$1.6 billion.
- ▶ Donors donated a combined \$452.9 million through the donor-advised funds of Fidelity Charitable, Schwab Charitable and Vanguard Charitable.
- ▶ Proportionately little institutional funding was explicitly designated for specific populations, including communities of color and other vulnerable populations.

More than
\$11.9 billion was
awarded for
COVID-19 globally
over six
months

For the latest on disaster philanthropy, from floods to fires and COVID-19 giving, please visit **[The Center for Disaster Philanthropy](#)**.



"We have seen incredible generosity since the outbreak of the pandemic. Yet, we in the philanthropic community must push ourselves to give more and give smarter before, during and after a disaster. The economic, social and health impacts of the pandemic will outpace every donated dollar unless we support the most vulnerable among us."

- Regine A. Webster, Center for Disaster Philanthropy

The Emerging Roles of Philanthropy

David Biemesderfer | United Philanthropy Forum

In 2020, philanthropy has faced a leadership challenge unlike any that I have witnessed in my 25 years in the sector. Our country continues to reel from the devastating health and economic impacts of the COVID-19 pandemic, which is hitting hard in historically marginalized Black, Indigenous and People of Color (BIPOC) communities. The recent shootings and murders of George Floyd and other Black people at the hands of police, including Jacob Blake in Kenosha, have catalyzed sustained demands for racial and social justice. This critical moment has renewed calls for philanthropy to make serious and permanent changes to how it does its work.

Foundations are being challenged to change their grantmaking practices in many ways: move from restricted to unrestricted grants; move to more multi-year funding; seriously streamline grant application and reporting processes and requirements; support more policy and advocacy work and engage in that work themselves; and generally treat their grantees more like true partners in the work. There are also growing calls for grantmakers to invest more deeply in nonprofit organizations led by the BIPOC communities they are serving, acknowledging that these groups know best what their communities need, and to invest more in efforts to advance racial equity in America.



It remains an open question how broad-based and long-lasting these changes will be. But my hope is that philanthropy leaders will continue to see the intertwining public health, economic and social justice challenges we have faced as an opportunity to rethink how they can best use their philanthropic assets over the longer term to better address the historic systemic inequities in our country.



United Philanthropy Forum’s nearly 90 regional and national philanthropy-serving organization (PSO) members—including Wisconsin Philanthropy Network—represent more than 7,000 funders across the country. We continue to be at the heart of leading philanthropy to rethink our field in response to the unprecedented challenges we’ve faced in 2020. We are committed to ensuring that our organization and our PSO network will do all that we can to ensure that U.S. philanthropy rises to the challenges we’ve faced in 2020, and that out of our nation’s current trauma and crisis will come a brighter future.



The Opportunity Index 2017 vs 2019

The **Opportunity Index** provides a snapshot of what **opportunity** looks like at the state and national levels, based on economic, education, community health and civic conditions. The 2019 **Opportunity Index** provides **Opportunity Scores** for all 50 U.S. States and the District of Columbia.

The chart below compares 2017 to 2019. While the crises have changed conditions, it's important to see prior data as a baseline.

	Wisconsin (2017)	Wisconsin (2019)	National (2017)	National (2019)
State Rank	10	12	----	----
Population	5,767,891	5,792,051	320,896,618	323,071,618
Economy				
Unemployment Rate	3%	3%	4.1%	3.3%
Median Household Income	\$51,743	\$52,782	\$51,871	\$52,431
Poverty (% of population below poverty line)	12.1%	11.3%	14.7%	13.4%
Education				
On-Time High School Graduation (% of freshmen graduating in four years)	86.5%	87.1%	83.7%	84.8%
Community Health & Civic Life				
Violent Crime (per 100,000 population)	305.8	319.9	372.6	382.9
Youth Not in School & Not Working (% ages 16-24)	8.8%	8.9%	12.3%	11.5%

Foundations Supporting Equity

Foundations are investing in equity, increasingly adding an equity lens to grantmaking practices, and/or rethinking strategies to support equity more intentionally.

In 2019, Borealis Philanthropy launched the **Racial Equity to Accelerate Change Fund** to help nonprofit organizations update their internal practices to address racial equity in their institutions. The (REP) Fund awarded \$1.5 million in grants to 17 philanthropy serving organizations to accelerate practices to promote equity.

Giving USA 2019 shares the example of the Native American Agricultural Fund, which made a \$10 million commitment to 80 projects. NAAF is a Native-led organization that is specifically focused on Native communities. Funded initiatives include an economic development project to aid farming in rural South Dakota and assistance for entrepreneurship and business start-ups.

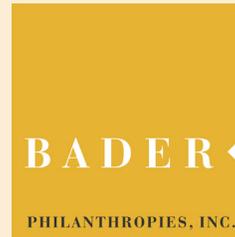
Giving USA: The Annual Report on Philanthropy for the Year 2019 (2020). Chicago: Giving USA Foundation

Bader Philanthropies, moved to Harambee, a historic Milwaukee neighborhood in 2018. The global state-of-art facility builds on a multi-decade commitment to meaningful connections and hopes to manifest the Harambee neighborhood's Swahili translation, "all pull together."

The Foundation deepened its commitment to bringing people of diverse perspectives together around issues of social concern – healthy aging, housing, trauma informed care, economic vitality and many more. Convenings were organized by the Foundation and nonprofit partners who are thought leaders with vast networks. More than 5,000 people - representing over 532 organizations - attended 198 events in the state-of-the-art global headquarters in its first year in the neighborhood.

Member Spotlight

In the spirit of being a good neighbor, Bader Philanthropies supported and participated in several neighborhood-based initiatives from the Juneteenth Day celebration to Milwaukee Habitat for Humanity's 1st Rock the Block in the Harambee neighborhood on Vel Phillips Avenue, between Vienna and Keefe Avenues. Last summer, the Foundation hosted "BBQ with Bader," which was attended by more than 300 people. It was converted into a festive "Take-Away" BBQ in light of the COVID-19 pandemic.



Impact Investing: A Tool for Equitable Economic Recovery

Salli Martyniak, Principal | Community Matters, LLC

COVID-19 hit us hard and deep. It exposed disparities and inequities in our healthcare system and left unprecedented economic devastation in its wake, the full effects of which are still unfolding. In response, **Wisconsin Economic Development Corporation (WEDC)** recently released a report, **Wisconsin Tomorrow – An Economy for All**, that outlines some of the state’s immediate concerns – including getting people back to work, fixing broadband and supporting innovation. Working in collaboration with other partners, strategic impact investing is the right response at the right time to help support an economic recovery.



Yet, before using it, we must understand it. Is it philanthropy? Investing? A little bit of both? For the sake of this audience, the latter offers the best nuanced perspective of impact investing. It’s about financially supporting a specific social outcome while generating an ROI for the investor and, at the same time, improving the overall assets of a community.

Bottom line, impact investing is fluid. There is not a one size fits all model; instead, with a little bit of openness, an interest in creating deeper social impact that is in alignment with personal/organizational values and a touch of creativity, impact investing can and should be integrated into any portfolio. Across Wisconsin and nationally, impact investing has effectively supported economic development activities in various communities with a multitude of results.

Impact Investing Examples

Investment Strategy	Local	National
Place-Based	With the help of local investors and foundations, Sherman Phoenix , https://www.shermanphoenix.com/ , a small business incubator, literally rose from the ashes following a fatal police shooting that rocked the neighborhood.	The Humboldt Area Foundation’s participation in an innovative loan agreement helped develop and build the Eureka Health & Wellness Center in rural CA, https://opendoorhealth.com/locations/eureka-community-health-center/ .
Sector-Focused	Community Investment Program (CIP) , https://www.wichurches.org/category/projects/ , managed by the Wisconsin Council of Churches invites church members and congregations to invest in the CIP which then invests monies into WI community development financial institutions (CDFIs).	CNote , https://www.mycnote.com/ , is a nationwide technology platform that allows investors of all types to easily deploy capital across a diverse pool of CDFIs.
Geographic Alignment	FundMilwaukee , https://fundmilwaukee.com/ , gives individual investors an opportunity to directly invest in locally-owned businesses.	Western New York Impact Investment Fund , https://wnyimpact.com/about is a collaborative for-profit, cross-sector investment fund with pooled capital designed to invest in the resurgence of western NY.
Mission-Focused	Forward Community Investments , https://www.forward-ci.org/ , purchased a building for One City Schools , http://www.onecityschools.org/ , to preserve quality daycare in an underserved community.	Slow Money , https://slowmoney.org/ , is a national investment movement that catalyzes the flow of capital to local food systems and connects investors to their locales.

Connect with the Wisconsin Impact Investing Collaborative or one of its members today!
<https://www.wi3c.org/>

The COVID-19 Effect on Wisconsin's Nonprofit Sector

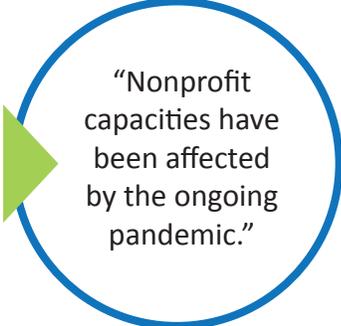
Bryce Lord | Helen Bader Institute for Nonprofit Management at the University of Wisconsin - Milwaukee



The Helen Bader Institute for Nonprofit Management at the University of Wisconsin – Milwaukee, joined by affiliated faculty throughout the state, is currently conducting a year-long study of the challenges facing Wisconsin nonprofits impacted by the COVID-19 crisis. The study has focused on a series of nonprofit capacities potentially affected by the ongoing pandemic, including:

- ▶ Effect on Programs & Service Delivery
- ▶ Human Resources, including staffing and payroll
- ▶ Finance & Revenue, including access to federal stimulus funding

What we've uncovered is a sobering reality check into the brittle infrastructure supporting Wisconsin's nonprofit sector. But it has also been an enlightening, encouraging peek into the creativity, strength, and resiliency of this vital workforce.



“Nonprofit capacities have been affected by the ongoing pandemic.”

Findings: Spring

Polled during April 2020, nonprofit leaders presented a story of uncertainty and abundant caution. As you might expect, many Wisconsin nonprofits were experiencing increased demands for food, shelter, and other necessities, yet were wholly cut off from responding due to school closures, stay at home orders, and social distancing. Nonprofit leaders reported a variety of management and capacity needs:

- ▶ Disruption of fundraising and revenue-generating activities; related budget adjustments and overall financial sustainability concerns
- ▶ Need for flexibility from funders
- ▶ Need for technology support and resources to be able to deliver virtual programming and reach constituents equitably
- ▶ Concerns over how to create a safe work environment for staff, volunteers and clients that promoted engagement and safety

Findings: Summer

By this summer, nonprofit leaders are generally far more confident in providing services for their clients and making payroll for the next quarter.

Over 91% of nonprofits have implemented a moderate to significant degree of CDC-approved procedures for re-engagement. There is more confidence in the navigation of social distancing as a part of their community connection and the integration of safety measures in staff support and program delivery.

However, in spite of this overall uptick in security, over 5% of Wisconsin nonprofits have been forced to cease operations. An additional 18% are offering services in such a severely reduced capacity; closure may not be far off. 65% of Wisconsin nonprofits applied for and received Payroll Protection Program funding, and 12% received federal Small Business loans. However, a significant number of nonprofit leaders felt that they were ineligible for any form of federal support and didn't apply.

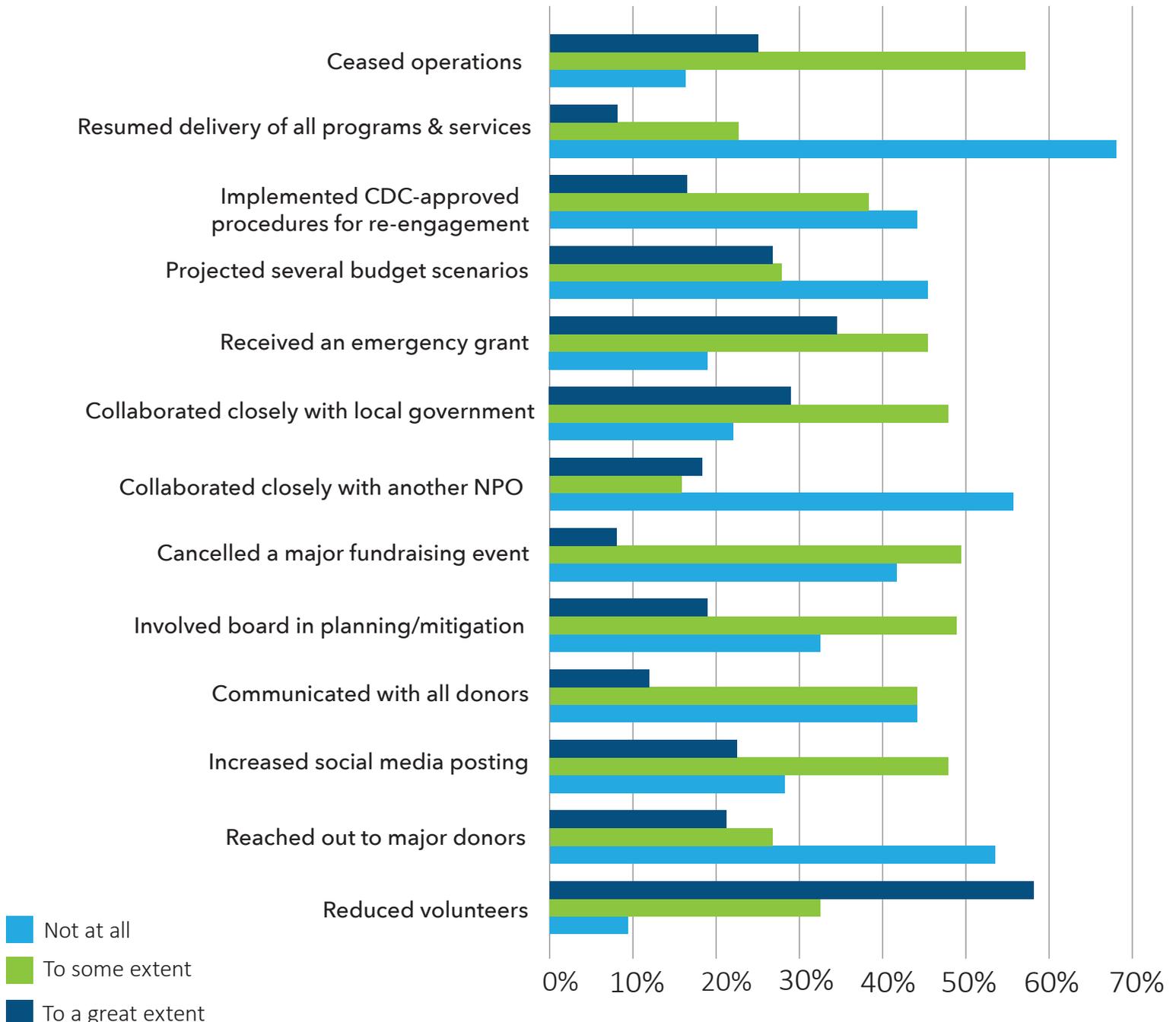
Wisconsin Nonprofits Responding to Challenges

One thing still holds steady as a primary concern sector wide. The disruption of an entire fiscal quarter of revenue (both philanthropic and program-derived) has had a devastating effect on future budgetary stability as nonprofit leaders look to plan beyond the immediate future. To say nothing of the uncertainty of how financial support will look in the future.

Three-quarters of the nonprofits surveyed indicated having received some form of an emergency grant and recognize the responsiveness of the philanthropic sector. However, there is still significant concern over how to communicate their immediate needs to government and philanthropic leaders. There have been numerous indications of early fears of the unknown, followed by a growing degree of stability as nonprofit leaders utilize creativity and adaptability to survive. But it is clear that a return to “normal” is still very far off, and the nonprofit sector is far from immune to the economic challenges brought about by quarantine and isolation.

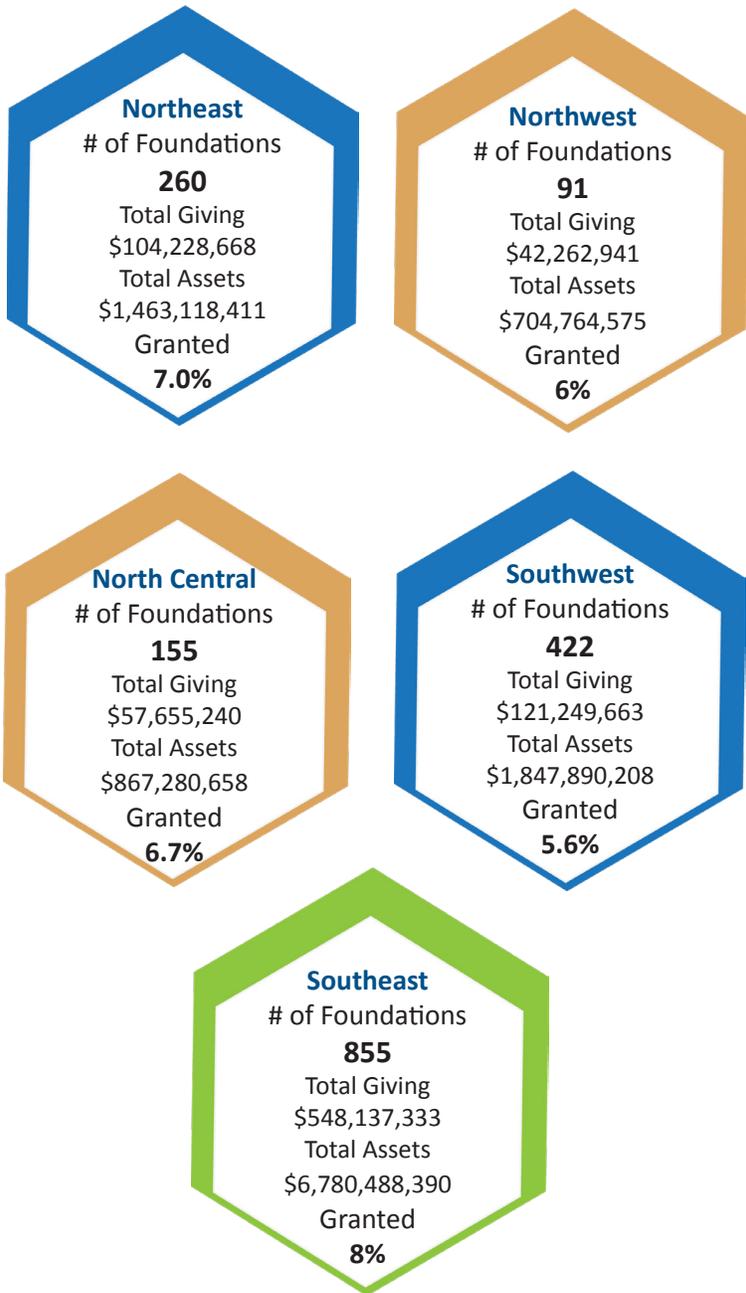
Wisconsin Nonprofits Respond:

Which of the following, if any, has your organization already undertaken in response to the COVID-19 pandemic?



Wisconsin Giving Statistics

Foundation Giving by Region



Total Foundations in Wisconsin: 1,783

Total Assets	\$11,663,542,242
Total Giving	\$873,533,845
Percent Granted	\$7.49%

Foundation Information Center, 2020

Nonprofit Statistics

Economic Impact

Wisconsin nonprofit employment accounts for **11.9%** of the states total workforce
20th in the nation

Total annual wages
\$14.6 billion

Average annual wages per employee: **\$50,243**

Average weekly wages per employee: **\$966**

Bureau of Labor Statistics, Nonprofit Establishment Employment and Wage Estimates, 2016

Number of Wisconsin Nonprofit Organizations

▶ 501(c)(3) Public Charities	36,397
▶ **Other 501(c)(3) nonprofit organizations	17,465
▶ *501(c)(3) Private Foundations	4,191

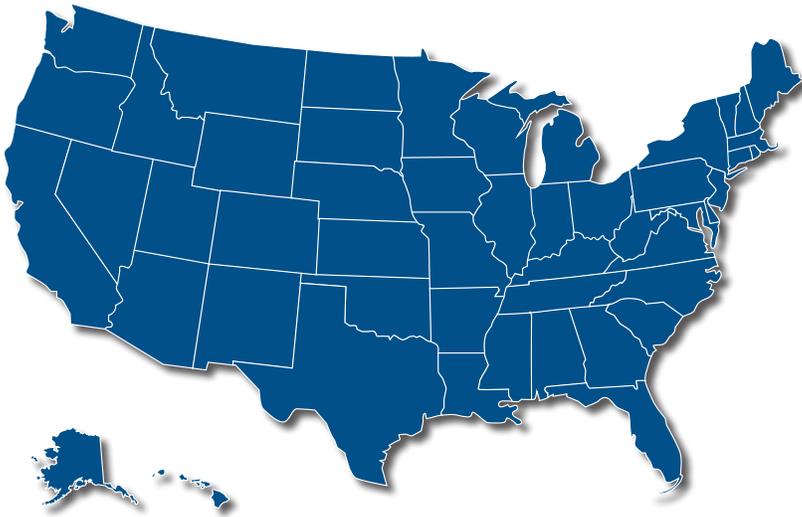
*Operating & non-operating

** Civic leagues, chambers of commerce, veterans organizations, etc.

Guidestar 2020

National Giving Trends

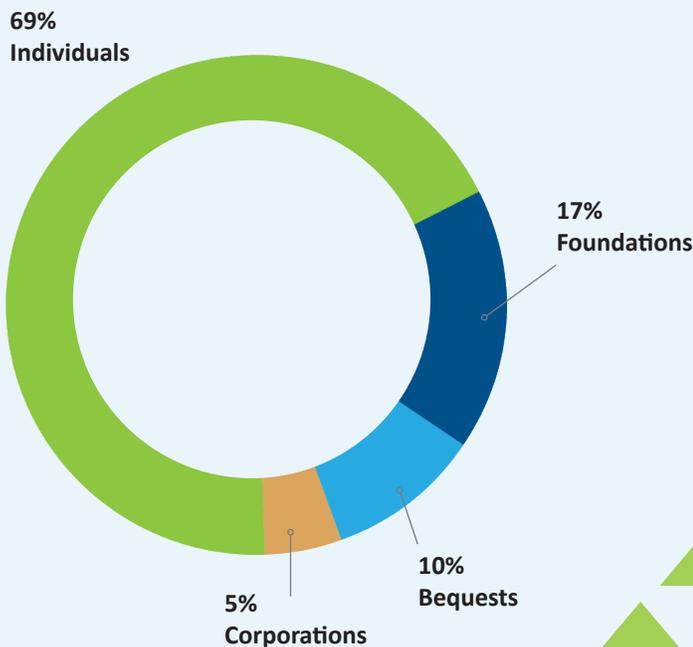
Total estimated charitable giving in the United States rose 4.2 percent between 2018 and 2019 (2.4 percent, adjusted for inflation), to \$449.64 billion in contributions. This increase reflects flat or positive growth in giving to eight of the nine major recipient sub-sectors in inflation-adjusted dollars.



Giving by foundations increased **2.5 percent**, to an estimated **\$75.69 billion in 2019** (a flat growth rate of 0.7 percent, adjusted for inflation).

Giving USA: The Annual Report on Philanthropy for the Year 2019 (2020). Chicago: Giving USA Foundation

Sources of 2018-2019 Contributions (in billions)



Percent Increase in Giving by Source from 2018-2019



Giving by Individuals
\$309.66 billion



Giving by Foundations
\$75.69 billion



Giving by Bequests
\$43.21 billion

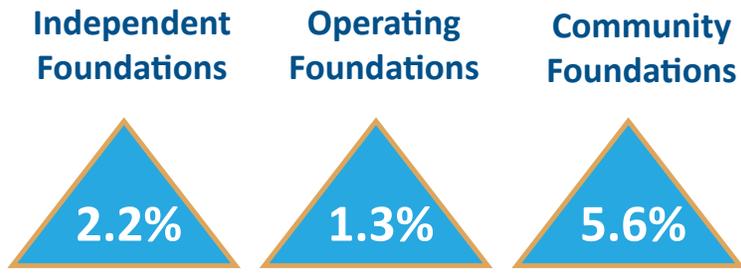


Giving by Corporations
\$21.09 billion

Giving USA: The Annual Report on Philanthropy for the Year 2019 (2020). Chicago: Giving USA Foundation

National Giving Trends

Giving by all three types of foundations included in the estimate for 2019:



Giving USA: The Annual Report on Philanthropy for the Year 2019 (2020). Chicago: Giving USA Foundation

2019 Foundation Source Annual Report

General Operating Support vs Specific Purpose Grants all Foundations

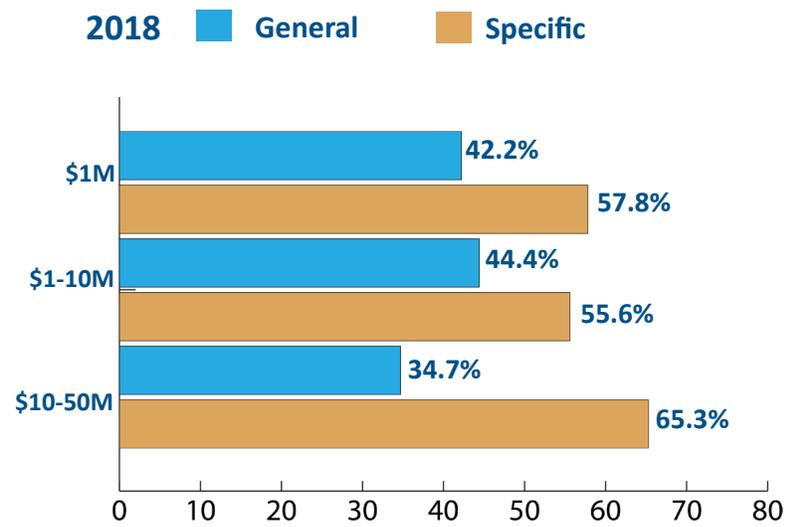
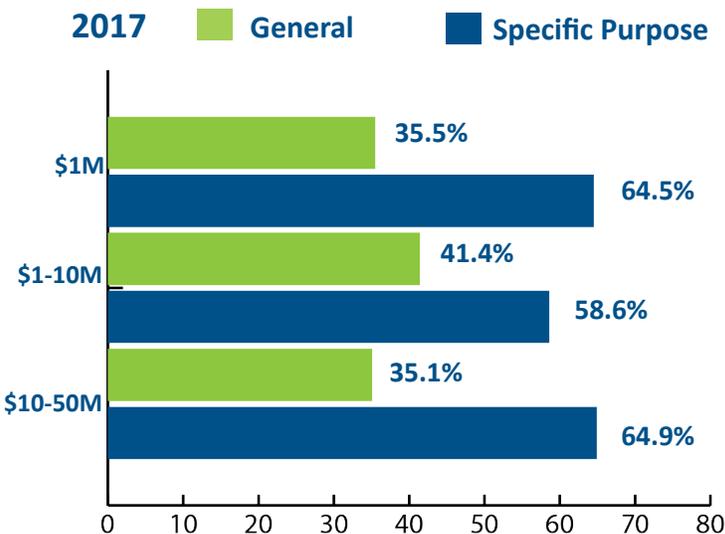


Private distribution rates of private foundations by endowment size in 2017 & 2018

*Data: 2019 Annual Report on Private Foundations, Foundation Source, 2019, <https://foundationsource.com/resources/library/2019-annual-report-on-private-foundations/>

Endowment Size	Average Distribution Rate	
	2017	2018
Less than \$1 million	16.5 %	14.2%
\$1 million-\$10 million	9.10 %	8.8%
\$10 million-\$50 million	7.4 %	5.9%

General Operating Support vs Specific Purpose by Foundation Size



National Giving Trends

12.6%

Giving to arts, culture, and humanities is estimated to have increased 12.6 percent between 2018 and 2019, to \$21.64 billion. Adjusted for inflation, giving to the arts, culture, and humanities sub-sector increased 10.6 percent.

5.0%

Giving to human services increased by an estimated 5.0 percent in 2019, totaling \$55.99 billion. Adjusted for inflation, giving to human services organizations increased by 3.1 percent.

13.1%

Giving to public-society benefit organizations increased an estimated 13.1 percent between 2018 and 2019, to \$37.16 billion. Adjusted for inflation, giving to public-society benefit organizations grew 11.1 percent.

.04%

Giving to international affairs is estimated to be \$28.89 billion in 2019, staying relatively flat to 2018 with a decline of 0.4 percent. Adjusted for inflation, giving to international affairs organizations declined 2.2 percent.

Giving Summary

RISING



2.3%

Giving to religion increased 2.3 percent between 2018 and 2019, with an estimated \$128.17 billion in contributions. Inflation-adjusted giving to the religion sub-sector stayed relatively flat with growth of 0.5 percent in 2019.

6.8%

Giving to health is estimated to have increased by 6.8 percent between 2018 and 2019 (an increase of 4.9 percent, adjusted for inflation), to \$41.46 billion.

2.2%

Giving to individuals is estimated to have grown 2.2 percent (0.4 percent in inflation-adjusted dollars) between 2018 and 2019, to \$10.11 billion. The bulk of these donations are in-kind gifts of medications to patients in need, made through the patient assistance programs of pharmaceutical companies' operating foundations.

12.1%

Giving to education is estimated to have increased 12.1 percent between 2018 and 2019, to \$64.11 billion. Adjusted for inflation, giving to education organizations increased 10.1 percent.

11.3%

Giving to environmental and animal organizations is estimated to have increased 11.3 percent between 2018 and 2019, to \$14.16 billion. Adjusted for inflation, donations to the environment/animals sub-sector increased 9.4 percent.

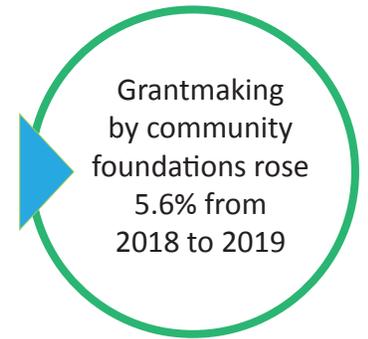
National Trends: Community Foundation Giving

A Community Foundation is a tax-exempt charitable organization that provides support primarily for the needs of the region or geographic community in which it is based. It maintains, administers, and distributes funds on behalf of multiple donors. Due to their broad public support, the IRS does not consider community foundations to be private foundations.

Fund Diversity

Larger community foundations continue to have higher proportions of assets in donor-advised funds.

Size of Foundation	Donor-Advised Funds	Discretionary Funds	All Other Funds
▶ \$0-\$25M	10%	28%	62%
▶ \$25-\$50M	12%	20%	69%
▶ \$50-\$100M	25%	19%	56%
▶ \$100-\$250M	27%	15%	59%
▶ \$250-\$500M	32%	16%	52%
▶ \$500M+	36%	12%	52%
▶ All	22%	19%	59%



Giving USA: The Annual Report on Philanthropy for the Year 2019 (2020).
Chicago: Giving USA Foundation

Distribution Rates

Larger community foundations tend to have higher fund distribution rates.

Size of Foundation	Donor-Advised Funds	Whole Foundation
▶ <\$25M	4%	4%
▶ \$25-\$50M	6%	4%
▶ \$50-\$100M	11%	6%
▶ \$100-\$250M	9%	6%
▶ \$250-\$500M	12%	8%
▶ >\$500M	14%	7%

Community Foundations across Wisconsin quickly created COVID-19 relief funds to respond to needs across rural, suburban, and urban communities, including:

- ▶ [Community Foundation of North Central Wisconsin COVID-19 Impact Fund](#)
- ▶ [Greater Green Bay Community Foundation Emergency Fund](#)
- ▶ [Community Foundation for the Fox Valley Region COVID-19 Community Response Fund](#)
- ▶ [MCF COVID-19 Priority Fund](#)

Changes in Gift and Grant Activity

Community foundations have seen great variability in the increase or decrease in grants and gifts. With 80% reporting changes in gifts and 65% reporting changes in grants.

Type of Activity	Dramatic Decrease	Moderate Decrease	Neutral	Moderate Increase	Dramatic Increase	Median Change
▶ Gifts	8%	29%	20%	15%	28%	2%
▶ Grants	1%	19%	35%	31%	14%	8%

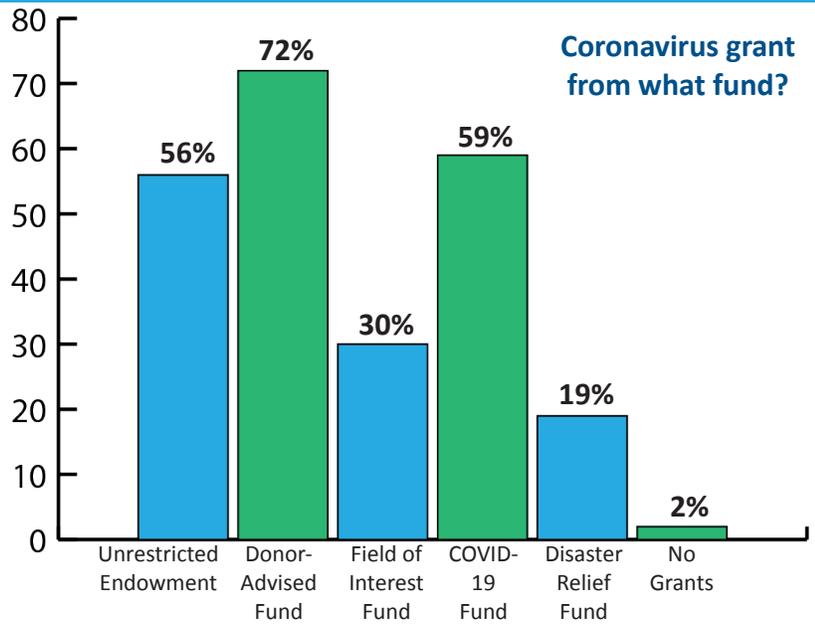
National Trends: Community Foundation Giving

Community Foundations Responding

Community Foundations are responding to community needs amplified by 2020 crises. A national **Coronavirus Pandemic Survey** by the Community Foundation Research and Training Institute reveals:

- ▶ **82%** of community foundations have created a fund dedicated to providing grants to support organizations dealing with the pandemic. Of the remaining **18%** most are using a disaster relief fund that already existed, but has been repurposed to help local coronavirus efforts.
- ▶ **98%** of community foundations have made a grant to deal with the local response to the crisis.

*Community Foundation Research and Training Institute:
Community Foundation Response to Coronavirus Pandemic*



Philanthropy in the Fox Valley Region

Curt Detjen | Community Foundation for the Fox Valley Region



Our COVID-19 experience is teaching us a lot about ourselves and how a highly functioning philanthropic community can make a profound impact. We're still learning. I'll share a few thoughts about our journey.

We must all recognize that this is exactly a moment for which modern philanthropy was built. Our Fox Valley region is filled with individuals, corporations and foundations that do good in our community. We're a top charitable region in the country and this was the time to show it. The funding community — including individual givers — came together to meet this unprecedented moment with unprecedented generosity and selflessness.

Our Community Foundation has a rich history of bringing people together to help solve problems that lead to greater flourishing for all. In this moment, we decided not to go it alone. Rather, we joined with our accomplished partner, United Way Fox Cities. In this pandemic moment, rather than walking side-by-side, we linked arms, so together we could be stronger for our community.

Each partner committed time and knowledge to create the **COVID-19 Community Response Fund** and were the first investors with \$50,000 each. This became more than a \$1.5 million impact through community donations and grants. Challenges create opportunities to innovate and grow, to not only return things to normal but to be better. We're focused on doing just that.

Our donors' responses have been heartwarming, as well. The pandemic elevated their passions for giving back. We acted, and asked others to join us to accelerate giving timelines to meet the need and relax restrictions to give more unrestricted support to our nonprofit organizations who in turn provide aid to the community.

It worked. In April, our grants increased over the same period last year from \$1.6 million to over \$5 million. We and our donors more than tripled our giving! Donor advised funds led the way. When you have a community that cares and organizations prepared to act, you can mobilize quickly, make changes on short notice and move in a positive direction.

Community philanthropy is about relationships, trust and integrity. We're proud of the place we call home and the way we care for one another. We can and will emerge stronger for the experiences and lessons learned. Meanwhile, we rely upon one another and continue to drive forward with linked arms with our partners. That's the Fox Valley way.



National Trends: Family Foundation Giving

Giving through Family Foundations is shifting. Results of the second National Benchmark Survey of Family Foundations from the National Center for Philanthropy finds:

Newer Foundations Focus on Issues

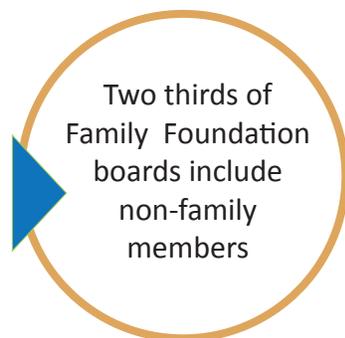
Older and larger family foundations focus their giving geographically, while the vast majority of newer family foundations (those formed since 2010) focus their giving on issues.

More Diversity and Non-family Leaders

Two-thirds of family foundation boards include non-family board members. The total number and percentage of non-family board members has grown significantly over the past five years. Foundations created since 1990 are significantly more likely to have at least three non-family board members. On boards where there is at least one non-family member, non-family makes up close to half of all board seats.

The gender distribution of family foundation boards continues to be fairly even. About one-third of foundation boards include at least one person of color, and about one in ten have LGBTQ representation.

Nearly 70% of family foundations have non-family staff working for the foundation. About 60% have family members serving in staff roles. However, nearly half say an unpaid family member manages the daily operations versus a paid non-family staff member. Approximately one-quarter have a paid family member responsible in part for daily operations.



Currently, 25% use Diversity, Equity, and Inclusion (DEI) goals/strategies to guide giving, 16% use outside DEI experts, and 15% say DEI considerations are very influential to their giving approach. DEI considerations are significantly more common in family foundations formed in the past 10 years. Fully one in three family foundations have DEI initiatives in their future plans.

Newer family foundations are much more likely to report that they assess DEI outcomes and analyze the racial/ethnic/other demographics of grantees.

Trends 2020

BUILDING A BETTER HOMETOWN

Northwestern Mutual believes in Milwaukee and we are proud to support this event.

 **Northwestern Mutual**

Northwestern Mutual is the marketing name for The Northwestern Mutual Life Insurance Company (NM), Milwaukee, WI and its subsidiaries.

Health Care Sector Leads Corporate Giving

The Health Care industry reported increased giving over the last three years according to the 2019 Giving in Numbers Report!

- ▶ **69%** of Health Care companies reported an increase in giving, which led other corporate giving sectors between 2016 and 2018. The absolute value of giving of all Health Care companies was also the highest compared to any other sector.
- ▶ The increase is concentrated mostly in Pharmaceutical and Health Care Facilities and Services.
- ▶ An increase in “product donations for patient support programs, global Disaster Relief programs, and response to the opioid crisis, as well as the increased support of assistance funds”, accounted for some of the Health Care sector increases.



Children's Hospital of Wisconsin

Chief Executives for Corporate Purpose, Giving in Numbers: 2019 Edition

National Trends: Higher Education Giving

Contributions to education organizations grew **12.1%** in current dollars from 2018 to \$64.11 billion in 2019. Adjusted for inflation, giving to education organizations increased **10.1%**.

According to the Council for Advancement and Support of Education, contributions to higher education institutions grew **6.1%** in fiscal year 2019.

Higher education institutions in Blackbaud Institute's Charitable Giving Report saw a **7.0%** increase in online giving between 2018 and 2019.

Giving to the education sub-sector amounted to **14%** of total giving in 2019.

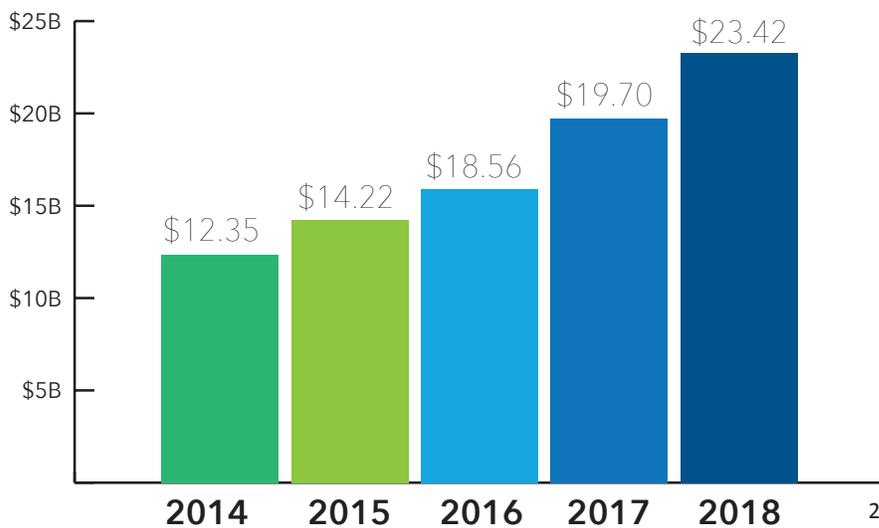
In 2019, contributions to education totaled the highest inflation-adjusted value recorded to date.

National Trends: Donor-Advised Funds Giving

Charitable assets in donor-advised funds grew from **112.10 billion in 2017 to 121.42 billion in 2018**, an **8.3% increase**. From 2014-2018, charitable assets rose by a compound annual growth rate of **14.7%**. Growth includes contributions and investments yield less assets distributed in grants.

In 2018, there were approximately **728,563 individual donor-advised funds** across the country.
 • **55.2% increase**

Total Grants Made by Donor-Advised Funds (in billions)



Grants from donor-advised funds to qualified charities totaled an estimated **\$23.42 billion**, representing an increase of **18.9%** compared to 2017, which is revised to \$19.70 billion.

2019 Donor-Advised Fund Report, National Philanthropic Trust

Donor-Advised Fund Metric Overview

	2017	2018	% Change
Charitable Assets	\$112.10	\$121.42	8.3%
Total Contributions	\$30.90	\$37.12	20.1%
Total Grant Dollars	\$19.70	\$23.42	18.9%
Grant Payout*	22.8%	20.9%	-1.9 percentage points
Total # of DAF Accounts	469,331	728,563	55.2%
Avg. Size of DAF Account (\$)	\$238,857	\$166,653	-30.2%

*Following the Foundation Center model for calculating payout rates for independent foundations, the payout rate for donor-advised funds is this year's grants divided by last year's total assets. (\$ in billions except as noted.)

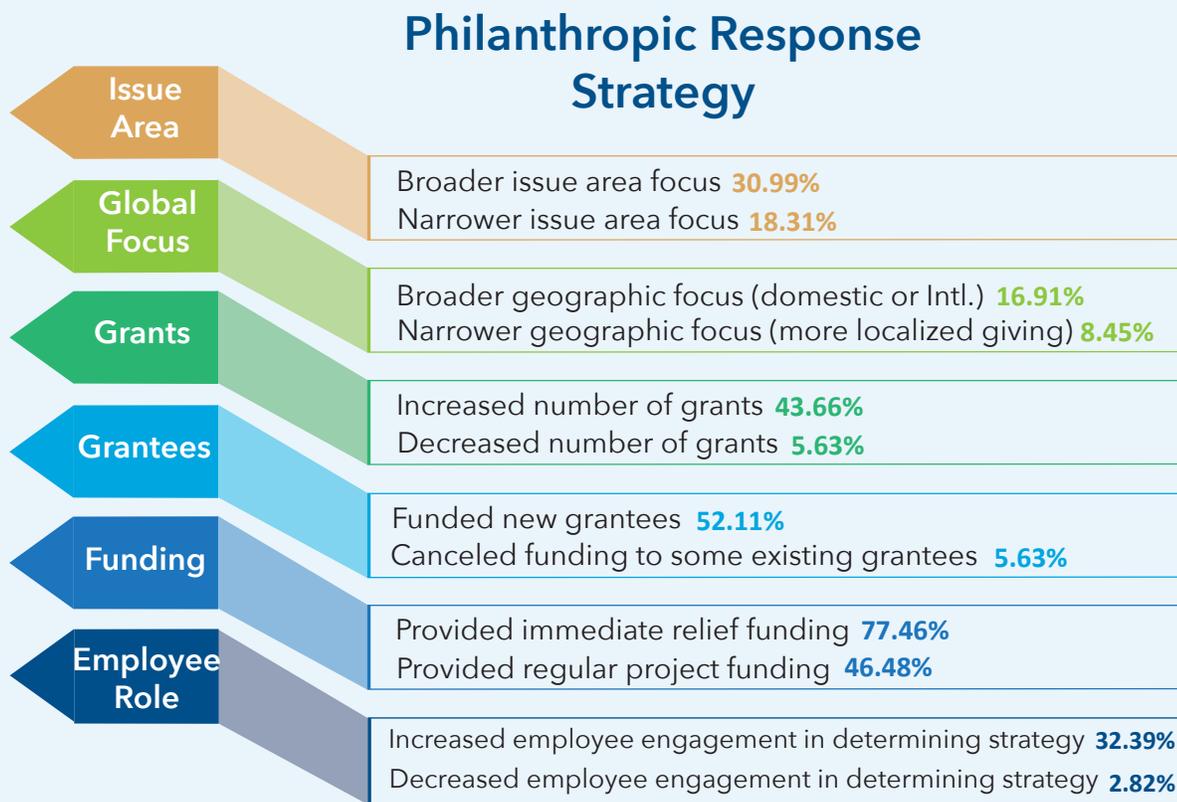
Corporate Giving in 2019

Corporate Giving includes both Corporate Giving Programs, grantmaking programs established and administered within a for-profit company, and Corporate Foundations, a legally separate private foundation that derives its grantmaking funds primarily from the contributions of a profit-making business:

- ▶ Corporate Foundation giving in 2019 is estimated to have increased by **10.5%**, for a total of \$7.52 billion. This includes cash and in-kind contributions as well as grants and gifts.
- ▶ In 2019, corporate giving was influenced by U.S. Gross Domestic Product (GDP) increase of **4.1%** over 2018, and flat corporate pre-tax profits at 0.2 percent in current dollars.

Giving USA: The Annual Report on Philanthropy for the Year 2019 (2020). Chicago: Giving USA Foundation

Corporate Philanthropy's Response to COVID-19



CAF America Survey, Volume 4 | cafamerica.org

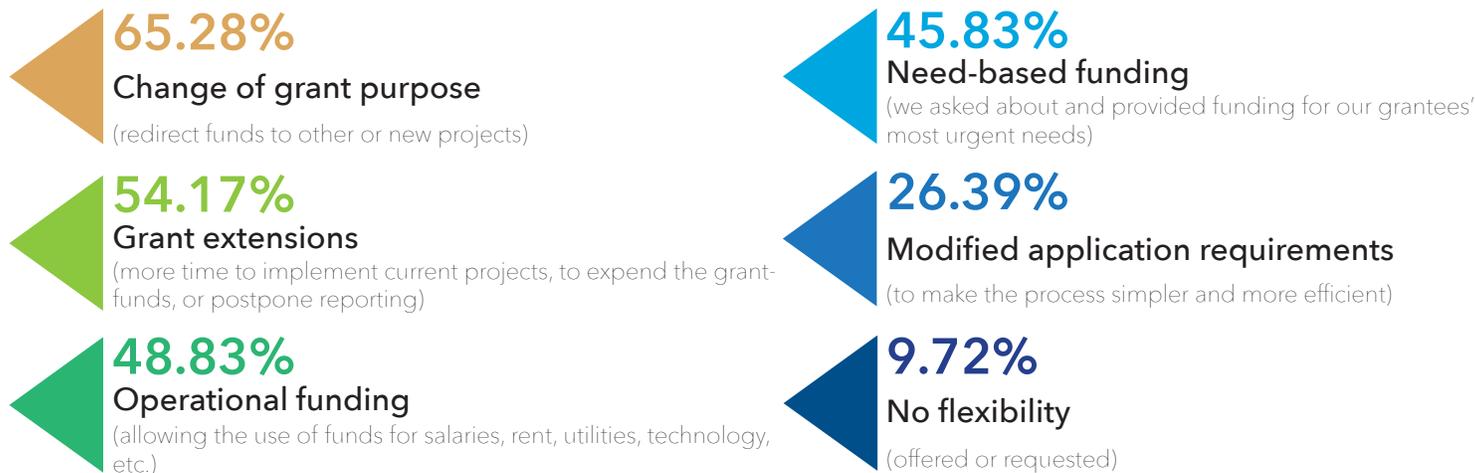
The chart above depicts how the global pandemic is impacting the philanthropic giving of corporate foundations, based on CAF America's survey of corporations, from Fortune 500 companies to small and medium-sized enterprises. The **Voice of Corporate Philanthropy in Response to COVID-19 Worldwide** had several notable findings about the strategy and flexibility of corporate giving.

First and foremost, corporations around the world are responding to the pandemic by giving more in a time of need. In fact, 72% of CAF survey respondents are increasing their contributions to charities.

COVID-19 Corporate Giving has reached all 50 states and Puerto Rico. Companies are demonstrating agility and report shifting their philanthropic strategy.

Philanthropic Response Flexibility

Corporate philanthropy is demonstrating flexibility. Companies report changing grantmaking practices to respond to needs:



Looking forward, 2/3 of companies CAF surveyed “anticipate maintaining current levels of giving or increasing their funding.” Corporate philanthropy is also considering applying a racial equity and social justice lens to future giving. For more information, visit: cafamerica.org.

CAF America Survey, Volume 4 | cafamerica.org

2020 Isn't Giving Up - So Alliant Energy Foundation Won't Either

The Alliant Energy Foundation serves customers and builds strong communities during a year of surprises.

March - May

COVID-19 response: We focused on our communities – making calls and donations to area food banks, the American Red Cross and United Way. We funded 3D printing of protective face shields for healthcare workers and added \$2 million to our Hometown Care Energy Fund. Employees hosted an online diaper drive, collecting 41,000 diapers for local families.



Nature saves sanity: We've invested hundreds of thousands of dollars into community outdoor spaces. This spring, those projects became quarantine MVPs! The Ice Age Trail, Wautoma bike routes and local nature trails became a lifeline for people to get out of the house safely.

May - June

Responding to racial injustice: George Floyd's story catalyzed conversations across our company. Hundreds of employees engaged in thoughtful listening sessions hosted by the Multicultural Alliance. We formed a new Diversity Equity and Inclusion Leadership Team. And we're taking an even closer look at how our charitable giving can lift underserved groups in our communities.

August

Midwest derecho: On August 10, a “land hurricane” pummeled parts of Iowa and southern Wisconsin – cutting power to more than 240,000 of our customers and employees. We quickly secured food from Second Harvest Foodbank of Southern Wisconsin and Kwik Trip, and transported it to Iowa neighborhoods. We also set up a 2:1 Foundation matching gift, so employees could help customers in need get back in their homes.

What's next? Who knows! In a year when all bets are off, we'll keep doing the next right thing for the customers and communities we serve.



In partnership with Milwaukee School of Engineering, a dynamic hub for STEM education opens

Ashley Johnson | Rockwell Automation

Milwaukee School of Engineering (MSOE) and its industry partners We Energies, Rockwell Automation and American Family Insurance opened a premiere STEM education center this fall. The center will enable MSOE to continue to grow its in-house programming while providing unique opportunities to collaborate on programs with K-12 schools, local companies, community groups and organizations.

These programs are designed to introduce students to science, technology, engineering and mathematics by providing access to resources, mentoring, and hands-on, experience-based learning—a hallmark of an MSOE education.

Rockwell Automation is thrilled to partner with MSOE students, alumni and partners who mentor and support for Inspiration and Recognition of Science and Technology (FIRST)[®] teams who will now have a dedicated place to enable all students to “go pro” in STEM through FIRST[®]. Local teams will have access to storage space, tools and work equipment. The FIRST[®] Robotics Competition Zone will include space for a 1,500-square-foot playing field area where teams will have plenty of space to test their designs and practice for competitions.

Member Spotlight

At Rockwell Automation we believe in expanding human possibility. In our communities, we make investments in students—our makers, builders and future innovators. The center is an opportunity to decrease barriers and amplify resources students need to be successful in their STEM-related extracurricular activities.

You can learn more about the We Energies STEM Center at MSOE and its goal to provide accessibility and hands-on opportunities for students in Milwaukee by [clicking here](#).

Check out the video here: <https://vimeo.com/429618358>



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